

Course duration

- 1 day

Course Benefits

- Understand the features and tools that exist in Microsoft Dynamics 365 for CSR's and Service Managers
- Be familiar with the stages of the Service Case Management Process in Microsoft Dynamics 365
- Understand the fundamentals of Case Management. Be able to track, manage and resolve customer service requests using Case records in Microsoft Dynamics 365
- Know how to assign, resolve, reactivate, cancel and delete Case records
- Understand the significance of Service Level Agreements and how to create a Customer Schedule and apply SLA's to Customer and Case records through Entitlements
- How to setup and configure Queues and use Queue's to collaborate on Cases with other CSR's and Teams.
- How to implement a Case Routing Rules, and utilize Queue Items in Processes
- Understand the process to create and manage Knowledge Articles in the Knowledge Base
- Be familiar with the Knowledge Base approval process
- How to search the Knowledge Base and relate Knowledge Articles to Case records
- How to provision and navigate the Interactive Service Hub
- Effectively interact with the Interactive Service Hub Filters, Visualizations and Dashboards
- Create and manage Knowledge Articles in the Interactive Service Hub
- Perform Case Management in the Interactive Service Hub
- Explore the Service Reports and create a custom Service Report using the Reporting Wizard in Microsoft Dynamics 365
- Understand the significance of Service Goal Management and Metrics in Microsoft Dynamics 365
- Explore the Service Charts and Dashboards and create a custom Service Dashboard in Microsoft Dynamics 365

Course Outline

1. Introduction
 1. Examine common Customer Service Scenarios
 2. An Introduction to Service in Dynamics 365
 3. The Dynamics 365 Platform
 4. Dynamics 365 Service Fundamentals
 5. Security Considerations

6. Where to get Help
7. Further Reading and Resources
8. Lab 1: Service in Dynamics 365 Orientation
9. Explore the Service features in Dynamics 365
2. Case Management
 1. The Case Management Process
 2. Working with Case Records
 3. Working with the Case Form
 4. Case Assignment and Routing
 5. Cases and Activities
 6. Resolving Cases
 7. Reactivating, Cancelling and Deleting Cases
 8. Service Level Agreements
 9. Lab 1: Working with Cases
 10. Create a Case record
 11. Assign a Case record
 12. Resolve a Case record
 13. Reactivate a Case record
 14. Cancel a Case record
 15. Lab 2: Service Level Agreements and Cases
 16. Create a Customer Schedule for the SLA
 17. Create a new Service Level Agreement
 18. Activate a Service Level Agreement
 19. Create an Entitlement
 20. Relate a Case to a Service Level Agreement
3. Working with Queues
 1. Introduction to Service Queues
 2. Common Service Queue Scenarios
 3. Creating and Managing Queues
 4. Working with Queue Items
 5. Case Routing Rules
 6. Processes and Queues
 7. Lab 1: Create a Case Routing Queue
 8. Creating Queues
 9. Create a Case Routing Rule
 10. Route a Case to a Queue
 11. Working with Queues and Queue Items
4. Using the Knowledge Base
 1. In this module we will start to look at the Knowledge Base in Microsoft Dynamics 365. We look at where the Knowledge Base fits into the Service Management Process, present Knowledge Base Article Templates and examine the Article approval process. Finally, we wrap up with searching the Knowledge Base and relating Articles to Case records.
 2. Introduction to the Knowledge Base
 3. Knowledge Base Concepts
 4. Working with Articles
 5. Searching the Knowledge Base

6. Email a Knowledge Article
7. Lab 1: Create Knowledge Base Articles
8. Create an Article Template
9. Update the Subject Tree
10. Create a new Knowledge Base Article
11. Submit a Knowledge Base Article for Approval
12. Reject a Knowledge Base Article
13. Approve a Knowledge Base Article
14. Lab 2: Create a Case and interact with the Knowledge Base
15. Create a new Case
16. Relate a Knowledge Base Article to a Case
17. Email a Knowledge Base Article to a Customer
5. The Interactive Service Hub
 1. Introduction the Interactive Service Hub
 2. The Tier 1 Dashboard
 3. The Tier 2 Dashboard
 4. The My Knowledge Dashboard
 5. The Knowledge Manager Dashboard
 6. Working with Cases in the Hub
 7. Working with Knowledge Articles in the Hub
 8. Working with Visualizations and Filters in the Hub
 9. Lab 1: Using the Interactive Service Hub
 10. Explore the Interactive Service Hub
 11. Manage Streams in the Interactive Service Hub
 12. Resolve a Case in the Interactive Service Hub
 13. Create a KB Article in the Interactive Service Hub
 14. Manage KB Articles in the Interactive Service Hub
 15. Relating a Case to an Interactive Service Hub KB Article
6. Service Analysis
 1. Introduction to Service Analysis in Dynamics 365
 2. The Service Reports
 3. The Reporting Wizard
 4. Working with Service Charts
 5. Working with Service Dashboards
 6. Working with Service Goals and Metrics
 7. Lab 1: Explore the Service Reports
 8. Exploring the Case Summary Table Report
 9. Exploring the Neglected Cases Report
 10. Lab 2: Service Goals and Metrics
 11. Create Goals for the Service Team
 12. Create a Personal View
 13. View Sales Goals and Chart
 14. Lab 3: Explore the Service Charts and Dashboards
 15. Explore the Case Charts
 16. Create a custom Service Chart
 17. Explore the Service Dashboards
 18. Create a custom Service Dashboard

Class Materials

Each student will receive a comprehensive set of materials, including course notes and all the class examples.

Class Prerequisites

Experience in the following *is required* for this Dynamics 365 class:

- An existing working knowledge of either Microsoft Dynamics 365 or Microsoft Dynamics CRM.

Prerequisite Courses

Courses that can help you meet these prerequisites:

- [Introduction to Microsoft Dynamics 365](#)