

# AB-6004: Introduction to Service in Dynamics 365

## Course Overview

Explore how Dynamics 365 service apps support AI-powered business through autonomous agents, intelligent scheduling, Copilot-driven service experiences, and embedded analytics to streamline customer interactions and optimize operational efficiency.

## Prerequisites

None

### Module 1: Describe the Foundations of Dynamics 365 Customer Engagement Apps

- 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 2: Explore Self-Service Capabilities in Dynamics 365

- 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 3: Explore Case Management in Dynamics 365 Contact Center

- 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 4: Describe Workforce Management in Dynamics 365 Contact Center

- 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 5: Utilize Onsite Service Capabilities in Dynamics 365 Field Service

- 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 6: Describe Shared Capabilities in Dynamics 365 Customer Engagement Apps

- 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