

# Managing Customer Engagement with Microsoft Dynamics 365

81900

Resume Course

## ABOUT THIS COURSE

Accelerate your career by gaining experience with the latest customer engagement applications from Microsoft.

Learn in-demand technology skills applicable for a wide range of job opportunities which include service, marketing, information technology, and consultancy roles. Complete this customer engagement course to receive a certificate of achievement which will allow you to showcase your skills and give you a competitive advantage in the job market.

Microsoft Dynamics 365 business applications help organizations worldwide empower their employees, engage customers, and optimize operations. Powered by data and intelligence, Dynamics 365 allows organizations to capture new business opportunities and efficiently engage with customers.

This course prepares you for success in today's modern workplace by showing you how to use the customer engagement applications of Dynamics 365. Consume a variety of videos, scenarios, and success stories designed to showcase the powerful features available. Develop your customer engagement skills by completing the hands-on course activities.

Enroll in this course today! View the syllabus below.

### Module 1: Customer Relationship Management

This module explains the basic concepts of Customer Relationship Management (CRM). Topics include:

- What is CRM?

- Examining CRM strategy
- Exploring the concept of digital transformation
- Learning how digital transformation is changing the way organizations manage customer relationships
- Engaging and working with customers

## **Module 2: Dynamics 365 for Customer Service**

This module explains how organizations use Dynamics 365 for Customer Service to deliver faster personalized service and support, which adds value to every customer interaction. Topics include:

- Managing customer support requests
- Creating compelling customer experiences using routing automation
- Enabling employees to resolve issues faster with knowledge management

## **Module 3: Customer Self-Service**

This module examines how customers can interact with organizations and explores the methods organizations use to deliver customer self-support options.

Topics include:

- Examining industry trends affecting customer self-support
- Delivering an omni-channel experience across multiple platforms
- Creating chat solutions
- Utilizing bots to provide automated support options

## **Module 4: Actionable Analytics**

This module demonstrates the analytics and data visualization tools of Dynamics 365. Topics include:

- Analyzing customer data using charts and dashboards
- Connecting with Microsoft Excel for analytics
- Interpreting customer data using Microsoft Power BI

## **Module 5: Dynamics 365 for Field Service**

This module explores how organizations use Dynamics 365 for Field Service to better serve customers by tracking the field service experience at every step.

Topics include:

- Generating a work order using Internet of Things (IoT) devices
- Associating qualified technicians to a work order
- Dispatching technicians and updating customers
- Delivering solutions on mobile devices

## Trial Environment

Many of the activities that you will be accomplishing during this course require a Dynamics 365 Trial Environment to complete. It is important that you sign up for a Trial environment prior to beginning the student activities.

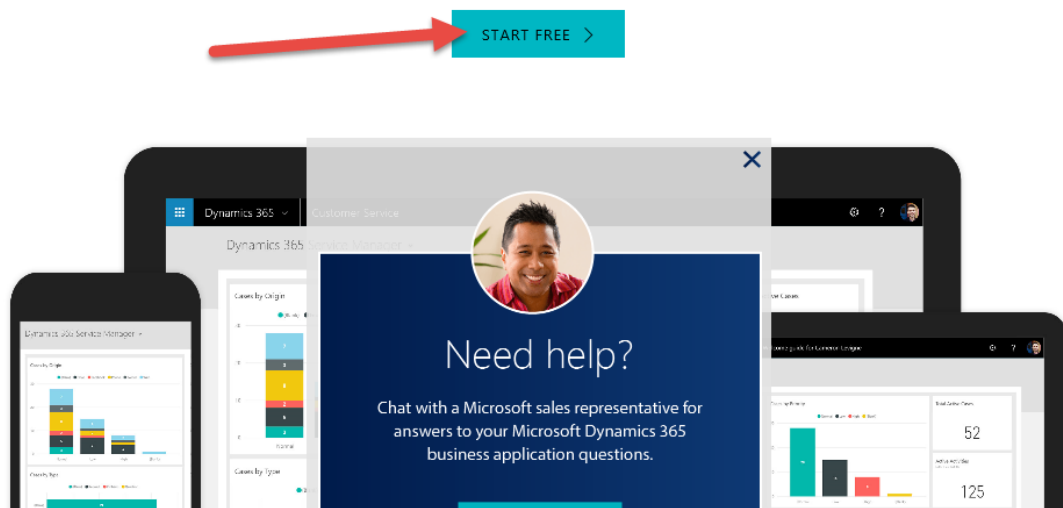
Your trial environment should have the following Dynamics 365 Solutions installed.

- Dynamics 365 for Sales
- Dynamics 365 for Service

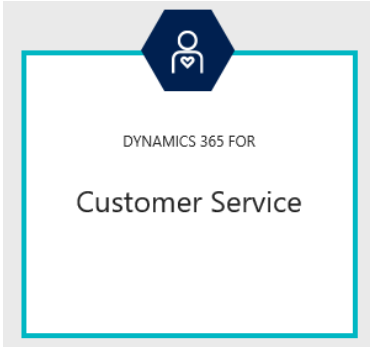
Instructions for obtaining a trial environment are outlined below:

1. To obtain a trial, click the following link: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/admin/try-dynamics-365-online>
2. Select the type of trial you want. (*For this course choose Dynamics 365 for Customer Service*)
3. Scroll down the page, and click the **Start Free** Button

## Try Microsoft Dynamics 365 for Customer Service



4. Select Dynamics 365 for Customer Service



5. You need to provide an organizational or work email account, and a phone number. (ex. Google or Yahoo will not work). If you have a school address use that. Click **Get Started**

The image shows a registration form with a light gray background. It has two input fields: "Work email" with an information icon and "Phone number". Below the fields is a teal button with the text "GET STARTED >".

Work email i

Phone number

**GET STARTED >**

6. A code will be sent to the email address that you provided. Fill in the form with your information and supply the registration code you were provided through e-mail. Click **Create**

# Create a password

Derik Bormann

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We sent a verification code to [redacted] Enter the code to complete signup.

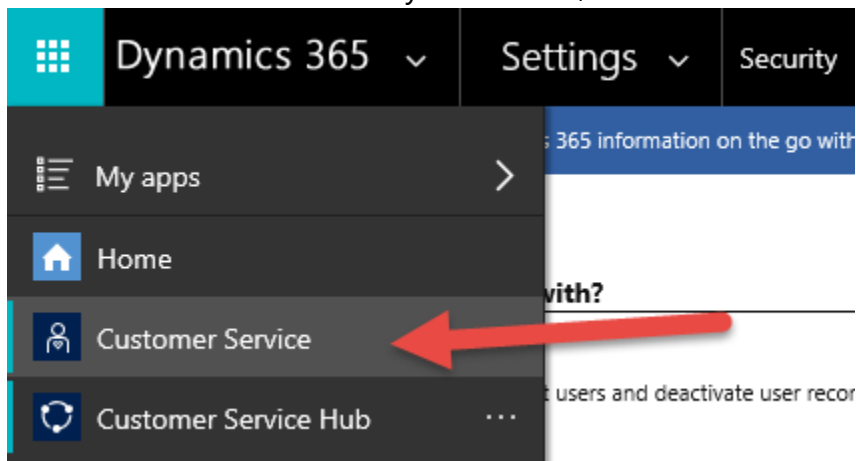
XXXXXX [resend signup code](#)

Microsoft will send you promotions and offers about Microsoft products and services for businesses. You can unsubscribe anytime.

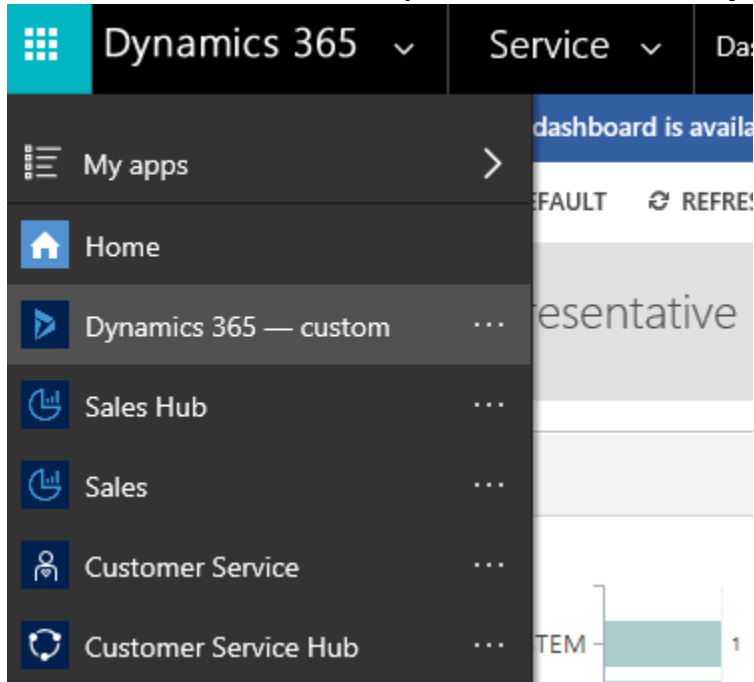
By choosing **Create**, you agree to our [terms and conditions](#) and understand that your name, email address, and trial organization name will be visible to other people in your institution. [Microsoft Privacy Policy](#)



7. It can take several minutes to setup your organization. During the process you may be prompted you to sign-in with the account information that you just created
8. After setup has completed you will be taken to your Dynamics 365 organization.
9. Click on the Arrow next to Dynamics 365, choose Customer Service



10. Navigate to **Settings > Security**, select **Users**
11. Select your user record, and click **Promote to Admin**
12. Press **F5** to reload the Application. You will now have complete access to all of the Dynamics 365 Modules
13. Click on the Arrow next to Dynamics 365, choose **Dynamics 365 – Custom**



14. Add this page as a bookmark for future reference