Introduction to service in Dynamics 365 Training

Duration: **1 Day**

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Overview

The **Introduction to Service in Dynamics 365** course provides a foundational understanding of how to enhance and automate business processes using **Dynamics 365 Customer Engagement apps** and **Microsoft 365 integrations**.

Participants will learn to:

- Support customers efficiently through **AI-driven Customer Service**,
- Improve customer experience using **AI-first omnichannel communication** in Dynamics 365 Contact Center,
- Enhance field operations with **AI-enabled Dynamics 365 Field Service**.

This 1-day course combines conceptual learning, guided exercises, and interactive simulations to help learners apply best practices directly to real-world business scenarios.

Prerequisites

Participants should have:

- Basic familiarity with **business processes and customer engagement concepts**,
- Hands-on experience with **Microsoft 365 applications** in a business setting.

Who Should Attend

This course is ideal for professionals who want to:

- Improve and automate customer engagement workflows,
- Leverage **Microsoft 365** and **Power Platform** integrations,
- Deliver AI-powered customer support and field service experiences.

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What You Will Learn

By the end of this course, learners will be able to:

- Understand core features and integrations of Dynamics 365 Customer Engagement apps.
- Use self-service tools such as knowledge bases and virtual agents.
- Manage customer cases and omnichannel communications in Dynamics 365 Contact Center.
- Apply workforce management tools for scheduling and forecasting.
- Manage field operations with work order lifecycle and mobile applications.
- Integrate and customize Dynamics 365 with Power Platform, AI tools, and Microsoft 365 services.

Outline

Module 1: Describe the foundations of Dynamics 365 customer engagement apps

Explore Dynamics 365 customer engagement apps to understand their features, integration capabilities, and tools for better customer interaction.

- 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
- Module assessment
- Summary

Module 2: Explore self-service capabilities in Dynamics 365

Learn how to use self-service tools in Dynamics 365 to create seamless, efficient customer support experiences through knowledge articles and virtual agents.

- 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

Module 3: Explore case management in Dynamics 365 Contact Center

Dive into Dynamics 365 Contact Center to learn about case management, automation, routing options,

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analytics tools, omnichannel engagement, and Agent Hub.

- 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

Module 4: Describe workforce management in Dynamics 365 Contact Center

Discover the key capabilities of Workforce Management, including forecasting, scheduling, and AI-powered tools 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

Module 5: Utilize onsite service capabilities in Dynamics 365 Field Service

Use Dynamics 365 Field Service to manage field service operations, optimize workflows, and increase customer satisfaction.

- 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

Module 6: Describe shared capabilities in Dynamics 365 customer engagement apps

Examine integration, AI-driven tools, and customization features for tailoring Dynamics 365 customer engagement apps to business requirements.

- 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

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- Module assessment
- Summary