

Microsoft Dynamics 365 for Customer Service

Build great customer relationships by focusing on optimum customer satisfaction with the Customer Service apps. Customer Service provides many features and tools that organizations can use to manage the services they provide to customers.

Détails

- **Code** : MB-CRM-CS
- **Durée** : 2 jours (14 heures)

Public

- Architectes
- Chefs de projets
- Consultants
- Consultants informatiques
- Ingénieurs
- Professionnels de l'IT

Pré-requis

- , it is recommended to follow the "Dynamics 365 for Customer Engagement: the basics" first.

Objectifs

Programme

Customer Service Hub

- Work with cases and manage SLAs
- Create, manage and search for knowledge articles
- Work with interactive dashboards
- Use Customer Service Hub on mobile devices
- Upgrade to Customer Service Hub
- Keyboard navigation support

Customer Service app

- Create and manage a case
- Add an activity to a case
- Find what's assigned to you in a queue
- Assign an activity to a user or queue
- Merge similar cases
- Create and manage parent and child cases
- Find knowledge articles from within a record

Service Manager Guide

- Understand Service Management
- Case Settings
- Create and manage queues
- Define parent and child case settings
- Automatically route cases using routing rule sets
- Automatically create and update records

- Automatically create a case from an email
- Define subjects to categorize cases

Service Terms

- Define Service Level Agreements (SLAs)
- Enable entities for service level agreements
- Create entitlements to define support terms
- Create and manage holiday schedule
- Create customer service schedule
- Manage service configuration settings

Templates

- Set up entitlements using entitlement templates
- Create email templates
- Create article templates
- Create knowledge article template

Knowledge Base Management

- Set up knowledge management using embedded knowledge search
- Create and manage categories
- Similar Record Suggestions
- Use advanced similarity rules to view similar case suggestions

Modalités

- **Type d'action** :Acquisition des connaissances
- **Moyens de la formation** :Formation présentielle – 1 poste par stagiaire – 1 vidéo projecteur – Support de cours fourni à chaque stagiaire
- **Modalités pédagogiques** :Exposés – Cas pratiques – Synthèse
- **Validation** :Exercices de validation – Attestation de stages