# Introduction to service in Dynamics 365 (AB-6004)

**ID** AB-6004 **Price** CHF 690.—(excl. VAT) **Duration** 1 days

## Who should attend

This course is tailored for professionals who aim to enhance and automate business processes using Dynamics 365 customer engagement apps, while leveraging native interconnectivity with Microsoft 365. It is ideal for those looking to support customers efficiently through AI-driven Dynamics 365 Customer Service, improve customer experience with AI-first omnichannel communication in Dynamics 365 Contact Center, and boost first-time resolution rates for on-site workers using AI-driven Dynamics 365 Field Service.

## Course Content

### Describe the foundations of Dynamics 365 customer engagement apps

- Introduction
- Describe customer engagement apps in Dynamics 365
- Describe the cross-solution capabilities of customer engagement apps
- Navigate to and within customer engagement apps
- Describe the Timeline feature in customer engagement apps
- Exercise - Navigate Dynamics 365 apps
- Explore prompting in Dynamics 365 apps with Copilot Chat
- Describe security in customer engagement apps
- Describe the AI form filling assistant
- Manage daily actions with the communications assistant
- Module assessment
- Summary

### Explore self-service capabilities in Dynamics 365

- Introduction
- Describe self-service in Dynamics 365 Contact Center
- Describe knowledge management in Dynamics 365 Customer Service
- Exercise - Create a knowledge article
- Describe the Knowledge Management Agent
- Module assessment
- Summary

### Explore case management in Dynamics 365 Contact Center

- Introduction
- Describe the capabilities of Dynamics 365 Contact Center
- Describe the case lifecycle
- Describe channels in Dynamics 365 Contact Center
- Exercise - Create a chat channel
- Describe routing capabilities in Dynamics 365
- Describe case reporting and analytics in Dynamics 365 Contact Center
- Describe the supervisor experience in Dynamics 365 Contact Center
- Describe Agent Hub
- Module assessment
- Summary

### Describe workforce management in Dynamics 365 Contact Center

- Introduction
- Describe Workforce Management (WFM) in Dynamics 365 Contact Center
- Describe forecasting and capacity planning
- Describe scheduling and shift planning
- Explore Microsoft 365 Copilot for Service
- Module assessment
- Summary

### Utilize onsite service capabilities in Dynamics 365 Field Service

- Introduction
- Describe use cases for Dynamics 365 Field Service
- Describe the work order lifecycle
- Describe the Dynamics 365 Field Service mobile app
- Describe resource and scheduling processes
- Describe the Scheduling Operations Agent
- Exercise - Create and schedule a basic work order in Dynamics 365 Field Service
- Module assessment
- Summary

### Describe shared capabilities in Dynamics 365 customer engagement apps

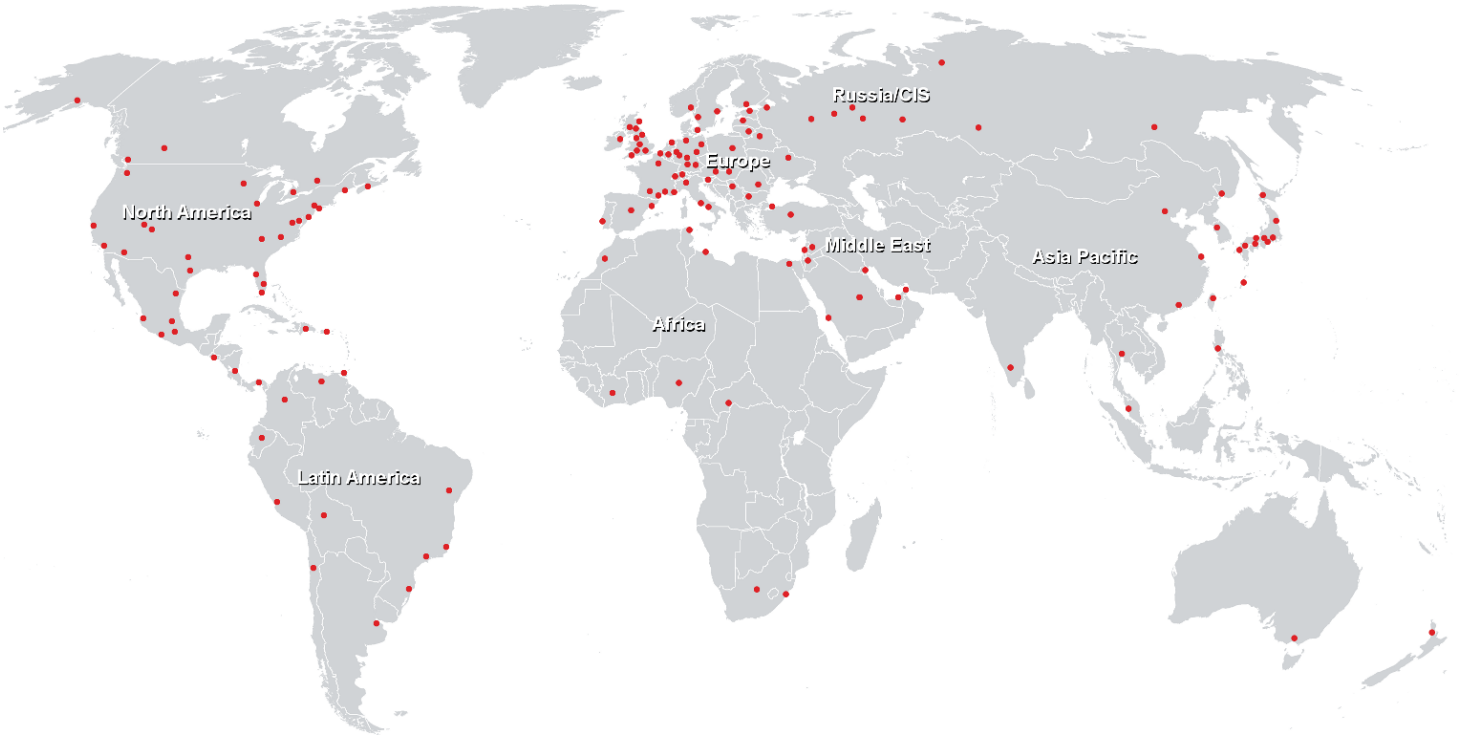
- Introduction
- Describe the options for tailoring customer engagement apps to meet business needs
- Enhance customer engagement apps with Microsoft Power

Platform Integration

- Describe reporting capabilities including charts, dashboards, and views
- Describe Microsoft 365 integrations
- Describe the capabilities of Copilot in customer engagement apps
- Describe autonomous agents in Dynamics 365
- Module assessment
- Summary

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