

MB-230 - Dynamics 365 for Customer Service

- **Download Latest Student Handbook and AllFiles Content**
`/home/ll/Azure_clone/Azure_new/MB-230-Dynamics365forCustomerService/../../releases/latest`
- **Are you a MCT?** - Have a look at our [GitHub User Guide for MCTs](#)
- **Need to manually build the lab instructions?** - Instructions are available in the [MicrosoftLearning/Docker-Build](#) repository

What are we doing?

- To support this course, we will need to make frequent updates to the course content to keep it current with the Azure services used in the course. We are publishing the lab instructions and lab files on GitHub to allow for open contributions between the course authors and MCTs to keep the content current with changes in the Azure platform.
- We hope that this brings a sense of collaboration to the labs like we've never had before - when Azure changes and you find it first during a live delivery, go ahead and make an enhancement right in the lab source. Help your fellow MCTs.

How should I use these files relative to the released MOC files?

- The instructor handbook and PowerPoints are still going to be your primary source for teaching the course content.
- These files on GitHub are designed to be used in conjunction with the student handbook, but are in GitHub as a central repository so MCTs and course authors can have a shared source for the latest lab files.
- It will be recommended that for every delivery, trainers check GitHub for any changes that may have been made to support the latest Azure services, and get the latest files for their delivery.

What about changes to the student handbook?

- We will review the student handbook on a quarterly basis and update through the normal MOC release channels as needed.

How do I contribute?

- Any MCT can submit a pull request to the code or content in the GitHub repro, Microsoft and the course author will triage and include content and lab code changes as needed.
- You can submit bugs, changes, improvement and ideas. Find a new Azure feature before we have? Submit a new demo!

Notes

Classroom Materials

It is strongly recommended that MCTs and Partners access these materials and in turn, provide them separately to students. Pointing students directly to GitHub to access Lab steps as part of an ongoing class will require them to access yet another UI as part of the course, contributing to a confusing experience for the student. An explanation to the student regarding why they are receiving separate Lab instructions can highlight the nature of an always-changing cloud-based interface and platform. Microsoft Learning support for accessing files on GitHub and support for navigation of the GitHub site is limited to MCTs teaching this course only.

title: Online Hosted Instructions permalink: index.html layout: home

Content Directory

Hyperlinks to each of the lab exercises and demos are listed below.

Labs

```
{% assign labs = site.pages | where_exp:"page", "page.url contains  
'/Instructions/Labs'" %} | Module | Lab | | --- | --- | {% for activity in labs  
%}| {{ activity.lab.module }} | {{ activity.lab.title }} | {% if  
activity.lab.type %} - {{ activity.lab.type }} | {% endif %} | {% endfor %}
```

Demos

```
{% assign demos = site.pages | where_exp:"page", "page.url contains  
'/Instructions/Demos'" %} | Module | Demo | | --- | --- | {% for activity in  
demos %}| {{ activity.demo.module }} | .{{ activity.demo.title }}. | {%  
endfor %}
```

lab: title: 'lab: Deploy Customer Service' module: 'Module 5:
Omnichannel'

Omnichannel for Customer Service

Instructor Demo 1

In this instructor led demo, you will be walking through how to configure some of the more common elements in Omnichannel for Customer Service. The Instructor led is particularly important for this class since, the students will be using a shared lab environment. The items that you will be configuring in this demo will be leveraged by students as they work through the Hands-on-Labs.

There is a pre-recorded click through demo that you can use during actual class room presentation, but it is highly recommended that you still walk through the demo to make sure that everything is configured for the environment that you are teaching out of at that time.

Before Class Begins

If Omnichannel for Customer service is not already set up in your environment, you will need to deploy the application and create some sample users that can be used as part of the course. If possible, this process should be completed at least the night before class since it can take several hours from Omnichannel for Customer Service to deploy.

Task 1: Deploy Omnichannel for Customer Service

1. Navigate <https://admin.powerplatform.microsoft.com>.
2. In the **Power Platform admin center**, expand **Resources** and, select Dynamics 365 apps.
3. Scroll down and select Omnichannel for Customer Service. *(If you have more than one, that's OK. They will all take you to the same spot.)* Click **Manage**.
4. Select **OK** to go to the Dynamics 365 apps admin page. If you are asked to sign in, use the credentials that you are currently logged in with.

You will be taken to an Omnichannel Provisioning consent screen. You will need to provide consent in order to ensure that the application can function properly.
5. Select the **Consent on behalf of your organization** check box and then select the **Accept** button.
6. In the admin center, click **Add Environment**:
7. You will be taken to Omnichannel setup screen. First, select the environment that you want to configure Omnichannel for customer service for. Click the **Next** button to advance to the next phase in the deployment process.
8. In the **Enable chat with Omnichannel** screen, set the **Add chat** slider to **Yes**. Click the **Next** button to advance to the next screen.
9. In the **Enable SMS with Omnichannel** screen, set the **Add SMS** slider to **Yes**. *(Accept the SMS Terms)*. Click the **Next** button to **Advance** to the next screen.
10. In the **Enable Social Channels with Omnichannel** screen, set the **Add Social** slider to **Yes**. Click the **Next** button to advance to the next screen.

11. In the **Enable Microsoft Teams with Omnichannel** screen, set the **Add Microsoft Teams** slider to **Yes**. Click the **Next** button to advance to the next screen.
12. On the final page of the Omnichannel setup screen, verify that all of the channels that you want to deploy to are set to be enabled. Click the **Finish** button to deploy Omnichannel in that environment.

****IMPORTANT:** *It can take several hours to deploy Omnichannel. It is highly recommended that you deploy before class, and then walk through the steps as part of the demo.*

Task 2: Deploy a Power Platform Portal

In order to deploy a chat channel, as well as configure settings related to portal functionality, you must have a portal that can be used to deploy the chat channel to. This could be a custom portal, or a Power Apps Portal. For our purposes, we will be deploying to a Power Apps Portal.

Before we can deploy a chat channel to the portal, we will need to create a portal that we can use to deploy the channel to.

1. Navigate to <https://make.powerapps.com>, and select **Create** from the site navigation.
2. Under **Start from template**, locate and select the **Customer self-service** template.
3. In the **Name** field, enter something like **Customer Self Service Portal**.
4. In the address field, enter a unique URL address for your portal.
 - If you cannot think of something, you can use something like the word omni followed by the month and year number as well as your initials.
For example: omni0120dab.
5. Click the **Create** button to start the process of provisioning your portal.

Note: *It can take from 10 to 30 minutes for your portal to spin up. While it is deploying, you can move begin with Task 1. Your portal should be ready when you are ready to deploy a chat channel to it.*


Instructor Demo1: Setup up Omnichannel Users & Queues

Scenario

Omnichannel for Customer Service's routing and distribution system relies heavily on Queues and Users to both route and distribute conversations as they come in from customers across different channels. Your organization primarily supports billing and service cases. While some agents are qualified to handle both billing and service-related support cases, most agents either specialize in one or the other. It is important to ensure the application understands not only what queues an agent can work on items from, but also that it is able to determine if the agent is able to handle additional work based on what they are currently working on.

To ensure that items are routed and distributed correctly, You need to create the necessary queues, assign users, and configure users to define how many items that can handle and when items can be assigned to them.

Task 1: Create new user accounts in Microsoft 365 Admin Center.

1. Open a new browser tab and navigate to <https://admin.microsoft.com>.
2. Expand the **Users** node, select **Active Users**, and click **Add a User**.
3. Complete the user as follows:
 - **First Name:** Alex
 - **Last Name:** Allman
 - **Display Name:** Alex Allman
 - **Username:** alexallman
4. Under password settings, select let me create the password,
 - Enter something like **pass\@word1** (*or some other password you would prefer*) for the password.
5. Ensure that **Require this user to change their password when they first sign in** is **NOT** checked, click the **Next** button.
6. To ensure that Alex can access everything he needs to, under **Assign a product license**, select the following options:
 - **Dynamics 365 Customer Engagement Plan**
 - **Dynamics 365 Customer Service Chat**
7. Click the **Next** button
8. Do not make any modifications under **Optional Settings**, click **Next**.
9. Click **Finish Adding** to complete the process.
10. Repeat steps 2  9 to add the two following users.

First name	Last name	User alias
Lilly	Michael	lilymichael
Penelope	Mayo	penelopemayo

Task 2: Assign security roles to define Omnichannel Users

Before users can access the necessary Omnichannel functionality, they will need to be assigned at least one of the omnichannel security roles based on what they will be doing. Here you will leverage security roles to assign access to omnichannel applications such as Omnichannel Administration, as well as Agent and Supervisory experiences.

1. In another browser tab, navigate to <https://admin.powerplatform.microsoft.com>.
2. Locate and select the environment that you deployed Omnichannel for Customer Service to. Click the **Settings** button to open the environment settings.
3. Expand **Users and Permissions**, select **Users**.
4. Select and open the user record associated with your name. Click the **Manage Roles** button. Assign the following Security Roles to your user account. Click **OK** when finished.
 - Omnichannel Administrator
 - Omnichannel Agent
 - Omnichannel Supervisor
5. Repeat step 5 to assign security roles to additional users based on the table below.

First name	Last name	User alias	Role
Alex	Allman	alexallman	Omnichannel Supervisor
Lilly	Michael	lillymichael	System Administrator, Omnichannel Administrator
Penelope	Mayo	penelopemayo	Omnichannel Agent

Task 3: Configure users in Omnichannel Administration

Items are distributed to agents based on their overall capacity. As items are assigned agents, their capacity is reduced based on the item that is assigned to them. When an agent's capacity falls below the amount required for a specific channel, no items of that channel type will be distributed to the agent.

As the agent completes items that capacity is added back to the agent. Additionally, agents can often only be assigned items based on their presence. To ensure this is handled properly, you must first configure the total capacity and presence information for each omnichannel agent.

1. If you do not currently have the Omnichannel Administration application open, open a new browser tab, and navigate to <https://home.dynamics.com>.
2. Under My **Apps**, locate and open the **Omnichannel Administration** app.
3. Using the application navigation menu, select **Users** from the **Users & Queues** group, locate and open your omnichannel user record.
4. In the **Nickname** field, enter your **First Name** and **Last** initial. (Ex. *Derik B.*)
5. On your user record, select the **Omnichannel** tab to display omnichannel specific settings.
6. Ensure that your capacity is set to **100**, and that your default presence is set to **available**.
7. Since both Alex and Penelope were defined as Agents, repeat steps 4 7 for both the **Alex Allman**, and **Penelope Mayo** user records.

Task 4: Setup and Configure Omnichannel Queues

As work items come in, they are first routed to a Queue before they will be distributed to an agent in that queue based on their current presence and available capacity.

1. Under **Users & Queues**, select **Queues**, and from the command bar, select the **New** button.
2. Configure the Queue as follows:
 - **Name:** Billing
 - **Priority:** 10
3. Click **Save** button to save the queue and leave it open.
4. In the **User (Agents)** sub-grid click **Add Existing User**.
5. Select **Alex Allman** and click **Add**.
6. Close the **Billing** queue.
7. In the Queue list, click the **New** button again.
8. Configure the Queue as follows:
 - **Name:** Service
 - **Priority:** 20
9. Click the **Save** button to save the queue and leave it open.
10. In the **User (Agents)** sub-grid, click **Add Existing** user
11. Select **your user record** and click **Add**.
12. Close the **Service** queue.
13. From the Omnichannel queue list, open the **Default Queue**.

14. In the **User (Agents)** sub-grid, click **Add Existing** user.

15. Select both **Alex Allman** and **your user record**, click Add.

Task 5: Mask Credit Card and Social Security numbers

1. In the **Omnichannel administration application**, under **Settings**, select **Data Masking Settings**.
2. Ensure that **Mask Private agent data from the customer** is set to **No**, and that **Mask private customer data from the agent** is set to **Yes**.
3. In the Masking rules sub-grid, select the **Credit Card** and **SSN** records. Click the **Activate** button and confirm activation of the 2 masking rules.

When this information is transmitted through chat conversations, Credit Card numbers and SSN numbers will be masked according to the settings defined.

Task 6: Create standard and extended Operating Hours for chat support

1. Under **Settings**, select **Operating Hours**, and from the list of **Active Operating Hours**, select the **New** button.
2. Configure the Operating Hour record as follows:
 - **Name:** Standard
 - **24/7:** No
 - **Start time (HH:mm):** 7:00
 - **End Time (HH:mm):** 18:00
 - **Work Days:** Mon, Tue, Wed, Thur, Fri
 - **Time Zone:** Select your Time Zone.
3. Use the drop-down menu on the at the bottom to select **Save & Create New**.
4. Configure the Operating Hour record as follows:
 - **Name:** 24/7
 - **24/7:** yes
5. Click the **Save and Close** button.
6. Your newly added Operating Hour records should resemble the image below.

! /home/ll/Azure_clone/Azure_new/MB-230-Dynamics365forCustomerService/Instructions/Demos/media/a5d9cf540ead1fd72e18fe1da3f1c239.png

Task 7: Configure Omnichannel Authentication and Capture Portal Navigation

1. Under **Settings**, select **Authentication Settings**, and from the **Active Authentication Settings** view, click the **New** button.
2. Configure the **Authentication** settings as follows:
 - **Name:** Support Portal Authentication
 - **Authentication Type:** OAuth 2.0 implicit flow
 - **Public key URL:** [https://
?your_power_app_portal_url.com/services/auth/publickey](https://?your_power_app_portal_url.com/services/auth/publickey). Example: [https://
?yourname.powerappsportals.com/services/auth/publickey](https://?yourname.powerappsportals.com/services/auth/publickey).
 - **JavaScript client Function:** auth.getAuthenticationToken

! /home/ll/Azure_clone/Azure_new/MB-230-Dynamics365forCustomerService/Instructions/Demos/media/880b0636ebc82b91820882d77f352277.png
3. Click **Save and Close**
4. Under **Settings**, select **Portal Navigation**.
5. Set **Portal Navigation** to **Yes**.

MB-230: Omnichannel for Customer Service

Instructor Demo 2


Task 1: Create a Chat Work Stream

Each channel that is deployed requires a Work Stream. Work Streams help to define how items will be routed and distributed. Through the work stream, you will define settings such as the capacity that is consumed, how items should be distributed, routing rules, and more. Since your organization would like to surface a live chat widget on their site, you will need to configure a work stream to facilitate it.

1. Under **Work Distribution Management**, select **Work Streams**, from the **Active Work Stream** list, click the **New** button.
2. Configure the Work Stream as follows:
 - **Name:** Standard Portal Chat
 - **Channel:** Live Chat
 - **Capacity:** 25
 - **Auto-Close after inactivity:** 5 minutes
 - **Assign Work item After Decline or Time Out:** 2 minutes
3. Under Work Distribution configure as follows:
 - **Work Distribution Mode:** Push
 - **Allowed Presences:** Available, Busy
4. Click the **Save and Close** button to Close the Work Stream.

Task 2: Create a Channel

Now that you have defined the Work Stream that will be used for Live Chats, you need to build the Chat Widget that you will surface to customers on a portal. When you architect a chat channel, you can define the specific behavior associated with it. This might include using authentication settings to identify the user and populate information in the solution based on who the user is. You can also define items such as attachment and transcript options and build pre-chat surveys that will be presented to customer prior to the initiation of the chat. This information can be used to help ensure that the appropriate data is populated to the agent in the solution when the conversation is initiated.

1. Under **Channels**, select **Chat**, from the **Active Chat Widgets** list, click the **New** button.
2. Configure the chat widget as defined below:
 - **Name:** Standard Chat
 - **Language:** English  United States
 - **Agent Display Name:** Nickname
 - **Authentication Settings:** Support Portal Authentication
 - **Work Distribution:** Standard Portal Chat
3. Configure File Attachments as follows:
 - **Enable file attachments for Customers:** Yes
 - **Enable file attachments for Agents:** Yes
4. Configure Chat Transcripts as follows:
 - **Allow download of transcript:** Yes
 - **Allow email of transcript:** No
5. Set **Show Position in Queue** to **yes**.

6. Your Chat widget screen should resemble the image below:

! /home/ll/Azure_clone/Azure_new/MB-230-Dynamics365forCustomerService/Instructions/Demos/media/5c22d0ecb10ba14a0442ce145a9fc136.png

1. Click the **Save** button to save the chat widget and leave it open.

Task 3: Modify the Design Elements of the Chat widget.

1. If necessary, open the **Standard Portal** Chat widget that you created in the previous Task. Select the **Design** tab.
2. To change the theme color that is used for the chat widget, select the color you want to use from the **Theme Color** drop down menu.
3. Change the **Title** to **Talk to Agent**.
4. Leave the **Subtitle** as **We💎💎💎re Online**
5. In the **Operating Hours** field, select the **24/7** record you created earlier.
6. If necessary, click the **Save** button in the lower right corner of the screen to save you changes and leave the record open. *(You do not need to save your changes, as the changes will be auto-saved after 30 seconds.)*

Task 4: Configure a Pre-Chat Survey

When customers initiate a chat from the portal, you can present the user with a pre-chat survey to capture attritional information that can assist the agent in resolving the customers issue. Additionally, answers to pre-chat survey questions can help to ensure that the correct information is presented in the Customer Summary screen when it is loaded in the application. This might include capturing the account or contact name, or case number when they are referencing an existing case.

1. If necessary, open the **Standard Portal** Chat widget. Select the **Pre-Chat** survey tab.
2. Set the **pre-chat survey** field to **Yes**.
3. In the **Pre-chat unauthenticated** questions sub-grid, select **Add Question**.
4. Configure the Question as follow:
 1. **Question Name:** CaseNumber
 2. **Question Text:** What Case Number is this related to?
 3. **Answer Type:** Single Line
 4. **Mandatory:** No
5. Click **Save and Close** to close the question

Task 5: Deploy your Chat widget to a Portal

As you build the chat channel, the application generates a Code Snippet that is used to deploy the chat widget to your portal location.

1. If you do not already have it open in a different tab, open a new browser tab, and navigate to <https://make.powerapps.com>
2. In a separate tab have the **Omnichannel Administration** application open.
3. In the **Power Apps Admin** screen, select **Apps** and open the **Dynamics 365 Portals App**.
4. In the **Dynamics 365 Portals App**, select **Content Snippets** under **Content**.
5. In the **Search for Records Box**, enter **Chat** and hit enter. Open the **Chat Widget Code** content snippet for your customer service portal.
6. In the **Value (HTML)** field, select the **HTML** tab.
7. Switch to tab that contains the **Omnichannel administration** application.
8. Under **Channels > Chat**, open the **Standard Chat Channel** you created earlier.
9. Locate the **Widget snippet code** field. Highlight and copy the entire script from that field.
10. Switch back to the **Chat Widget Code** item in the other tab where you have the **Dynamics 365 Portal Application** open.
11. Paste the value into the value field. **Important:** *Make Sure that the HTML tab is selected.*
12. To ensure that the entire script was pasted in correctly, select the **Designer** tab. If the screen is empty the script was correctly copied

into the application. If you see the script text in the field, it is likely the entire script was not pasted into the field.

Note: *If you are using Power Apps portals, after the script has been deployed from the Chat Widget Code snippet, it can take up to 15 minutes before you will see the chat widget available on your portal.*

Task 6: Verify you Chat widget has been deployed

1. If you do not already have it open in a different tab, open a new browser tab, and navigate to <https://make.powerapps.com>.
2. Navigate to Apps and locate the Customer Self-Service Portal that you created in the previous exercise.
3. Open the **Customer Self Service Portal**.
4. Verify that your chat widget is being displayed on the Portal.

Tip: *If you are still not seeing the chat widget in the portal, look at the working hours associated with the chat to verify that you are within the work hour defined.*

MB-230: Omnichannel for Customer Service

Instructor Demo 3




In this Demonstration you will be creating and registering a Power Virtual Agents bot, that your students will use when working through the labs.

Task 1: Create a Power Virtual Agents chatbot

1. Navigate to <https://powerva.microsoft.com/>. (You should verify prior to class the PVA has been added to the environment that you are working with.)
2. Using the navigation menu at the top, select the Bot Icon, and click New Bot.
3. Enter ILT OCS BOT for Name, select English for the Language, select your environment, and click Create. Make sure you do not have the default environment selected.
4. Wait for the bot to be created. It might take a few minutes to complete.
5. Click Explore Bot, If prompted.
6. Wait for the bot to be created. It might take a few minutes to complete.
7. Select Topics, and click + New topic
8. Complete the new top as shown in the image below:
9. Click the Save button to save the bot and leave it open. Once it is saved, click the Go to authoring canvas button.
10. In the Message node, enter the following text: I💎💎💎d be happy to help you with that.
11. Select the Add Node button, from the list that appears select Ask a question.
12. In the Ask a Question field, enter: Which location are you interested in?
13. Add the following options:
 - Seattle
 - Redmond

14. Under the Seattle condition, add a message node with the following text.

Our Seattle location is open:




Mon    Fri: 8:00 AM to 9:00 PM

Saturdays: 10:00 AM to 7:00 PM

Sundays: 12:00 PM to 5:00 PM

15. Under the Redmond condition, add a message node with the following text.

Our Redmond location is open:

Mon    Fri: 9:00 AM to 8:00 PM

Saturdays: 10:00 AM to 5:00 PM

Sundays: Closed

16. **Save** the Topic

17. Select **Topics** again, open the **Escalate** topic, and select **Go to authoring canvas**.

18. Edit the message node to read: **No Problem, I will take you there now**.

19. Add a **Transfer to Agent** node with the following text: **This customer would like to talk to you**.

20. **Save** the Topic

21. Using the navigation on the left, select **Publish** and click the **Publish** button to publish the bot.

Task 2: Create an Azure Active Directory Application

Let's jump straight into creating the identity. If you run into a problem, check the [required permissions](#) to make sure your account can create the identity.

1. Open a new tab in the same browser session, and navigate to <https://portal.azure.com>
2. If prompted to login, sign in with your credentials.
3. Under Azure services, select **Azure Active Directory**.
4. On the left side of the screen under manage, select **App registrations** can click the **New registration** button.
5. Configure the application as follows:
 - **Name:** Virtual Agent Bot
 - **Supported Account types:** Accounts in this organizational directory only
 - **Redirect URI:** Leave empty for now.
6. Once finished, select the **Register** button.

You have successfully created an Azure AD application and service principal that can now be used with Omnichannel.

Task 2: Assign the application to a role

To access resources in your subscription, you must assign the application to a role. Decide which role offers the right permissions for the application. To learn about the available roles, see [RBAC: Built in Roles](#).

You can set the scope at the level of the subscription, resource group, or resource. Permissions are inherited to lower levels of scope. For example, adding an application to the Reader role for a resource group means it can read the resource group and any resources it contains.

1. In your Azure portal, click in the **Search** bar at the top of the screen.
2. In the search bar search for and select **Subscriptions**, or select **Subscriptions** on the **Home** page.
3. Select the particular subscription to assign the application to.

*If you don't see the subscription you're looking for, select **global subscriptions filter**. Make sure the subscription you want is selected for the portal.*

4. Locate and select **Access control (IAM)**, and under **Add a role Assignment**, click the **Add** button.
5. Complete as follows:
 - **Role:** Contributor
 - **Assign Access to:** Azure AD User, Group, or Service Principal
 - **Select:** Power Virtual Agent Bot
6. Once you see Power Virtual Agent Bot in under Selected Members, click the **Save** button.

Task 3: Configure hand-off in the Power Virtual Agents App

1. Navigate back to the tab where you have your Power Virtual Agents bot open.
2. Select the **Settings** icon, and then select **Transfer to agent**.
3. Select the **Dynamics 365 Omnichannel for Customer Service** tile, click **Next** on the Privacy screen.
4. Switch the browser tab where your Azure Portal is opened.
5. In the search field, type **Azure Active Directory** and open the **Active Directory**.
6. Under **Manage**, select **App Registrations**, and open the **Virtual Agent Bot** registration you created earlier.
7. Copy the **Application (client) ID**
8. Paste the Application ID it into the **Power Virtual Agents Application ID** field. Select **Next**.
9. Power Virtual Agents uses a [Teams channel](#) to communicate with Omnichannel for Customer Service. If a Teams channel is not enabled, a Teams channel will be enabled when you select **Next**.
10. Select the environment where your Omnichannel for Customer Service instance is provisioned.
11. Once everything has finished provisioning, you will be taken to a summary screen. On the Summary screen, select the **Go to Omnichannel for Customer Service** link to [continue configuring the bot connection in Omnichannel for Customer Service](#).
12. The application will open to your newly created Virtual Agent Record.
13. Under **Omnichannel Queues**, click **Add Existing Queue**.

14. Select the **Default Queue** and click the **Add** button.

MB-230: Connected Customer Service - Instructor Demo

Instructor Demo 1

In this instructor led demo, you will be walking student through the process of deploying and configuring an IoT Central application that can be potentially be used in conjunction with a Connected Customer Service implementation. In this exercise, you will create an IoT central application and add two devices.

Task 1: Create an IoT Central Application

1. Navigate to [Azure Portal](#) and click + **Create a resource**.
2. Search for iot central and select **IoT Central Application**.
3. Click **Create**.
4. Enter **smart-trash-fl** (replace **fl** with the first and last initials of your alias ie AS for alans) for **Resource Name**, provide a unique **Application URL** (use smarttrashMMDDYYInitials), select your subscription, and click **Create new Resource group**.
5. Enter **smarttrashcontainerlab** for **Name** and click **OK**.
6. Select **Standard 1** for **Pricing plan**, select **Connected Waste Management** for **Template**, select your **Location**, and click **Create**.
7. Wait for the deployment to complete and click **Go to resource**.
8. Open the application by clicking on the IoT Central Application URL.
9. Select Devices. You should see one device group named **Connected Waste Bin** that has two sample devices.
10. Click + **New**.
11. Select **Connected Waste Bin** for **Template type**, enter **19th Ave Location** for **Device name**, set **Simulate this device** to **Yes**, and click **Create**.
12. Click to open the **19th Ave Location** you just created.
13. Select the **Cloud Properties** tab, go to the **Trash bin install location** section, enter Microsoft building in the **Address** field, and select **Microsoft Building 4** from the suggested addresses.
14. The GPS coordinates should get auto filled. Click **Save**.

15. Select **Devices** and click **+ New** again
16. Select **Connected Waste Bin** for **Template type**, enter **35th St Location** for **Device name**, set **Simulate this device** to **Yes**, and click **Create**.
17. Click to open the **35th St Location** you just created.
18. Go to the **Trash bin install location** section, enter Microsoft in the **Address** field, and select **Microsoft Main Campus** from the suggested addresses.
19. The GPS coordinates should get auto filled. Click **Save**.
20. Do not navigate away from this page.

Task 2: Tour IoT Central Application

In this task, you will tour the IoT Central application.

1. Select **Dashboard**.
2. Templates come with a default dashboard, you can edit the default dashboard or create a new dashboard.
3. The default dashboard is not showing information about the devices you added. Click **Edit**.
4. Go to the map tile and click **Configure**.
5. Go to the **Configure** pane and click on the **Devices** dropdown.
6. Select the all the devices and click **Update**.
7. Click **Save**.
8. The map tile should now show all four location. The locations are simulated and refreshed often.
9. You may edit other tiles.
10. Select **Devices** and click to open the **35th St Location** device.
11. Select the Cloud properties. Here, you can provide more information about the device and edit the device alert thresholds.
12. Select the Diver dashboard tab. This is a device specific dashboard that comes with the connected waste bin template.
13. Select the **Device properties** tab. This tab shows information including the device model, manufacturer, type, and location.
14. Select the **Raw data** tab. This tab shows raw unprocessed data received from the in the last 7 days. Click to expand one of the records.
15. Click **Filter**.

16. You can show all message types, just telemetry message type, or Property message type. Click **Edit time range**.
17. Click on the **Time range selection** dropdown. You can select to show one of the ranges provided or create a custom range.
18. Select **Custom**.
19. Here, you can create a custom range. Click **Cancel**.
20. Do not navigate away from this page.

Task 3: Set bin full alert threshold

In this task, you will set the minimum and maximum bin full threshold.

1. Select **Device Templates** and click to open the **Connect Waste Bin template**.
2. Templates come with a default dashboard, you can edit the default dashboard or create a new dashboard.
3. Select **Cloud properties**.
4. Locate the **Bin full alert threshold** and click **Expand**.
5. Enter **10** for **Min value**, **50** for **Max value**, and click **Save**.
6. Click **Publish** to publish your changes.
7. Click Publish again to confirm.

MB-230: Connected Customer Service - Instructor Demos

Instructor Led Demo 2

In this instructor led demonstration, you will create a Power Automate flow that will get triggered on alert rule fired. The flow will create an IoT alert record in Connected Customer Service.

Task 1: Modify alert rule

In this task, you modify the bin full alert rule.

1. Navigate to [Azure Portal](#) and click **All resources**.
2. Search for smart and click to open **smart-trash** application you created.
3. Click on the **IoT central application URL**.
4. Select **Rules** and click to open the **Bin full alert**.
5. Enable the alert and click **Save**.
6. Scroll down to the **Condition** section and examine in what condition the alert will get fired. Bin full alert will get fired when the Fill level in more the 50, this is the max value you set for the Bin full alert threshold you set in exercise 1.
7. Go to the **Actions** section and select **Microsoft Power Automate**.
8. Click **Go**.
9. Click on the **When a rule is fired** trigger.
10. Click **Sign in**.
11. Sign in with the azure credentials.
12. Select **smart-trash** for **Application**, select **Bin full alert** for **Rule**, rename the trigger **When bin full alert is fired**, and click **+ New step**.
13. Search for create new record and select **Create a new record Common Data Service (current environment)**.
14. Click **Show advanced options**.
15. Select **IoT Alerts** for **Table name**, click on the **Description** field and select **Device name** from the Dynamic content pane.

16. Type : **Surpassed the maximum fill level threshold, current fill level is** and select the second **Waste Bin monitors Fill level** from the Dynamic content pane.
17. Click on the **Device ID** field and select **Device ID** from the Dynamic content pane.
18. Rename the step **Create new IoT alert**.
19. Name the flow **Create bin full IoT alert** and click **Save**.

Task 2: Test flow

In this task, you will test the IoT alert flow you created.

1. Navigate to [Power Apps maker portal](#) and make sure you are in the correct environment.
2. Select **Apps** and click to launch the **Connected Field Service** application.
3. Select **IoT Alerts** and **Refresh** the view until you see an alert record.
4. Click to open the alert record.
5. The **New IoT Alerts** tile should show at least 1 record. Click on the tile.
6. The alerts should look like the image below. Close the popup window.
7. Select **Devices** and click to open the test device.
8. Select **Alerts** tab. You should see the alert as a related record here.
9. Select **Customer Assets** and click to open the test record you created.
10. Click on the **Related** tab and select **IoT Alert**
11. You should see the alerts listed as related records here.
12. Select the **Summary** tab. The alerts should also show on the **New IoT Alerts** tile.
13. Go back to the IoT Central application, select **Rules** and click to open the **Bin full alert**.
14. Disable the rule and click **Save**. The maximum threshold is set to 50 which is too low, this will cause you to get too many alerts and consume a lot of resources.

MB-230: Customer Service Insights

Instructor Demo 1

In this instructor led demo, you will be walking students through setting up and working with Customer Service Insights. Because Customer Service Insights typically requires additional licensing, students will not be able to get the full Customer Service Insights on their own. This demo will provide them the opportunity to see Customer Service Insights in action. You need to ensure that you have a Customer Insights Subscription to show this information

There is a pre-recorded click through demo that you can use during actual class room presentation, but it is highly recommended that you still walk through the demo to make sure that everything is configured for the environment that you are teaching out of at that time.

Before Class Begins

You should verify that Customer Service Insights is installed and attached to the Dynamics 365 Customer Service environment that you are working with. You can do that by navigating to <https://CSI.ai.dynamics.com> and verifying that the sample work space is there. That is all you need to do with the environment at this point.

Task 1: Create a Customer Service Insights workspace


1. Open an in-private browser and navigate to <https://CSI.ai.dynamics.com>. *(If prompted for credentials, use the same credentials that you have been using for the training environment)*
2. Using the Navigation at the top of the application, select the **Workspaces** icon. From the list of available environments, select add workspace.
3. In the **Connect your data** screen, select **Dynamics 365**.
4. From the available list of environments, select the environment that contains the case related data that you want to attach to.
5. When the **Map your data** screen appears, click the **Get Started** button.
6. In the **Find case records** screen, ensure that **Case** is selected and click **Next**.
7. In the **Map case records** screen, all the **Destination** fields should be automatically mapped to the appropriate **Source** fields. *(If not, map each Destination field to the Source Field that matches the Destination field name exactly.)* Once complete, click the **Save** button.
8. The application will examine your cases and begin to create a workspace with topics. Once completed you will be taken to your new workspace.

IMPORTANT: *It can take awhile to populate all the data in your workspace. While that is taking place, we will have you work with a sample environment to walk through navigating through the application.*

Task 2: Take students on a tour of Customer Service Insights

In this demo you will be walking students through the navigation user interface of the customer service insights application. During the tour, call out specific items that they should be aware of, in addition to how the different elements might impact what they are doing in the application.

1. In you are not already in **Customer Service Insights**, navigate to <https://CSI.ai.dynamics.com>
2. Using the **Navigation** at the top of the application, select the Workspaces icon. From the list of available environments, select sample environment.
3. After the sample environment loads, select the **Home** screen if necessary. This is the main screen that provides key organizational details for them. Call out to the students that you can filter the results that are being displayed to show over the last **24 Hours**, **7** or **30 days**.
4. Each area will contain a light bulb that will provide the use with details as to why that information is important. Next to **Topics impacting resolution time**, select the **light bulb icon**. The why this matted fly out will open that contains details why the data matters and any related recommendations. (*This helps better use that information to drive decisions.*)
5. Under **Topics to watch**, select the topic that is listed as the **#1 topic to watch** (*Likely User needs help with payments.*) Before selecting call out the relevant details such as the number of cases associated with it as well as the drivers.
6. You can dive into the details related to a topic by selecting the filters at the top of the screen. Click the **Channel** dropdown and select **Phone** to filter the details for only items coming from the Phone Channel.
7. Click the **Product** drop down and select **Contoso Nutrition**. Call out to students how the data is further filtered to reflect Contoso Nutrition.

8. Remove the product filter by hovering your mouse next to the product drop down and selecting the **eraser** icon.
9. Each Customer Service Insights visual such as lists and charts will have different slicers that impact how the data is presented. Click on the **filter** icon to display the list of filters that are impacting the results of that visual.
10. Hover over and select the **ellipsis** to provide a list of options that can be done such as modifying the sorting and exporting data. From the list that appears, select the **spotlight** icon. The application will spotlight the visual that you are currently working with.
11. Click the **ellipsis** and select the **spotlight** again to remove the spotlight from the view.
12. Locate and select **Cases** at the top of the Topic page to display the actual the cases that are behind the analytics.
13. Click in the **search** field and enter the text **User can**  **t**. Notice how each of the cases that contain that text are displayed. Hover over one of the cases show the **thumbs up** and **thumbs down** icons. These are used to indicate whether the case was correctly placed in the right topic.
14. Select **KPI summary** from the left navigation. Call attention to the filter list at the top. Notice that the **Channel** filter we applied earlier is still applied. Use the **eraser** icon to remove the Channel filter.
15. In the middle of the KPI Summary screen, there is a visual that shows **Case Breakdown**, **Case Priority**, and **Case Channel** details. In that visual, locate the **Web** column under **Case Channel** stacked column chart. Use your mouse to hover over the totals for each color.
16. Select the Web bar with the **Status** of **active**. Notice how the rest screen changes based on the new filter details. Click the web active bar again to remove the filter and display all the data.
17. Select Customer Satisfaction from the left navigation. Call attention to the **customer satisfaction drivers** chart. Call out to students how the **Surveys Completed** and **Avg CSAT** help to contribute to the overall **impact**.

18. Select **Resolutions** from the left navigation. Call attention the topics and avg resolve time per topic.

lab: title: 'Lab: Validate lab environment' module: 'Module 0: Course introduction'

Module 0: Course introduction

Practice Lab - Validate lab environment

Scenario

In this Module 0 lab, you will validate that your classroom tenant is working as expected. You will access your individual credentials, record your `???` alias `???`, and open the Dynamics 365 model-driven application that we will be using throughout the course.

Important Note: This lab will provide you with an actual Dynamics 365 tenant and licenses for the Power Platform applications you will be using in this course. Please be aware that the Power Platform is evolving all the time. The instructions in this document may be different from what you experience in your actual tenant. It is also possible to experience a delay of several minutes before the virtual machine has network connectivity to begin the labs.

Exercise 1 - Access the Dynamics 365 application

Task 1 Log into the Power Platform admin center

1. Access <https://admin.Powerplatform.microsoft.com> and log in with your user credentials.
2. Record your user credential up to the @ symbol on a scratch piece of paper or in Notepad. This will be your lab alias that you will use to differentiate the data you create within the shared Dynamics 365 organization.

Important: Please be aware that this tenant and the Dynamics 365 organization will be shared with the other students in your classroom, like employees would share a tenant when using the Dynamics 365 instance belonging to their organization. Do not use any PII (personally identifiable information) when creating records. It is also good practice to use your username prefix (ex., **mollyc**) in front of all records, data, apps, flows, etc. you create.

1. Feel free to explore the Power Platform admin center but **do not make any changes**.

Task 2 Access the Dynamics 365 application

1. Expand the grid button at the top left of the screen, directly to the left of **Power Platform admin center**. Select **Environments**.
2. Select the **Contoso (Production)** environment.
3. Go to the environment URL.
4. From the list of available Dynamics 365 apps, select **Customer Service Hub**.
5. Spend a few minutes exploring the application.

lab: title: 'Lab: Install the app' module: 'Module 1: Customer Service Overview'

Module 1: Customer Service Overview

Practice Lab 1 Navigate to the app

Scenario

You are a business analyst working on the Dynamics 365 for Customer Service implementation for your company, City Power & Light. You need to install the Customer Service application in your environment.

Exercise 1 Navigate to Dynamics 365 Customer Service Hub

In this exercise, you will install the Dynamics 365 Customer Service Application and then install sample data.

Task 1 Navigate to Customer Service Hub Application

1. Go back to
2. Select **Customer Service Hub** from the list of published apps.

3. You are now directed to the Dashboard view.

lab: title: 'Lab: Creating cases' module: 'Module 2: Case Management'

Module 2: Case Management

Practice Lab 1 Creating cases

Scenario

You are a customer service manager at City Power & Light who has been tasked with trying the new case functionality before rolling it out to your users. In this lab, you will create a case and create a phone call associated with that case.

Exercise 1 Create Cases

In this exercise, you will create a Case record, you will also add a Phone Call activity and then convert the activity to Case.

Task 1 Create Case

1. Navigate to
2. Click **Dynamics 365** drop-down arrow and select **Customer Service Hub** application.
3. Click on **Cases** in the **Service** section of the sitemap.
4. Click **+ New Case** located on the command bar.
5. Enter *[your prefix ex. mollyc]+ Defective Screen* for **Case Title**, select **Default Subject** for **Subject**, type *your user name* in the **Customer** field, click on the lookup button and select *your user*.
6. Click **Save**.

Task 2 Create Phone Call Activity

1. Go back to your **Customer Service Hub** application.
2. Click **Cases** from the **Service** section of the sitemap
3. Open the case you just created
4. Click the **Related** tab and select **Activities**
5. Click on the **+New Activity drop-down** button and select **Phone Call**.
6. Enter *[your prefix ex. mollyc]+ Defective Screen* for **Subject**.
7. Ensure your user record is set for **Call From** and **Call To**
8. Select **Incoming** for **Direction**, enter **15 Minutes** for **Duration** and click **Save & Close**

lab: title: 'Lab: Creating queues' module: 'Module 2: Case Management'

Module 2: Case Management

Practice Lab 2 Creating queues


Scenario

You are a customer service manager at City Power & Light. You need to create queues for the customer service representatives to use for processing cases. In this lab, you will create a create multiple queues.

Exercise 1 Create Queues

In this exercise, you will create four Queues.

Task 1 Create Queues

1. Go back to your **Customer Service Hub** application.
2. Click on the  button located below the **Site Map** button and select **Service Management**.
3. Click on the **Sitemap** button in the bottom left and select **Queues**.
4. Click **+ New** located on the command bar.
5. Enter *[your prefix ex. mollyc]+ Support* for **Name** and select **Public** for **Type**.
6. Click **Save**.
7. Click **+ New**.
8. Enter *[your prefix ex. mollyc]+ Bronze* for **Name** and select **Public** for **Type**.
9. Click **Save**.
10. Click **+ New**.
11. Enter *[your prefix ex. mollyc]+ Silver for Name and select Public for Type**.
12. Click **Save**.
13. Click **+ New**.
14. Enter *[your prefix ex. mollyc]+ Gold for Name and select Public for Type**.
15. Click **Save**.

16. Click **Queues** under the **Case Settings** section.

17. You should now see a Private Queue that was created by default and the four Public Queues you created. (note: you might see other queues created by other students in your class)

lab: title: 'Lab: Resolving cases' module: 'Module 2: Case Management'

Module 2: Case Management

Practice Lab 3 Resolving cases

Scenario

You are a customer service manager at City Power & Light who has been tasked with trying the new case resolution and reactivation functionality before rolling it out to your users. In this lab, you will resolve a case and reactive that case.

Exercise 1 Resolve Cases

Task 1 Resolve Case

1. Go to your **Customer Service Hub** application.
2. Click on the **Sitemap** Button and select **Service**. Then select **Cases** under the **Service** section.
3. Locate and open the [your prefix ex. mollyc]+ **Defective Screen** record you created.
4. Click on the **Identify** stage of the **Business Process Flow**.
5. Click **Next Stage**.
6. The **Business process Flow** will advance to the **Research** stage. Click on the **Research** stage and click **Next Stage** again.
7. The **Business process Flow** will advance to the **Resolve** stage. Click on the **Resolve** stage and click **Finish**.
8. Click on the **Related** tab and select **Activities**
9. Click the [your prefix ex. mollyc]+ **Defective Screen** Activity you created.
10. Click the **Mark Complete** button located in the command bar. You need to complete any open Activities associated with a Case before you resolve the Case. Otherwise, the Activities will be cancelled.
11. Click on the **Resolve Case** button located in the command bar. You may need to click the ellipsis to see it.
12. Select **Problem Solved** for **Resolution Type** and enter **Sent Replacement** for **Resolution**.
13. Enter **30 minutes** for **Billable Time**, enter **Sent replacement Screen** for **Remarks**, and click **Resolve**.

Task 2 Reactivate Resolved Case

1. Click **Cases** under the **Service** section.
2. Change the **View** from **My active Cases** to **Resolved Cases**.
3. Open the Case you resolved in task 1.
4. Click on the **Reactivate Case** button located in the command bar.
5. Change the **Case Title*** *to [your prefix ex. mollyc]+ Screen Not Received** in the details tab.

6. Click Save & Close.

lab: title: 'Lab: Entitlements and templates' module: 'Module 3: Service Level Management'

Module 3: Service Level Management

Practice Lab 1 Entitlements and templates

Scenario




As a customer service manager at City Power & Light, you need to create entitlements and entitlement templates to manage complex service offerings and guide your team in processing cases from various channels. In this lab, you will create an entitlement with entitlement channels. You will also create an entitlement template and create an entitlement from the template.

Exercise 1 Entitlements

In this exercise, you will create an entitlement for your user, this entitlement will allow you to create 50 case through Email channel, 30 Cases through Web channel, 10 Cases each for Twitter and Facebook channels.

Task 1 Create Entitlement

In this task, you will create an entitlement with 100 total terms for Adventure Works customer.

1. Navigate to <wllab006.crm.dynamics.
2. Open **Customer Service Hub**.
3. Click on the **Sitemap** button in the bottom left corner and click **Service Management**.
4. Click on **Entitlements** in the **Service Terms** section.
5. Click **New**.
6. Enter [your prefix ex. mollyc]+ **Entitlement 1** for **Name**, select *your user* for **Primary Customer**, select today   s date for **Start Date**, and select a year from today for **End Date**.
7. Select **Yes** for **Restrict Based on Entitlement Terms**.
8. Select **Number of Cases** for **Allocation Type**, select **Case Creation** for **Decrease Remaining On**, and enter **100** for **Total Terms**.
9. Click **Save**. DO NOT navigate away from the Entitlement form.

Task 2 Add Channels to the Default Entitlement

In this task, you will add entitlement channels to the default entitlement and then activate the entitlement.

1. Go to the **Entitlement Channel** sub-grid, click on the ellipsis button and select **New Entitlement Channel**.
2. Select **Email** for **Name**, enter **50** for **Total Terms** and click **Save & Close**.
3. Click on the ellipsis button and select **New Entitlement Channel**.
4. Select **Web** for **Name**, enter **30** for **Total Terms** and click **Save and Close**.
5. Click on the ellipsis button and select **New Entitlement Channel**.
6. Select **Facebook** for **Name**, enter **10** for **Total Terms** and click **Save and Close**.
7. Click on the ellipsis button and select **New Entitlement Channel**.
8. Select **Twitter** for **Name**, enter **10** for **Total Terms** and click **Save and Close**.
9. Click **Activate**.
10. Confirm the activation.

Task 3 **Test the Entitlement**

In this task, you will test the default entitlement for Adventure Works.

1. Click on the **Sitemap** button and select **Service**.
2. Click **Cases**.
3. Click **+ New Case**.
4. Enter *[your prefix ex. mollyc]+ Audio System Setup Issues* for **Case Title**, select *your user* for **Customer**, select **Email** for **Origin**, select *[your prefix ex. mollyc]+ Entitlement 1* for **Entitlement** and click **Save**.
5. Click **+ New**.

6. Enter *[your prefix ex. mollyc]+ Defective Speaker* for **Case Title**, select *your user* for **Customer**, select **Facebook** for **Origin**, select *[your prefix ex. mollyc]+ Entitlement 1* for **Entitlement** and click **Save**.
7. Scroll to the **Entitlement** field and click on the *[your prefix ex. mollyc]+ Entitlement 1*
8. Go to the **Entitlement Terms** section and make sure you have **98 Remaining Terms**.
9. Go to the **Entitlement Channel** sub-grid and make sure you have **49 Remaining Terms** for **Email**, **9 Remaining Terms** for **Facebook**, **10 Remaining Terms** for **Twitter**, and **30 Remaining Terms** for **Web**.

Exercise 2 Entitlement Templates

In this exercise, you will create an entitlement template that will have 20 free terms and the customer will be able to select the channel they prefer during the entitlement creation.


Task 1 Create Entitlement Templates

In this task, you will create an entitlement template with 20 terms.

1. Click on the **Sitemap** button and select **Service Management**.
2. Click **Entitlement Templates**.
3. Click **+ New**.
4. Enter *[your prefix ex. mollyc]+ 20 Free Terms* for **Entitlement Template Name**, select **Yes** for **Restrict on Entitlement Terms**, select **Number of Cases** for **Allocation Type**, select **Case Creation** for **Decrease Remaining On**, enter **20** for **Total Terms** and click **Save**. DO NOT navigate away from this page.

Task 2 Create Entitlement from Template

In this task, you will create 20 phone call only entitlement from the entitlement template you created.

1. Click **Entitlements**.
2. Click on the **V** chevron button next to the **New** button and select **From Template**.
3. Select *[your prefix ex. mollyc]+20 Free Terms* for **Entitlement Template** and click **Select**.
4. Some of the fields will be auto-filled from the template.
5. Enter *[your prefix ex. mollyc]+ Phone Call Only Terms* for **Name**, select *your user* for **Primary Customer**, select today s date for **Start Date**, select a year from today for **End Date**, and click **Save**.

6. Go to the **Entitlement Channel** sub-grid, click on the ellipsis and select **+New Entitlement Channel**.
7. Select **Phone** for **Name**, enter **20** for **Total Terms** and click **Save & Close**.
8. Click on the ellipsis and select **+New Entitlement Channel**.
9. Select **Email** for **Name**, enter **0** for **Total Terms** and click **Save & Close**.
10. Click on the ellipsis and select **+New Entitlement Channel**.
11. Select **Web** for **Name**, enter **0** for **Total Terms** and click **Save & Close**.
12. Click on the ellipsis and select **+New Entitlement Channel**.
13. Select **Facebook** for **Name**, enter **0** for **Total Terms** and click **Save & Close**.
14. Click on the ellipsis and select **+New Entitlement Channel**.
15. Select **Twitter** for **Name**, enter **0** for **Total Terms** and click **Save & Close**.
16. Click **Activate**.
17. Confirm activation. DO NOT navigate away from this page.

Task 3 Test the Entitlement

In this task, you will test the entitlement you created from the entitlement template.

1. Click on the **Sitemap** button and select **Service**.
2. Click **Cases**.
3. Click **+ New Case**.
4. Enter *[your prefix ex. mollyc]* + *Missing Parts* for **Case Title** and select *your user* for **Customer**.

5. Select **Phone** for **Origin**, select *[your prefix ex. mollyc]+ Phone Call Only Terms* for **Entitlement** and click **Save**.
6. Click **+ New**.
7. Enter *[your prefix ex. mollyc]+ wrong cables* for **Case Title** and select **Jim Glynn** for **Customer**.
8. Select **Web** for **Origin**, select *[your prefix ex. mollyc]+Phone Call Only Terms* for **Entitlement** and click **Save**.
9. Scroll down to the **Entitlement** field and click **Phone Call Only Terms**.
10. Click **Save**. You will get an error telling you that there are no available terms.
11. Click **OK**.
12. You should get the same error if you select Email, Facebook or Twitter for Origin.
13. Select **Web** for **Origin** and clear the **Entitlement** field.
14. Click **Save**.
15. Since you didn't select the **Phone Call Only Terms** entitlement, the Case will now be created.
16. Click on the **Sitemap** button and select **Service Management**.
17. Click on the **Site Map** button and select **Entitlements**.
18. Click to open the *[your prefix ex. mollyc]+ Phone Call Only Terms*.
19. Make sure you have **19 Remaining Terms** and **19 Phone** channel **Remaining Terms**.

Module 4: Knowledge Management

Practice Lab 1 Create knowledge articles

Scenario

As a customer care coordinator at City Power & Light, you are responsible for instructing the customer service team and providing them with troubleshooting articles to support case resolution. You need to create a knowledge article within Dynamics 365 for Customer Service. In this lab, you will create a knowledge article, walk through the publishing process and then revise that article.

Exercise 1 Knowledge Management

In this exercise, you will create, approve, publish, and revise an internal Knowledge Article for missing parts.

Task 1 Create Internal Article

In this task, you will create an internal Knowledge Article for missing parts.

1. Navigate to <wwllab006.crm.dynamics.
2. Select **Customer Service Hub**.
3. Click on the **Sitemap** button and select **Service**. Select **Knowledge Articles** under the **Knowledge** section
4. Click **+ New**.
5. Enter *[your prefix ex. mollyc]+ Missing Parts* for **Title**, enter **missing, parts** for **Keywords** and click **Save**.
6. Go to the **Content** area and make sure you have the **Designer** tab selected.
7. Type *[your prefix ex. mollyc]+ Purpose & Scope*.
8. Click on the **Paragraph Format** selector and select **H2**. This option will only appear if your screen is fully expanded.
9. Hit the \<**Return**> key to start a new line. The **Format Selector** should change back to **Normal**.
10. Type the paragraph below.

Use procedure below to resolve Phone call Cases that are related to missing parts.
11. Hit the \<**Return**> key to start a new line.
12. Click on the **Paragraph Format** selector and select **Heading 2**.

13. Type **Procedure**.
14. Hit the \<**Return**> key to start a new line.
15. Go to the ribbon and click **Insert/Remove Numbered List**. This action will insert numbered list.
16. Provide the steps below.
 1. Get Order Number for Customer.
 2. Locate Order record.
 3. Locate the product in question and open it.
 4. Is the product the Customer received listed?
 5. If yes, Send the Customer a replacement order and a return label.
 6. If no, escalate Case.
17. Minimize the window. Click Save.
18. Go to the **Business Process Flow** and click on the **Author** stage.
19. Select **Default Subject** for **Article Subject**, check the **Mark for Review** checkbox, and click **Next Stage**.

Task 2 **Approve and Publish Knowledge Article**

In this task, you will assume the role of the Knowledge Article Approver and Approve the Knowledge Article you created, and then publish it.

1. Go to the **Business Process Flow** and click on the **Review** stage.
2. Select **Approved** for **Review**.
3. Click **OK**.
4. Go to the **Business Process Flow** and click on the **Review** stage.
5. Click **Next Stage**.

6. Click on the **Publish** stage.
7. Check the **Set Product Association** checkbox and click **Finish**.
8. Go to the command bar and click **Publish**. YOu may need to click the ellipsis to see it.
9. Select **Now** for Publish, **Published** for Published Status, and click **Publish**. Do NOT navigate away from this page.

Task 3 **Revise Knowledge Article**

In this task, you will change step 6 of the Knowledge Article you created from Escalate Case to Assign to Manager, and then you will revise the Knowledge Article.

1. Make sure you still have the Knowledge Article you created opened.
2. Click **Create Minor Version** from the command bar. You may need to click the ellipsis to see this
3. Click **OK**.
4. Go to the **Content** section.
5. Replace step **6** of the **Procedure** from **If no, escalate Case** to **If no, assign to manager**.
6. Click **Save**.
7. Click **Approve**. You may need to click the ellipsis to see this
8. Click **Publish**.
9. Select **Now** and click **Publish** again.
10. Click on the Sitemap and select Knowledge Articles.
11. You should find the new version of the **Missing Parts** article in the **My Active Articles** view but not the old version.
12. Change the view to **Archived Articles**. You should find the old version of the **Missing Parts** article in this view.

lab: title: 'Lab: Omnichannel Lab 1' module: 'Module 5: Omnichannel'

In this module, you will be configuring an SMS channel that you will be using throughout the rest of the course. It will be important when we get to the final steps, that you are naming everything exactly as described in the lab. This will reduce the chance of accidentally selecting an object created by another student during the process.

Note: Please add your lab user prefix before any data you create in Dynamics 365. Ex: **[MollyC] + case**

Exercise 1: Configure an SMS Channel

Before you can create an SMS channel in the OCS, you will need to sign up with an SMS provider. We will be leveraging Twilio because Twilio numbers are available to be consumed right away.

Task 1: Sign up for a Twilio account that that can be leveraged with the system

1. In the same browser session that you are currently logged into the Omnichannel Administration application with, navigate to <https://twilio.com>. *(you will be directed to a 3rd party site (Twilio) to sign up for a free trial. Information that you enter when you sign up may be used by the 3rd party. We recommend that you review their privacy statement before signing up)*

(If you are not currently logged into Omnichannel Administration, use the credentials provided to you by your instructor to log in.)

2. Select the **Sign-up** button.
3. You will be asked to provide your contact and detail information including: First Name, Last Name, Email, Password. Once you have provided those details and accepted the terms of service, select the **Start your Free Trial** Button.
4. To complete the registration process, you will need to respond to the verification email sent to you by clicking the **Confirm your Email link**.
5. You will be taken to the Twilio sign in page. Sign in using the username and password you created earlier.
6. You will likely need to verify your phone number to start your trial. Select your country code, enter your phone number, and select **Verify**.
7. Enter the verification code that was sent to you through SMS and click **Submit**.
8. You may be asked some questions about yourself, Answer the questions to complete the process.
9. Once you arrive at your dashboard page, leave the page open so you can return to it later.

Task 2: Configure an SMS Work Stream

Now that you have a Twilio account that you can leverage, the next step in the process is to create a dedicated SMS work Stream that will leverage that will leverage that number to facilitate SMS communication.

IMPORTANT: *If you would prefer to use a TeleSign account, you can setup a TeleSign account instead of Twilio.*

1. If the Omnichannel Administration application is not open in another tab, open it in a new tab by navigating to <https://home.dynamics.com>.
2. Under **Work Distribution Management**, select **Work Stream**, select the new button to create a new **Work Stream**.
3. Under **General Information**, configure the SMS work stream as follows:
 - **Name:** Yourusername Twillio SMS Support (*use the account name provided to you by your instructor.*)
 - **Channel:** SMS
 - **Capacity:** 20
 - **Auto-Close after Inactivity:** 2 Days

Because there can often be a delay in communication with customers engage through SMS channels, you want to ensure that you are allowing enough time for the customer to communicate back with you. For this reason, you should always set the auto-close after inactivity option to a minimum of 2 days.

1. To ensure that SMS conversations are automatically routed to agents, set the **Work Distribution mode** to **Push**.
2. Set **Allowed Preferences** to **Available** and **Busy**.

3. Select the **Save** button to save the work stream but leave the record open.
4. Select the **SMS Settings** tab.
5. Ensure that the **SMS provider field** is set to **Twilio**.
6. If Twilio is not open in another tab, open the tab that contains your Twilio account information.
7. Locate the **Account SID** and **Auth Token** for your account. Copy and paste the details into the **Account SID** and **Auth Token** under the Twilio Account Information from the workstream.
8. Select **Save**. The Twilio inbound URL will be generated and displayed.







Task 3: Obtain an SMS number from Twilio

Twilio needs to register the Inbound URL for the application with your account. Once this is done, you can add a phone number to your account that will be used with SMS channel.

1. If you closed the tab with your Twilio Account, open your it in a new tab in the current browser session. **Note:** *You may need to verify your identity when signing in. You may receive an SMS message with an Access code.*
2. Using the navigation menu on the left, select the **ellipsis** icon, and under super network, select **Phone Numbers**.
3. Under **Active Numbers**, click the **Get Started** link.
4. In the **Get Started with Phone Numbers** screen, click the **Get your first Twilio phone number** button.
5. A number with Voice, SMS, and MMS capabilities will be displayed, click the **Choose this Number** button. *(If you would like to find a different number, you can select Search for a different number.)*
6. Once your new number is provided, click the **Done** button.
7. Leave Twilio open for later

Task 4: Add your new number to your SMS work stream

Once you have obtained a phone number, you are ready to create an SMS channel in the application to use the phone number.

1. Navigate to, or if necessary, open the **Omnichannel Administration** application in another tab.
2. Under **Work Distribution Management**, open the [Yourlabuser] **Twilio SMS** work stream with your name or initials that you created in the previous exercise, and click the **SMS Numbers** tab.
3. Select the **New SMS Number** button from the SMS numbers sub-grid
4. Configure the number as follows:
5. **Number:**    The number you got in the previous tab   

Make sure you include the country code and do not include any spaces in the name

- **Type:** Long Code
- **Work Stream:** Yourlabuser Twilio SMS Support
- **Operating Hours:** 24/7
- Select **Save**.
- Click the **Validate API Key** button.

It can take a minute or two for the validation process to proceed. After it is complete, your SMS work stream is configured and is ready to accept SMS requests.

Task 5: Establish a connection between Omnichannel for Customer Service and the Twilio account

Perform the following steps to configure the URL in Twilio for the SMS messages from Omnichannel for Customer Service to be processed in Twilio:

1. Copy the value in **Twilio inbound URL** of the work stream for Twilio.
2. Go to your Twilio account > **Phone Numbers** > **Active Numbers**, and then select the SMS phone number.
3. In the **Messaging** section, paste the Twilio inbound URL. The configuration should be set to **Webhook**

Exercise 2: Create a PVA bot to handle conversations

Task 1: Sign-up for a PVA trial and create the bot

In this task, you will sign up for a trial Microsoft Power Virtual Agents and create your first bot.

1. Navigate to <https://powerva.microsoft.com/>.
2. Using the navigation menu at the top, select the **Bot Icon**, and click **New Bot**.
3. Enter **Customer service bot (You Initials)** for **Name**, select your **Language**, select your environment, and click **Create**. Make sure you do not have the default environment selected.
4. Wait for the bot to be created. It might take a few minutes to complete.
5. Click **Explore Bot**, If prompted.

Task 2: Create support categories entity

In this task, you will create a new entity named support categories that has three items, order question, delivery and setup, and weather related.

1. Select **Entities**.
2. Click **+ New custom entity**.
3. Enter **Support categories** for **Name**.
4. Enter **Order question** as an item and click **Add**.
5. Enter **Delivery & setup** as an item and click **Add**.
6. Enter **Weather related** as an item and click **Add**.
7. Support category custom entity should now have three items. Make sure **Start matching** is turned on and click **Save**.
8. Click **Close**.

Task 3: Create order entity

In this task, you will create a new entity named order that has two items, place order and cancel order.

1. Make sure you still have **Entities** selected and click **+ New custom entity**.
2. Enter **Order** for **Name**.
3. Enter **Place order** as an item and click **Add**.
4. Enter **Cancel order** as an item and click **Add**.
5. The order custom entity should now have two items. Make sure **Smart matching** is turned on and click **Save**.
6. Click **Close**.

Task 4: Create a Cancel Order Topic:

1. Select **Topics** and click **+ New topic**.
2. Enter **Cancel order** for Name, enter **Cancel order** as a trigger phrase and click **Add**.
3. Enter **Cancel** as a trigger phrase and click **Add**.
4. The **Cancel order** topic should now have two trigger phrases. Click **Go to authoring canvas**.
5. Enter **Orders must be canceled at least 48 hours before you scheduled event. Your deposit will not be refunded** for **Message** and click **Add node**. Note: when you copy and paste from the lab, you may see some styling in the canvas. Feel free to keep the styling or change it to your preferences.
6. Select **Show a message**.
7. Enter **Only live agents can process a cancelation request** for **Message** and click **Add node**.
8. Select **Ask a question**.
9. Enter **Would you like to talk to one now?** for question, enter **Yes** as an option, and click **+ New option**.
10. Enter **No** as the second option. You should now have two conditions.
11. Go to the **Yes** branch and click **Add node**.
12. Hover over the **End the conversation** option and select **Transfer to agent**.
13. Enter **Customer would like to cancel order** for **Private message to agent**.
14. Go to the **No** branch and click **Add node**.

15. Select **Show a message**.










16. Enter **Can I help you with anything else?** for **Message**.

17. Click **Save**.

Task 5: Create a New order Topic

1. Select **Topics** and click **+ New topic**.
2. Enter **New order** for **Name**, enter **New order** as a trigger phrase and click **Add**.
3. Enter **Place an order** as a trigger phrase and click **Add**.
4. Enter **Make a new order** as a trigger phrase and click **Add**.
5. The New order topic should now have three trigger phrases. Click **Go to authoring canvas**.
6. Enter **Be advised that all new orders required a non-refundable \ \$100.00 deposit that will be applied to your total order cost** for **Message** and click **Add node**.
7. Select **Show a message**.
8. Enter **Let me transfer you to an agent to process your request** for **Message** and click **Add node**.
9. Hover over the **End the conversation** option and select **Transfer to agent**.
10. Enter **Customer would like to place an order** for **Private message to agent**.
11. The New order topic should now have three nodes. Click **Save**.

Task 6: Create a check weather topic

1. Select **Topics** and click **+ New topic**.
2. Enter **Check weather** for **Name**, enter **Weather** as a trigger phrase and click **Add**.
3. Enter **Today**    **s weather** as a trigger phrase and click **Add**.
4. Enter **What is the weather like** as a trigger phrase and click **Add**.
5. Enter **Will it rain today** as a trigger phrase and click **Add**.
6. Enter **Check weather** as a trigger phrase and click **Add**.
7. The Check weather topic should now have five trigger phrases. Click **Go to authoring canvas**.
8. Enter **I can help you with that, I just need some additional information** for **Message** and click **Add node**.
9. Select **Ask a question**.
10. Enter **What City do you live in?** click **Identify** and select **User**    **s entire response**.
11. Click **Edit** variable.
12. Enter **City** for **Name** and close the **Variable properties** pane.
13. Click **Add node**.
14. Select **Ask a question**.
15. Enter **What is your postal code?** click **Identify** and select **User**    **s entire response**.
16. Click **Edit** variable.
17. Enter **ZipCode** for **Name** and close the **Variable properties** pane.

18. Click **Add note**.
19. Select **Call an action** and select **Create a flow**.
20. Power automate should open on a new browser window or tab.
21. Select your **country/region** and click **Get started**, if prompted.
22. Click **+ Add an input**.
23. Select **Text**.
24. Enter **City**, enter **Provide city**, and click **+ Add an input** again.
25. Select **Text** again.
26. Enter **Zip code** and enter **Provide zip code**.
27. Hover over between the flow trigger and the step, and then click on the **+** button. You are adding a step between the trigger and the return values step.
28. Select **Add an action**.
29. Search for msn and select **Get forecast for today**.
30. Click on the Location field, go to the Dynamic content pane and select **City**,
31. Add comma after the city and then select **Zip code** from the Dynamic content pane.
32. Select your preferred units. For this lab, we are selecting **Imperial**.
33. Click to expand the **Return value(s) to Power Virtual Agents** step.
34. Click **+ Add an output**.
35. Select **Text**.
36. Enter **Day_Summary** for name, click on the **Day_summary** field and select **Day Summary** from the Dynamic content pane.
37. Click **Add an output**.

38. Select **Text**.
39. Enter **Location** for **Name**, click on the **Location** field and select **Location** from the Dynamic content pane.
40. Click **Add an output** again.
41. Select **Text**.
42. Enter **Chance_of_rain** for **Name**, click on the **Chance of rain** field and select **Rain chance** from the Dynamic content pane.
43. Rename the flow to **Check weather** and click **Save**.
44. Wait for the flow to be saved.
45. Go back to **Power Virtual Agents**.
46. Click **Add node**.
47. Select **Call an action** and then select the **Check weather** flow you created.
48. Click on the **City** dropdown and select **City**.
49. Click on the **Zip code** dropdown and select **ZipCode**.
50. Click **Add node**.
51. Select **Show a message**.
52. Click **Insert a variable**.
53. Select **Day_Summary**.
54. Type **with a chance of** and insert **Chance_of_Rain** variable.
55. Type **percent of rain in** and insert **Location** variable.
56. The **Message**
57. Click **Save** to save the topic.

Task 7: Create a Delivery and Setup topic

1. Select **Topics** and click **+ New topic**.
2. Enter **Delivery and setup** for **Name**.
3. Enter **Delivery** as a trigger phrase and click **Add**.
4. Enter **When will my order be delivered** as a trigger phrase and click **Add**.
5. Enter **Who will setup the items** as a trigger phrase and click **Add**.
6. Enter **Who will remove the items** as a trigger phrase and click **Add**.
7. Enter **Schedule a setup** as a trigger phrase and click **Add**.
8. Enter **Schedule delivery** as a trigger phrase and click **Add**.
9. Enter **Schedule removal** as a trigger phrase and click **Add**.
10. The Delivery and setup topic should now have seven trigger phrases. Click **Go to authoring canvas**.
11. Enter **Items are delivered 1 hour before your scheduled event** for **Message** and click **Add node**.
12. Select **Show a message**.
13. Enter **Two delivery people will come and setup your items** for **Message** and click **Add node**.
14. Select **Show a message**.
15. Enter **What else can I assist with?** for **Message**.
16. Click **Save** to save the topic.


Task 8: Add an Order Topic:

1. Select **Topics** and click **+ New topic**.
2. Enter **Order** for **Name**.
3. Enter **Order question** for trigger phrase and click **Add**.
4. Click **Go to authoring canvas**.
5. Enter **I can help you with that** for Message and click Add node.
6. Select **Ask a question**.
7. Enter **What do you want to do?** enter **Place an order** for the first option and click **+ New option**.

Enter **Cancel order** for the second option.

1. You should now have two condition branches. Go to the **Place an order** branch and click **Add node**.
2. Select **Go to another topic**.
3. Select the **New order** topic you created.
4. Go to the **Cancel order** branch and click **Add node**.
5. Select **Go to another topic** again.
6. Select the **Cancel order** topic you created.
7. Click **Save** to save the topic.
8. Wait for the topic to be saved.

Task 9: Modify the Greeting system topic:

1. Select **Topics**.
2. Search for **greeting**, hover over the **Greeting** topic and click **Go to authoring canvas**.
3. Replace the first message with **Hi! I am a virtual agent here to help with questions ranging from ordering questions, to weather related questions**.
4. Replace the second message with **If you would like to speak to a human at any time, just let me know**.
5. Click on the  **Options** button of the last message and click **Delete**.
6. Click **Add node**.
7. Select **Ask a question**.
8. Enter **What can I help you with?** for question.
9. Enter **Order questions** for first option and click **+ New option**.
10. Enter **Delivery and setup** and click **+ New option** again.
11. Enter **Weather related** for the third option.
12. You should have three condition branches. Go to the **Order questions** branch and click **Add node**.
13. Select **Go to another topic**.
14. Select the **Order** topic you created.
15. Go to the **Deliver and setup** branch and click **Add node**.
16. Select **Go to another topic**.
17. Select the **Delivery and setup** topic you created.

18. Go to the **Weather related** branch and click **Add node**.
19. Select **Go to another topic**.
20. Select the **Check Weather** topic you created.
21. Click **Save** to save the topic.

Task 10: Test your bot

1. Click on the **Test your bot** button located on the bottom-left of the screen.
2. Turn on **Track between topics**.
3. Type **Hello** and click **Send** or [ENTER].
4. The bot should greet you and give you options. Keep a watch on the current topic.
5. Select **Delivery and setup** from the options.
6. The topic should change to the **Delivery and setup** topic and the bot should replay with the delivery and setup messages.
7. Enter **Order question** and **Send**.
8. The topic should change to the **Order** topic and the bot should give you options to place an order or cancel an order.
9. Choose **Cancel order**.
10. The bot should display the order cancelation messages. Type **Will it rain today** and **Send**.
11. The topic should change to the **Check weather** topic and the bot should ask you to provide your city.
12. Enter city name and **Send**.
13. Provide your zip code and **Send**.
14. The bot should trigger the flow and reply with the result of MSN weather connector.
15. Type **Goodbye** and **Send**.
16. The bot should conclude the chat.

17. Click **Hide bot.**

Task 11: Publish your bot

1. Select **Publish** and click Publish.
2. Click **Publish** again to confirm and wait for the publishing to complete.
3. Click on the **Demo website link**.
4. Try to interact with bot on the demo website and see how it performs.
5. You may share the demo website with others.

Exercise 3: Configure Omnichannel to use the PVA Bot

Task 1: Create a queue for yourself and the Botuser.

1. If necessary, open the **Omnichannel Administration** application, and select **Queues**.
2. Click the **New** button to create a new queue.
3. Enter the following information into the Queue
 1. **Name:** Yourlabuser Queue (Ex. DerikB Queue)
 2. **Priority:** Enter a number in the 100??s
4. Click **Save**
5. In the **Users** sub-grid, select **Add existing** user, and choose the bot user that your instructor created during the demo.
6. Your queue should include both your user account and the Botuser.
7. Click **Save and Close**.

Task 1: Configure a routing rule to send items to the bot

1. Under the **Work Distribution Management**, select **Work Streams**, and open the **Twilio SMS** workstream with your initials that you created earlier.
2. Select the **Routing Rules** tab, and in the **Rule items** sub-grid select **Add**.
3. Configure the Rule item as follows:
 1. **Name:** Route to Your Name Queue (Ex. DerikB Queue)
 2. **Work stream:** Your Twilio SMS work Stream
 3. **Queue:** Your Queue
4. In the Condition section, select Add Condition and configure the Condition as follows.
 1. **Entity:** SMS Engagement Context (Conversation)
 2. **Attribute:** Customer Phone Number
 3. **Operator:** Equals
 4. **Value:** Enter your mobile number with out the country code (Ex. 7775551234)

5. Click Save

lab: title: 'Lab: Omnichannel lab 2' module: 'Module 5: Omnichannel'

In this lab, you will be configuring the Dynamics 365 productivity tools so Agents can take advantage of the Agent script feature. You will be creating four items that will make up the agent script solution.

These items are:

- A macro that will assist agents in creating a new case while they are working on an item.
- A macro that will be leveraged to close the case.
- A general agent script that provides some simple instructions to agents.
- A closing script that will assist the agent in closing issues.

Learning Objectives

After completing the exercises in this lab, you will be able to:







- Create macros that can be leverage in agent scripts
- Create agent scripts to assist agents
- Configure script, text, and macro, script steps in a script
- Enable the productivity pane for agents to leverage scripts

Estimated time to complete this lab: 30 minutes

Exercise 1: Create a Macro that will be leveraged in an Agent Script

Task 1: Build the Create Case Macro

1. Sign in to the Omnichannel Administration app.
2. Under **Agent Experience**, select **Macro**.
3. On the **Active Macros** page, select **+ New**.
4. On the Macro page, specify the following:
 - **Name:** Your lab username - Create Case and Link to Conversation
 - **Description:** This macro action is used to create a case and link the record to the conversation.
5. Under **Predefined Automation Actions**, select **Productivity Automation**.
6. Select **Start macro execution**. *A trigger will be added, and you will not need to provide any additional details.*
7. Under the **Start macro execution** trigger, select the **+ New Step** button.
8. Under **Predefined automation actions**, select **Session Connector**.
9. Select **get the current tab**. *You will not need to provide any additional details.*
10. Select the **+ New Step** button.

11. Under **Predefined automation actions**, select **Productivity Automation**.
12. Select **Open a new form to create a record**.
13. In the **Entity logical name**, enter **incident**.
14. Select **show advanced options**.
15. Set **Attribute Name**    **1** to **title**, and **Set Attribute Value -1** to **Broken Item**
16. Select the **Add new item** button again.
17. Set **Attribute Name**    **2** to **customerid**, **Set Attribute Value -2** to **{customerRecordId}**
18. Repeat steps **16 & 17** to add the following additional attributes:

Attribute Name	Attribute Value
Customeridtype	\\${customerEntityName}
Customeridname	\\${\Session.customerName}
Description	Customers item is not working

1. Once completed, your **open new form and create case record** step, should resemble the image below:
2. Select the **+ New Step** button.
3. Under **Predefined automation actions**, select **Productivity Automation**.
4. Select **Save the record**.
5. Select the **+ New Step** button again.
6. Under **Predefined automation actions**, select **Omnichannel Connector**.
7. Select **Link record to the conversation**.
8. Select the **Entity logical name** field, in the Dynamic content window, select **Entity logical name** from the **Save the Record** step.

9. Set **Entity record ID** to the **Entity record ID** from the **Save the Record step**.
10. Set **Entity record ID** to the **Entity record ID** from the **Save the Record step**.
11. Your completed step should resemble the image below:
12. Select the **+ New Step** button.
13. Under **Predefined automation actions**, select **Session Connector**.
14. Chose **Focus on the tab**
15. Set the **Tab ID** to the **Tab ID** from the **Get the current tab step**.
16. Your completed macro should look like the image below:
17. Scroll to the bottom of the screen and select the **Save and Close** button

Task 2: Build the Resolve Case Macro

1. Under **Agent Experience**, select **Macro**.
2. On the **Active Macros** page, select **+ New**.
3. On the Macro page, specify the following:
 - **Name:** Yourlabusername **Resolve current case**
 - **Description:** This macro action is used to resolve the case you opened.
4. Under **Predefined Automation Actions**, select **Productivity Automation**.
5. Select **Start macro execution**. *A trigger will be added, and you will not need to provide any additional details.*
6. Under the **Start macro execution** trigger, select the **+ New Step** button.
7. Under **Predefined automation actions**, select **Productivity Automation**.
8. Select **Resolve case**
9. Complete the action step as follows:
 - **Billable time:** 0
 - **Incident ID:** {caseId}
 - **Resolution:** KBArticle
10. Select **Save and Close**.

Exercise 2: Build an Agent Script to assist agents

Task 1: Build the Closing session Script

1. If you are not already logged in from the previous exercise, sign in to the Omnichannel Administration app.
2. Under **Agent Experience**, select **Agent Scripts**.
3. On the **Active Agent scripts** page, select **+ New**.
4. On the **New Agent script** page, specify the following:
 - **Name:** Yourlabusername Closing Script (ex. Alans Script)
 - **Description:** Created by yourlabusername to be used by agents when closing a case.
5. Select **Save** to save the script. The **Agent script steps** appears.
6. In the **Agent script steps** section, select **+ New Agent script step**.
7. Complete the Agent script step as follows:
 - **Name:** Yourlabusername Resolve Case
 - **Unique Name:** Yourlabusername script
 - **Order:** 1
 - **Action Type:** Macro
 - **Description:** Greet the customer with the welcome message from the quick reply repository.

- **Target macro:** Yourlabusername  Resolve Case

8. Select **Save and Close**.

9. Select  + **New Agent script step** button again. 

10. Complete the Agent script step as follows:

- **Name:** Yourlabusername Have a Nice Day!
- **Unique Name:** Yourlabusername Closing script
- **Order:** 2
- **Action Type:** Text
- **Text Instructions:** Ask the customer is there is anything you can assist them with. If not, thank them for their time and end the call.

11. Select **Save and Close**.

12. Close the Closing Script Record

Task 2: Build the General Script

1. Under **Agent Experience**, select **Agent Scripts**.
2. On the **Active Agent scripts** page, select **+ New**.
3. On the **New Agent script** page, specify the following:
 - **Name:** Yourlabusername Script (ex. Alan Script)
 - **Description:** Created by yourlabusername to be used by agents working on sessions.
4. Select **Save** to save the script. The **Agent script steps** appears.
5. In the **Agent script steps** section, select **+ New Agent script step**.
6. Complete the Agent script step as follows:
 - **Name:** Yourlabusername Greet the Customer
 - **Unique Name:** Yourlabusername script
 - **Order:** 1
 - **Action Type:** Text
 - **Text Instructions:** Greet the customer with the welcome message from the quick reply repository.
7. Select **Save and Close**.
8. In the **Agent script steps** section, select **+ New Agent script step** button again.
9. Complete the Agent script step as follows:
 - **Name:** Yourlabusername Open a New Case

- **Unique Name:** Yourlabusername script
- **Order:** 2
- **Action Type:** Macro
- **Description:** This will automatically create a new case for the existing customer and link it to the current conversation.
- **Target Macro:** Create Case and Link to Conversation

10. Select **Save and Close**.

11. Select   **+ New Agent script step** button again.  

12. Complete the Agent script step as follows:

- **Name:** Yourlabusername Search for relevant KB article.
- **Unique Name:** Yourlabusername script
- **Order:** 3
- **Action Type:** Text
- **Text instructions:** Use Knowledgebase to look for a relevant knowledge article that might resolve the issue.

13. Select **Save and Close**.

14. Select   **+ New Agent script step** button again.  

15. Complete the Agent script step as follows:

- **Name:** Yourlabusername Proceed to Closing
- **Unique Name:** Yourlabusername script
- **Order:** 4
- **Action Type:** Script
- **Description:** Starts the process of wrapping up the conversation with the customer.

- **Target Script:** Yourlabusername Closing Script

16. Select **Save and Close**.

17. Close the **Closing Script** record

Exercise 3: Configure OCS to use the Agent Script

Task 1: Attach the script to SMS-Sessions

1. Under **Agent Experience**, select **Sessions**.
2. Locate and open the SMS **Default session**.
3. Select the **Agent Scripts** tab
4. In the Agent Scripts Sub Grid, Select the add Existing Agent Script Button.

5. Select the Yourlabusername script, and click Add

lab: title: 'Lab: Omnichannel Lab 3' module: 'Module 5: Omnichannel'

Now that the Omnichannel for Customer Service environment that you are working in has been successfully configured by both you and the instructor; we will examine what the interface might look like from an agent standpoint.

IMPORTANT: Because we are working in shared environments, we are not going to be able to demonstrate the chat experience. When a chat is initiated, we will not be able to guarantee that the items will be routed to the right person.

For this reason, we will only be working with the SMS channels you created in the labs. Because of the routing rules, we can ensure that you will be getting the items as they come in.

Learning Objectives

After completing the exercises in this lab, you will be able to:

- Use Omnichannel for Customer Service to resolve cases.
- See how the bot user handles incoming conversations before routing to an agent.
- Accept conversations that are initiated by users.
- Work with items in the conversation window.
- Enable the productivity pane for agents to leverage scripts

Estimated time to complete this lab: 30 minutes

Exercise 1: Use Omnichannel for Customer Service to assist customers

To successfully complete this exercise, you are going to need three items:

- A mobile device that you can text from. *(You do not have to participate in this lab if you do not want to use your mobile device or you do not have one.)*
- The Omnichannel Administration application open in a browser tab.
- The Omnichannel for Customer Service app, open in a browser tab.

Task 1: Initiate a conversation with OCS

1. If it is not already open in another tab, navigate to the Omnichannel Administration application. (*You will use this to get the support number that will be used.*)
2. In a new browser tab, navigate to <https://home.dynamics.com>
3. Locate and select the **Omnichannel for Customer Service** app.

NOTE: To simulate what will happen when a customer interacts with an agent. We will be sending an SMS message to the queue that we created earlier. Switch to the tab that the Omnichannel Administration application is open in.






1. Select **Work Streams** and open the SMS work stream that you created earlier. (*Make sure to select the one that has your lab user credentials*).
2. On the work stream, select the **SMS** number tab, and note the **SMS number** associated with it.
3. On your mobile device, create a **new chat conversation** to the SMS number in the Work Stream. In the message of the conversation enter something like **???Hello, I need help???**.

NOTE: *Your message app will likely look different.

1. After several seconds you should receive a message back from the virtual agent asking what it can help you with.
2. Enter **What are your hours?**
3. The bot will respond by asking you what store you are interested in. Enter **Seattle**.
4. After the bot tells you the hours, enter **Talk to an agent**.
5. The bot will tell you that it can help you with that, and then transfer you to a live agent.

Task 2: Communicate with the customer

Next you will switch to the Omnichannel for Customer Service agent application and be working as an agent would with the customer. It is important that you were signed in earlier to make sure that you will get the conversation request when it comes through.


1. Make sure you have the omnichannel application open as an agent.
2. After several seconds, you will receive a notification for the conversation. Select **Accept**.
3. When the session opens, you will see the complete conversation that has taken place up to this point. Scroll through the conversation to view the details of it and then return to the end.
4. Start by expanding the **Productivity pane** on the right side of the screen. Once expanded, it will display **Agent Guidance**.
5. Ensure that the **yourlabusername script** you created earlier is selected. *(If it is not use the dropdown menu to select it.)*
6. On the script, expand **Greet the customer** step.
7. After reviewing the text, select the **Quick reply**  icon in the conversation panel.
8. Enter the word **Hello**. From the list of options displayed, select **Hello, you**  **re chatting with . . .** Press the **Enter** key on your keyboard.
9. Once the message is sent, mark the **Greet the Customer** task as **Done**.
10. On your mobile device, send the following message: **I**  **m getting frustrated because things are damaged.**  *(Notice at the top of the conversation panel, that the tone of the conversation is changing to slightly negative.)*
11. Back on your mobile device, send the message: **I**  **m really upset.** *(Notice that the tone of the conversation is changed to*

Negative.)

12. On your Mobile Device, send the message: **The Item I received was broken.**

Note: To ensure that we have all the related details. Next, we will associate this conversation with a customer. *(Normally these details could be passed to the conversation from the mobile device, but for out purposes we will like the conversation manually.)*

1. In the conversation summary, select **Search Customer**.
2. Change the lookup to **Contacts**.
3. Select **Jim Glynn (sample)**. *Notice how additional details are now populated to the case record. This will help to provide additional context as we work with the customer.*
4. We need to open a new case for this item. On the **Open a New Case** step in the agent script, select the **Run Macro**. *Once complete, a new case will be created and linked to the conversation.*
5. If necessary, select the **Customer Summary** tab, to return to the customer summary screen.
6. Now that we have tied the case to the customer and have opened a new case, let **???**s solve the customers issue. On the agent script expand the **Search for Relevant KB Article** step.
7. Based on the guidance provided by the script, on the conversation select the **ellipsis**. From the menu that appears, select **Knowledge Articles**. *The Knowledge Search window appears.*
8. Enter **Damaged** into the search field and press enter.
9. From the list of articles, select the **Damaged or Defective products** article to display the contents. **NOTE:** *We could send this article to a customer by configuring email integration with the channel integration framework. However, that is out of scope of the class. For this example, we will assume that the article was sent to the customer.*

10. In the conversation window: **ask the customer if they received the article?**
11. On your mobile device, enter: **Yes I did, thank you.** *Notice the conversation tone begins to change to more positive.*
12. In the conversation window in OCS, ask them if **they would like you to walk them through the process?**
13. On your mobile device, enter: **No, this helps a lot, thanks.** *The conversation tone is getting more positive.*
14. Back in OCS go back to the **Agent Script** in the **Productivity Pane**. Select the **Icon** next to **Search for relevant KB article** to mark the step as **Done**.
15. Select the **View** button on the **Proceed to Closing** step. *The current script will be closed, and the Closing Script will open.*
16. On the **Resolve Case** step, select the **Run** button. Once the macro is completed, the associated case will be resolved.
17. Expand the **Have a nice day** step. Per the step instructions, in the conversation window **ask them if there is anything else you can assist them with.**
18. On your mobile device, enter: **Nope, all good, thanks again.**
19. In the conversation window, enter **Thanks for your time, Have a great day.**
20. On the **Closing** agent script, mark the **Have a Nice Day** step as **Done**.
21. On the conversation, select the **End** button located at the top of the conversation. *Notice that the conversation stays open, but changes to Internal. This lets you do any final wrap up on the conversation.*
22. On the **Session** s list on the left navigation, Click the **X** to close the Jim Glynn session. on the dialog that appears, select the **close** button to confirm the selection.

23. On the Omnichannel Agent dashboard, you will see the Jim Glynn conversation has been moved to the **Closed** area.

lab: title: 'Lab: Configure Customer Service Scheduling' module: 'Module 6: Customer Service Scheduling'

MB-230: Customer Service Scheduling

Exercise 1: Configure Customer Service Scheduling

In this exercise, you will create business units, define a business closure, create facility/equipment records for organization units, and create resources.

Task 1: Define Organization Units

1. Navigate to [Power Apps maker portal](#) and make sure you are in the correct environment.
2. Select **Apps** and click to open the **Customer Service Hub** application.
3. Click **Settings** and select **Personalize Settings**.
4. Select your **Time Zone** and click **OK**.
5. Click **Change area** and select The **Scheduling** area.
6. Go to the **Settings** group and select **Organizational Units**.
7. Click **+ New**.
8. Enter **Main Ave Location** for **Name** and select the **Scheduling** tab.
9. Enter **47.63993** for Latitude, **-122.12557** for Longitude and click **Save and Close**. You may use different GPS locations but make sure they are valid locations.
10. Create two more **Organizational Units** with the values listed in the table below.

Name	Latitude	Longitude
19th Ave Location	47.63962	-122.12853
35th St Location	47.64284	-122.13009

1. You should now have three Organizational Units.
2. Do not navigate away from this application.

Task 2: Define Business Closure

In this task, you will define a new business closure.

1. Select **Business Closures**.
2. Click **+ New**.
3. Enter **Worldwide Rest Day** for **Name**, select a date one week from now for **Start Date**, and click **OK**.
4. Do not navigate away from this application.

Task 3: Create Facilities/Equipment Records

In this task, you will create facilities/equipment records for the organizational units you created and set their working hours.

1. Select **Facilities/equipment** and click **+ New**.
2. Enter **Main Ave - Service Bay 1** for **Name**, select **Main Ave Location** for **Organizational Unit**, select a **Time Zone**, select **Business Unit**, and click **Save**. This is the default business unit that gets created automatically.
3. Select the **Work Hours** tab, click on one of the events listed on the calendar, click **Edit**, and select **All events in the series**.
4. Select **08:00 AM to 08:00 PM**, remove **Saturday** and **Sunday**, and click **Remove end date**, if there is an end date selected.
5. Click **Save** to save the working hours.
6. Click **Save and Close**.
7. Click **+ New** again.
8. Enter **Main Ave - Service Bay 2** for **Name**, select **Main Ave Location** for **Organizational Unit**, select your **Time Zone**, select your **Business Unit**, and click **Save**.
9. Select the **Work Hours** tab, click on one of the events listed on the calendar, click **Edit**, and select **All events in the series**.
10. Select **08:00 AM to 08:00 PM**, remove **Saturday** and **Sunday**, click **Remove end date** if one is selected, and click **Save**.
11. Click **Save and Close**.
12. Repeat the previous 5 steps and create the **Facilities/Equipment** listed in the table below.

Name	Organizational Unit	Time Zone	Business Unit	Working Hours
Main Ave - Tire Jack	Main Ave Location	Your time zone	Your business unit	Mon-Fri 8:00AM to 8:00PM
19th Ave - Service Bay 1	19th Ave Location	Your time zone	Your business unit	Mon-Fri 8:00AM to 8:00PM
19th Ave - Service Bay 2	19th Ave Location	Your time zone	Your business unit	Mon-Fri 8:00AM to 8:00PM
19th Ave - Tire Jack	19th Ave Location	Your time zone	Your business unit	Mon-Fri 8:00AM to 8:00PM
35th St - Service Bay 1	35th St Location	Your time zone	Your business unit	Mon-Fri 8:00AM to 8:00PM
35th St - Service Bay 2	35th St Location	Your time zone	Your business unit	Mon-Fri 8:00AM to 8:00PM
35th St - Tire Jack	35th St Location	Your time zone	Your business unit	Mon-Fri 8:00AM to 8:00PM

1. You should now have total of 9 Facilities/Equipment records.

Exercise 2: Resource Configuration

In this exercise, you will create contact records, create resource categories, and create resources.

Task 1: Create Contacts

In this task you will create new contact records.

1. Navigate to [Power Apps maker portal](#) and make sure you are in the correct environment.
2. Select **Apps** and click to open the **Customer Service Hub** application.
3. Click **Change area** and select The **Service** area if not already selected.
4. Select **Contacts** and click **+ New**.
5. Enter **Mike** for **First Name**, **Smith** for **Last Name**, and click **Save and Close**.
6. Repeat the previous two and create the **Contact** records listed in the table below.

First Name	Last Name
Jennifer	Leary
Judy	Anderson
Allan	Jackson
Sven	Locarte
Alex	Nelson

1. You should now have six contact records.
2. Do not navigate away from this application

Task 2: Create Resource Categories

In this task you will create new resource categories.

1. Click **Change area** and select The **Scheduling** area.
2. Go to the **Resource Categories** and click **+ New**.
3. Enter **Senior Technician** for **Name** and click **Save and Close**.
4. Click **+ New again**.
5. Enter **Technician** for **Name** and click **Save and Close**.
6. Create two more **Resource Categories** and name them **Service Bay Facility** and **Tire Jack Equipment**.
7. You should now have 4 **Resource Categories**.
8. Do not navigate away from this application.

Task 3: Create Resources

In this task you will create new contact type resources.

























1. Select **Resources** and click **+ New**.
2. Select **Contact** for **Resource Type**, select **Mike Smith** for **Contact**, and select the **Scheduling** tab.
3. Select **Organizational Unit Address** for **Start** and **End Locations**, select **Main Avenue Location** for **Organizational Unit**, and click **Save**.
4. Select the **Work Hours** tab, click on one of the events on the calendar, click **Edit**, and select **All events in the series**.
5. Select **08:00 AM** to **04:30 PM** and click **Add Break**.
6. Remove **Saturday** and **Sunday**, select **Observe Business Closure**, then click **Save**.
7. Select the **General** tab.
8. Go to the Resource Categories sub-grid and click **+ New Bookable Resource Category Assn**.
9. Select **Senior Technician** and click **Save and Close**.
10. Repeat the previous 9 steps and create the resources listed in the table below.

Resource Type	Contact	Start and End Locations	Organizational unit	Work Hours	Resource Category Assn
---------------	---------	-------------------------	---------------------	------------	------------------------

Resource Type	Contact	Start and End Locations	Organizational unit	Work Hours	Resource Category Assn
Contact	Judy Anderson	Organizational Unit Address	19th Ave Location	Mo 08:00AM to 04:30 PM + Break Observe Business Closure	Senior Technician
Contact	Sven Locarte	Organizational Unit Address	35th St Location	Mo 08:00AM to 04:30 PM + Break Observe Business Closure	Senior Technician
Contact	Jennifer Leary	Organizational Unit Address	Main Avenue Location	Mo 08:00AM to 04:30 PM + Break Observe Business Closure	Technician

Resource Type	Contact	Start and End Locations	Organizational unit	Work Hours	Resource Category Assn
Contact	Allan Jackson	Organizational Unit Address	19th Ave Location	Mo ◆◆◆	Technician
				Fr 08:00AM to 04:30 PM + Break Observe Business Closure	
Contact	Alex Nelson	Organizational Unit Address	35th St Location	Mo ◆◆◆	Technician
				Fr 08:00AM to 04:30 PM + Break Observe Business Closure	

1. You should now have 6 resources. Click **+ New**.
2. Select **Facility** for **Resource Type**, select **19th Ave** ◆◆◆ **Service Bay 1** for **Facility Equipment**, and select the **Scheduling** tab.
3. Select **Organizational Unit Address** for **Start and End Locations**, and then click **Save**.
4. Select the **General** tab.
5. Go to the Resource Categories sub-grid and click **+ New Bookable Resource Category Assn**.
6. Select **Service Bay Facility** and click **Save and Close**.
7. Repeat the previous 3 steps and create the resources listed in the table below.

Resource Type	Facillty Equipment	Start and End Locations	Resource Category Assn
Facility	19th Ave    Service Bay 2	Organizational Unit Address	Service Bay Facility
Facility	35th St    Service Bay 1	Organizational Unit Address	Service Bay Facility
Facility	35th St    Service Bay 2	Organizational Unit Address	Service Bay Facility
Facility	Main Ave    Service Bay 1	Organizational Unit Address	Service Bay Facility
Facility	Main Ave    Service Bay 2	Organizational Unit Address	Service Bay Facility
Equipment	19th Ave    Tire Jack	Organizational Unit Address	Tire Jack Equipment
Equipment	35th St    Tire Jack	Organizational Unit Address	Tire Jack Equipment
Equipment	Main Ave    Tire Jack	Organizational Unit Address	Tire Jack Equipment

18. You should now have 15 Resources.

lab: title: 'Lab: Define Services' module: 'Module 6: Customer Service Scheduling'

Exercise 1: Define Services

In this exercise, define oil change and tire rotation services.

Task 1: Create Oil Change Service

In this task you will create an oil change service.

1. Navigate to [Power Apps maker portal](#) and make sure you are in the correct environment.
2. Select **Apps** and click to open the **Customer Service Hub** application.
3. Select **Services** and click **+ New**.
4. Enter **Oil Change** for **Name** and click **Save**.
5. Select the **Resource Requirements** tab, change the **Name** to **Oil Change**, select **All** for **Select**, and select **Organizational Unit** for **Part of Same**.
6. Click **+ Requirement**.
7. Enter **Service Technician** for **Name** and select **Technician** for **Resource Category**.
8. Select the **Oil Change** row and click **+ Requirement**.
9. Enter **Service Bay** for **Name**, select **Service Bay Facility** for **Resource Category**, and click **+ New** again.
10. Enter **Tire Rotation** for **Name** and click **Save**.
11. Select the **Resource Requirements** tab, change the **Name** to **Tire Rotation**, select **All** for **Select**, and select **Organizational Unit** for **Part of Same**.
12. Click **+ Requirement**.
13. Enter **1 hour** for **Duration**.
14. Enter **Senior Technician** for **Name** and select **Senior Technician** for **Resource Category**.

15. Select the **Tire Rotation** row and click **+ Requirement**.
16. Enter **Service Bay** for **Name** and select **Service Bay Facility** for **Resource Category**.
17. Select the **Tire Rotation** row and click **+ Requirement**.
18. Enter **Service Technician** for **Name** and select **Technician** for **Resource Category**.
19. Select the **Tire Rotation** row and click **+ Requirement**.
20. Enter **Tire Jack** for **Name** and select **Tire Jack Equipment** for **Resource Category**.
21. The **Tire Rotation** service should now have **4** requirements.


Exercise 2: Create and Schedule Service Activities

In this exercise, you create and schedule service activities for an oil change and a tire rotation.

Task 1: Create Oil Change Service

In this task you will create and schedule an oil change service activity.

1. Navigate to [Power Apps maker portal](#) and make sure you are in the correct environment.
2. Select **Apps** and click to open the **Customer Service Hub** application.
3. Select **Service Activities** and click create **Service Activity**.
4. Enter **Oil Change Service** for **Subject**, select **Oil Change** for **Service**, select **Main Ave Location** for **Organizational Unit**, and click **Save**.
5. Click **Book**.
6. Go to the **Filter View**, select **Main Ave Location** for **Organizational Unit**, and click **Search**.
7. Expand one of the available slots and see what resources are included in it. In our case Service Bay 1 and Jennifer Leary will be included.
8. Go to the Resources pane and click on the Start date picker.
9. Select a date one week from today. The rest of the dates will change to reflect the change you made.
10. Click **Book & Exit**.
11. Refresh the service activity record.
12. The status should now change from **Requested** to **Reserved**.
13. Select the **Bookings** tab. You should see the booked resources for this service activity.
14. Select **Scheduling**, select **Main Ave Location** for **Organizational Units** and click **Search**.

15. Select **Horizontal View** and click on the date picker.
16. Select the date you booked the **Oil Change** service activity.
17. **Jennifer Leary** and **Service Bay 1** should show as booked for **30** minutes. Click on the **Jennifer Leary** s booking.

18. Go to the Details pane. You should see more information about the booking.

lab: title: 'Lab: Configure Customer Service Insights' module: 'Module 8: Customer Service Insights'

MB-230: Customer Service Insights

Before Students begin HOL

You should verify that Customer Service Insights is installed and attached to the Dynamics 365 Customer Service environment that you are working with. You can do that by navigating to <https://CSI.ai.dynamics.com> and verifying that the sample work space is there. That is all you need to do with the environment at this point.

Exercise 1: Configure Topic Settings

Task 1: Configure how topics are grouped

1. Open an in-private browser and navigate to <https://CSL.ai.dynamics.com>. *(If prompted for credentials, use the same credentials that you have been using for the training environment)*
2. Using the navigation at the top of the application, select the **Workspaces** icon. From the list of available environments, select the **workspace** that your Instructor created during the demo.
3. Using the navigation at the top of the application, select the **Settings** icon.
4. From the list that appears, select **Topic Granularity**.
5. Adjust the **Granularity** setting to **Very Low**. Click the **Save** button twice to confirm your changes.
6. For your changes to display in the application you will need to click the **Refresh** button. *(After the refresh is complete you will likely have only 2 topics. If your number is different, that is OK.)*
7. To ensure that we have enough topics to work with in remaining exercises, select the **Settings** icon again. From the list that appears, select **Topic Granularity**.
8. Adjust the **Granularity** setting to **High**. Click the **Save** button twice to confirm your changes.
9. For your changes to display in the application you will need to click the **Refresh** button. *(After the refresh is complete you will likely have 4 topics. If your number is different, that is OK.)*

10. You may find after you have ingested topics that adjusting how the data is mapped may provide better results. You can adjust the data mapping settings, to ensure case data is mapped correctly. Using the navigation at the top of the application, select the **Settings** icon again.
11. Select **Data Mapping**. On the **case** table, click the **pencil** icon to change the mapping fields.
12. Notice you can select a different table if needed. (*Since we are working in a shared environment with other students, please do not change the table currently.*)
13. Click **Next**
14. Here you could modify how fields from the source table are mapped to destination fields. (*Again, since we are working in shared an environment, please do not change the table at this time.*)
15. Since we are not going to be making any changes currently, select the **X** in the upper right corner to leave cancel and leave the mapping settings.
16. With **Topics** selected, select the **Product feature information required** topic.
17. If you decide the name of the topic the application provides is not the best option, it can be changed to something more appropriate by clicking the **Rename** button. (*Since we are sharing an environment, do not rename the item*)
18. One of the key advantages of Customer Service Insights is that Topics surfaced in the application can turned into Power Virtual Agent topics that can be used in bots. (*Appropriate Power Virtual Agent licensing is required*). To create a PVA topic, click the **Automate** button.
19. Since a Power Virtual Agent bot was created earlier, Power Virtual Agents will open, and a new topic be created automatically.
20. Notice that trigger phrases have been populated. Additional trigger phrases could be added as needed. (*Additionally, you could open the authoring canvas and design an appropriate conversation path for*

the topic. Again, because of the shared environment we will not be making any changes and will close the PVA window.)

21. After closing the window, select **Cases** to see the cases that make up this topic.
22. From the list of topics, select a case such as **Product Question (Sample)**. This will open the case record in Dynamics 365 Customer Service. Agents or managers could examine the case or work with it based on their needs. *(Once finished working with the case, close the tab to return to the case list.)*
23. After reviewing the case, we can see that it was placed in the correct topic. Use your mouse to hover over **Product Question (Sample)** again and select the **thumbs up** icon to note this.

Exercise 2: Use Customer Service Insights

Task 1: Configure how topics are grouped

1. In you are not already in **Customer Service Insights**, navigate to <https://CSL.ai.dynamics.com>
2. Using the **Navigation** at the top of the application, select the **Workspaces** icon. From the list of available environments, select sample environment.
3. Using the left navigation, select **Customer Satisfaction**.
4. In the **Customer satisfaction** driver graphic, locate and select the **volume** column heading.
5. Once sorted, you can see that almost between 15 & 20 percent of your cases were related to the use of a promo code. Over the last Thirty days, the overall customer satisfaction has started to fall slightly.
6. Using the time period filters at the top, change the time with period to **Last 7 days**. You can see that the topic is trending downward and the customer satisfaction has fallen by **almost 2 percent**.
7. Change the Time Period to Last 24 hours. Over the last 24 hours the score has fallen even more.
8. We can see by the CSAT visual, most of the customer dissatisfactions appear to be centered around Twitter and Facebook.
9. Back in **the Customer satisfaction** drivers, select **Details** on the use of customer promo code topic.
10. In the **Analytics** tab, we can see that there is a severe resolution time problem related to **Athletic Socks**, and **Kids Rain boots**. Based on this data, it would be idea to create a PVA topic to address this. This

is where we would select **Automate** to address the situation if we were not working in a shared environment.

Table of Contents

It is strongly recommended that MCTs and Partners access these materials and in turn, provide them separately to students.

Pointing students directly to GitHub to access Lab steps as part of an ongoing class will require them to access yet another UI as part of the course, contributing to a confusing experience for the student. An explanation to the student regarding why they are receiving separate Lab instructions can highlight the nature of an always-changing cloud-based interface and platform. Microsoft Learning support for accessing files on GitHub and support for navigation of the GitHub site is limited to MCTs teaching this course only. 7

{{ activity.lab.title }}{% if activity.lab.type %} - {{ activity.lab.type }}{% endif %} 1

{{ activity.demo.title }} 1

https://
???your_power_app_portal_url.com/_services/auth/publickey 1