

**Microsoft Dynamics 365 Customer Service (MB-230)**

**Course Number:** MOC-MB-230  
**Duration:** 4 days

**Overview**

This Microsoft official course, MB-230: Microsoft Dynamics 365 Customer Service, teaches you how to use the automation tools available in MS Dynamics. Learn time-saving skills, including how to use automatic case creation and queue management to free up your hours to focus on what's important: interacting with your customers. This course prepares students for the [MB-230 exam](https://docs.microsoft.com/en-us/learn/certifications/exams/MB-230) for which every attendee receives a voucher.

**Prerequisites**

Students should be functional consultants working with Dynamics 365 Customer Service, or functional consultants who work with other Dynamics 365 apps who want to expand their knowledge of Customer Service.

**Materials**

All Microsoft Dynamics 365 Customer Service training students receive Microsoft official courseware.

For all Microsoft Official Courses taught in their entirety that have a corresponding certification exam, an exam voucher is included for each participant.

**Software Needed on Each Student PC**

Attendees will not need to install any software on their computer for this class. The class will be conducted in a remote environment that Accelebrate will provide; students will only need a local computer with a web browser and a stable Internet connection. Any recent version of Microsoft Edge, Mozilla Firefox, or Google Chrome will be fine.

**Objectives**

* Optimize Dynamics 365 Customer Service to improve your customer relations
* Work with case status reason transitions, and configure custom status transitions
* Set up Dynamics 365 tables so that they can be used with queues
* Configure the Power Automate flow to map a contact manually
* Create and manage user setup
* Work with Omnichannel for Dynamics 365 Customer Service
* Work with Connected Customer Service for Dynamics 365 and Azure IoT

**Outline**

* Get started with Dynamics 365 Customer Service
* Managing cases with Dynamics 365 Customer Service Hub
* Use Microsoft Dynamics 365 Customer Service queues to manage Case Workloads
* Create or update records automatically in the Customer Service Hub
* Get started with Unified Routing for Dynamics 365 Customer Service
* Create and manage entitlements in Microsoft Dynamics 365 Customer Service
* Create knowledge management solutions in Dynamics 365 Customer Service
* Use knowledge articles to resolve Dynamics 365 Customer Service cases
* Create a survey project with Dynamics 365 Customer Voice
* Create customer surveys with Dynamics 365 Customer Voice
* Send Dynamics 365 Customer Voice surveys
* Automate Dynamics 365 Customer Voice surveys with Power Automate
* Set up Customer Service Scheduling
* Schedule services with Customer Service Scheduling
* Enhance agent productivity with Customer Service workspace
* Create custom experiences for agents with the App profile manager in Customer Service
* Getting started with Omnichannel for Customer Service
* Route and distribute work with unified routing in Dynamics 365 Customer Service
* Deploy an SMS channel in Omnichannel for Dynamics 365 Customer Service
* Deploy chat widgets with Omnichannel for Dynamics 365 Customer Service
* Create smart assist solutions in Omnichannel for Dynamics 365 Customer Service
* Get started with Customer Service Insights
* Create visualizations for Dynamics 365 Customer Service
* Get started with Connected Customer Service for Dynamics 365 and Azure IoT
* Register and manage devices with Connected Customer Service for Dynamics 365 and Azure IoT
* Create custom apps for Dynamics 365 Customer Service
* Integrate a Power Virtual Agents bot with Omnichannel for Customer Service
* Conclusion