Microsoft

Microsoft Cloud for Retail in a Day

Training Agenda

Time zone: PST

Day 1

08:00 AM – 08:15 PM | Introduction **(Chris)**

08:15 AM – 9:00 AM | Microsoft Cloud for Retail Overview

(Chris)

9:00 AM – 9:30 AM | Microsoft Cloud Solution Center **(Sonal)**

9:30 AM – 9:40 AM | Break

9:40 AM – 12:00 PM | Lab 01: Seamless Customer Service **(Tad)**

Day 2

08:00 AM – 9:00 AM | Lab 03: Teams Integration with D365 Commerce **(Tad)**

9:00 AM – 9:10 AM | Break

9:10 AM – 9:30 AM | Lab 01: Seamless Customer Service **(Tad)**

9:30 AM – 10:45 AM | Lab 04: Intelligent Order Management **(Sonal)**

10:45 AM – 11:00 AM | Break

11:00 AM – 12:00 PM | Lab 05: Retail Churn Model **(Sonal)**

Microsoft Cloud for Retail in a Day

ABOUT

An **8-hour foundational training course** that educates Microsoft customers, partners, and employees about the Microsoft Cloud for Retail and **how to implement and configure various scenarios** after installation.

VALUE

Proven and scalable method of upskilling engineering, sales, and supporting roles on Industry Cloud **offering, licensing, capability, and interoperability** with current and emerging standards

ACHIEVE

Functional and technical sessions that provide basis for working knowledge of offering, followed by a series of **step-by-step interactive labs** that demonstrate configurations to fit customer scenarios.

IMPACT

Globally scale out and upskill Microsoft customers, partners, and employees on the Microsoft Cloud for Retail. Create **opportunity for feedback** directly from the ecosystem to product engineering.

Training Goals

LEARN

Core functionality

Installation process

IMPLEMENT

Configure Cloud solutions

Extend Retail applications

Integrate with Azure & M365

Meet your Instructors

Tad Thompson

Sr. Cloud Solution Architect
GPS US

Sonal Bordia

Sr. Cloud Solution Architect
GPS US

Chris Donlan

Industry Cloud Architect
GPS US

Lab Resources

- GitHub: Lab Documents and Resources

  - microsoft/IndustryClouds · GitHub

- Information File contains the following:

  - GitHub Link

  - Users & Environments

  - Feedback Survey Link

Lab Documents

- ## Presentations
  - 0 – Introduction & Lab Overviews
  - 1 – Microsoft Cloud for Retail Overview
  - 2 – Microsoft Cloud Solution Center

- ## Lab Resource File
  - MC4R-Clarity.zip

- ## Lab Documents
  - Training Information
  - Lab 01 – Seamless Customer Service
  - Lab 02 – Microsoft Clarity
  - Lab 03 – Teams Integration with D365 Commerce
  - Lab 04 – Intelligent Order Management
  - Lab 05 – Retail Churn Model

Lab Details

- **Account:** MCRInADay_xx
- **Login:** mcriaduserXX@PowerPlatformOpenHacks.onmicrosoft.com
- **Password:** ln@Day092722
- **CE Site:** https://mcrinaday-XX-pcg.crm.dynamics.com

Next Session:

Module 1

Microsoft Cloud for
Retail Overview

Microsoft

Next Session:

Module 2

Microsoft Cloud Solution Center Overview

■■ Microsoft

Next Session:

Lab 1

Seamless Customer Service

Microsoft

Retail Story

Differentiated needs. Tailored experiences.

Monica is always on her laptop/mobile and prefers to do online shopping**. S**he orders an item online and then realizes that she has ordered it by mistake, so she escalates the conversation to a human agent to cancel her recent order and inquire about return conditions.

Fabrikam Retail UK and Fabrikam Retail US configures Microsoft Clarity to understand how their customers are using their legacy and D365 Commerce e-commerce sites.

Fabrikam Retail is providing front line workers such as **Elizabeth** the ability to execute tasks locally with clear, detailed directions from HQ/Operations.

Fabrikam Retail configures Intelligent Order Management to manage the lifecycle of an order generated on a third-party e-commerce platform BigCommerce.

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Seamless Customer Service

Shopper and Operations Analytics

Retail Workforce Management
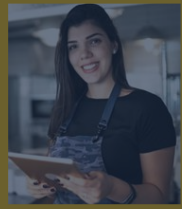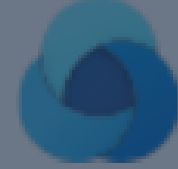
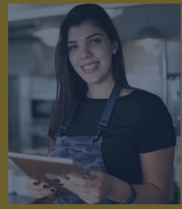Flexible Fulfilment

Retail Churn Model

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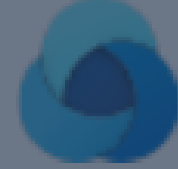
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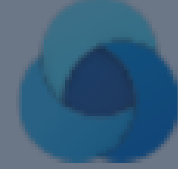
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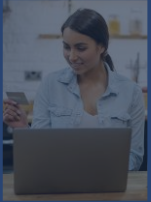
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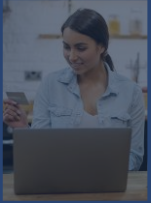
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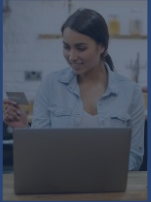
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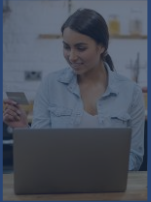Fabrikam Retail configures and executes Retail Churn model to accurately predict churn propensity by customer and by channel.

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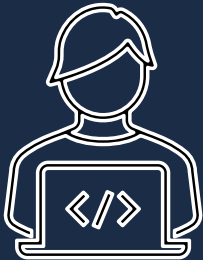
Developer/Administrator

Customer

Customer Service Agent

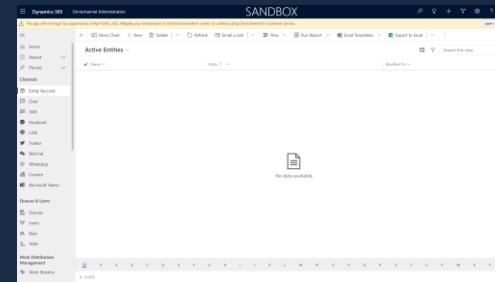# Lab 1: Seamless Customer Service

Developer/ Administrator
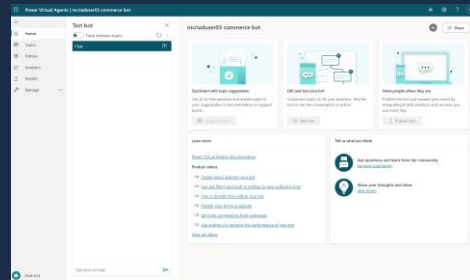
Power Virtual Agent

Task 1: Create a Chat bot

Task 2: Integrate PVA and Omnichannel for Customer Service

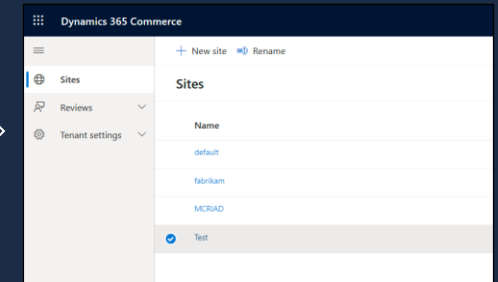Task 3: Configure hand-off scenario

Omnichannel Administration

Task 1: Assign Omnichannel Agent Security Role

Task 2: Create and Configure Omnichannel Queues

Task 3: Create a Live Work Stream with Context Variables and Routing Rules

Task 4: Create Chat Widget for Bot

Exercise 5: Configure Agent Scripts
Exercise 6: Configures Knowledge Articles

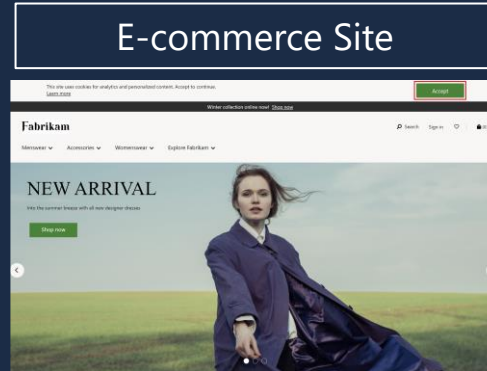## D365 Commerce Site Builder

Task 1: Create a site page

Task 2: Create and Publish URL

Task 3: Embed a Chat Widget into an e-Commerce Site Page
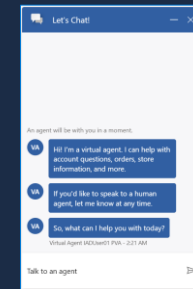
Lab 1: Seamless Customer Service

Customer

E-commerce Site

PVA Chat Bot

Task 1: Customer creates an account, logs into e-Commerce Site and places an order

Task 3: Customer chats with a PVA Bot and escalates to human agent

Omnichannel for Customer Service
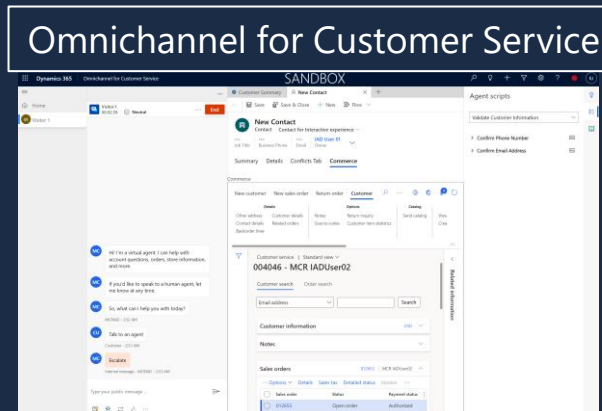
Customer Service Agent

Task 2: Agent logs into Omnichannel for Customer Service
Task 4: Agent Provides Personalized Service in Omnichannel for Customer Service with the Productivity Pane
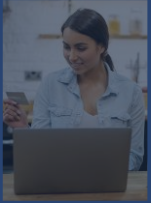
Next Session:

Lab 2
Microsoft Clarity

Microsoft

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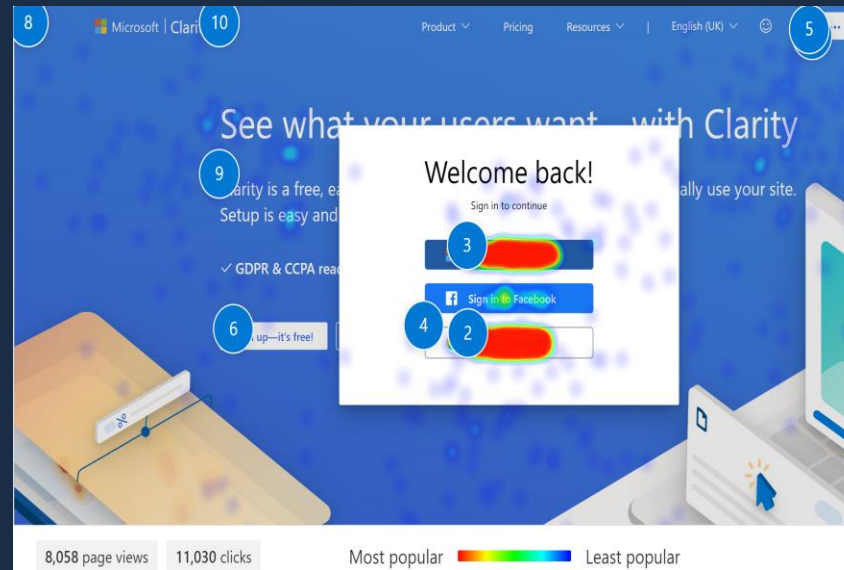# Lab 2: Microsoft Clarity

Session Playbacks
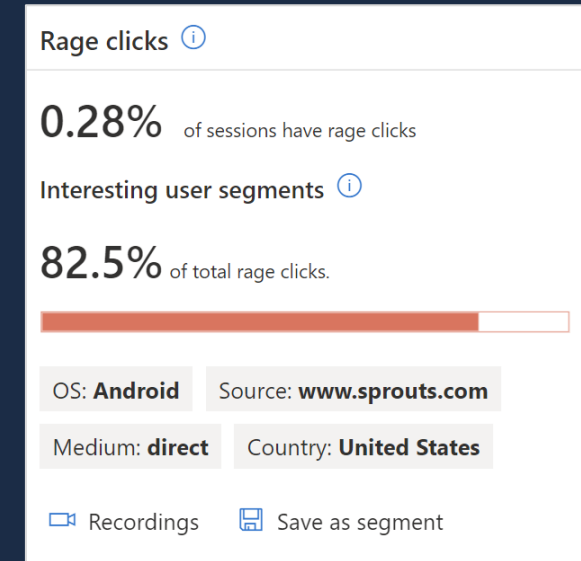
Watch and learn with pixel perfect playbacks

Heatmaps

Shows you where the action is at scale

Insights

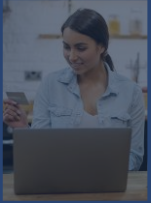Zero in on what matters

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Lab 3
Teams Integration with D365 Commerce

Microsoft

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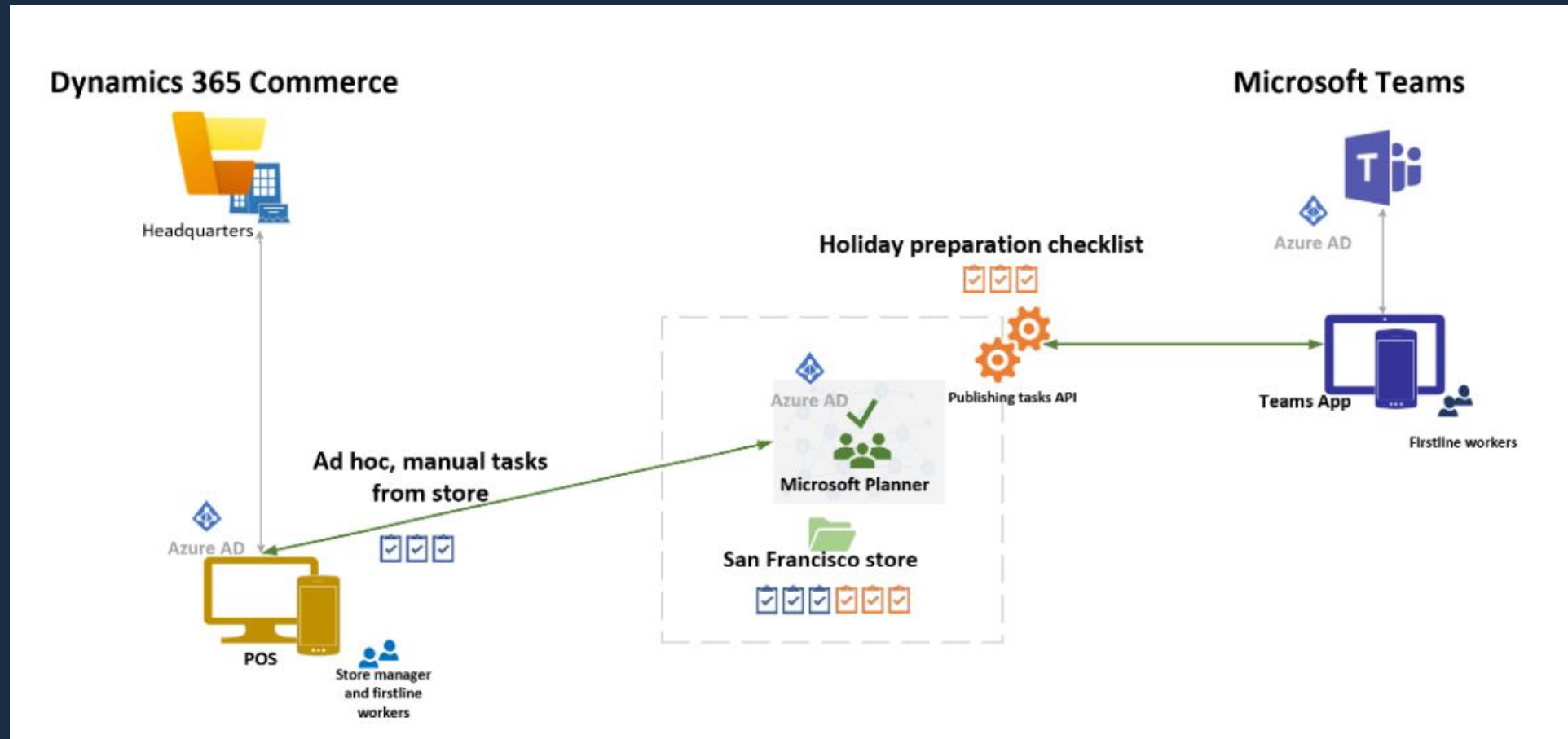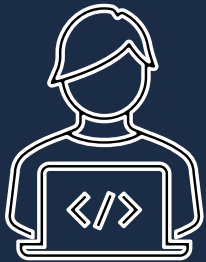
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Lab 3: Teams Integration with D365 Commerce

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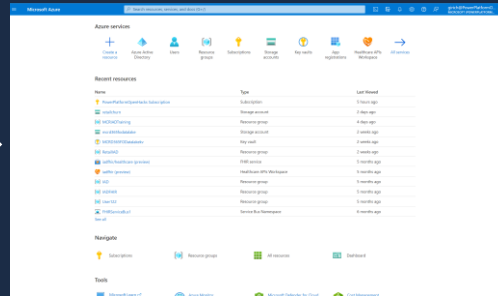IT Administrator

Retail Communications Manager
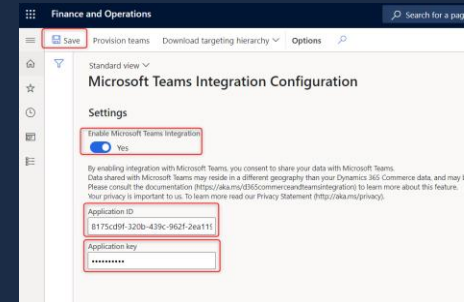
Store Manager

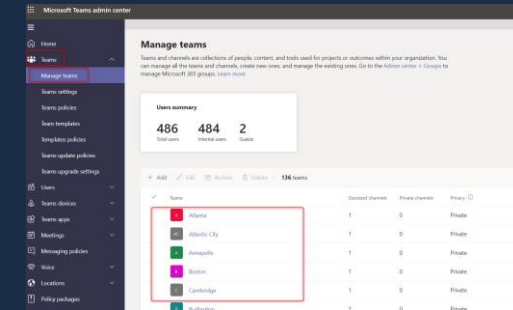Employee

Lab 3: Teams Integration with D365 Commerce

IT Administrator

Azure Portal

D365 Commerce

Microsoft Teams

Task 1: App Registration with Azure Active Directory
Task 2: Add a Secret to the registered App
Task 3: Add API permissions to the registered App
Task 4: Configure registered application to expose a web API
Task 5: Configure a client application to access a web API
Task 7: Add Delegated permissions to access Microsoft Graph
Task 8: Add Application permissions to access Microsoft Graph

Task 1: Create and external identity for the worker in D365 Commerce
Task 2: Add store manager to the Publisher Task Manager
Task 3: Provision Teams in Commerce Finance and Operations
Task 5: Download Commerce organizational hierarchy to Teams
Task 8: Link POS and Teams for task management

Task 4: Validate Teams provisioning in the Teams admin center
Task 6: Install Microsoft Teams PowerShell module
Task 7: Upload organization hierarchy to Teams.

Lab 3: Teams Integration with D365 Commerce

Retail Communications Manager
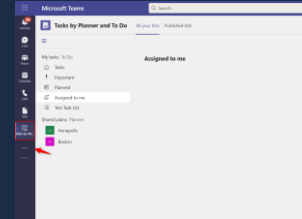
Task 1: Publish a task list in Teams to all/set of stores

Store Manager

View and Assign the tasks to store employee in D365 Commerce POS

Employee
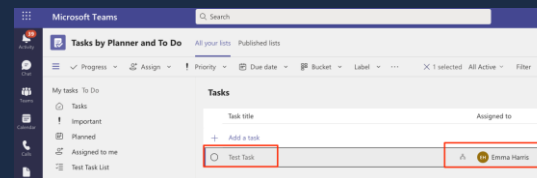
View and mark the assigned tasks as complete in Microsoft Teams

Next Session:

Lab 4
Intelligent Order Management

Microsoft

Lab 4: Intelligent Order Management

Microsoft Dynamics 365 Intelligent Order Management

Order Channels

Commerce & E-commerce Apps*

Mobile Apps   EDI

Retail & Social Marketplaces   CRM & Sales Apps*

Order Capture Connectors

Order Action Connectors

Fulfillment / Delivery Connectors

Journey Orchestration Designer

AI driven fulfillment optimization

Real time inventory visibility

Fulfillment Providers

WMS Systems   3PL/4PL

Stores   Drop-Ship

Delivery Providers

Parcel   Freight   Curbside Pickup   Lockers

* Can be used with Dynamics 365 and non-Dynamics 365 applications

Lab 4: Intelligent Order Management

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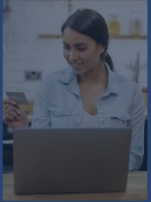
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Lab 5
Retail Churn Model

Microsoft

Next Session:

Lab 4
Intelligent Order Management

Sonal Bordia

■■ Microsoft

Lab 4: Intelligent Order Management

Microsoft Dynamics 365 Intelligent Order Management

Order Channels

Commerce & E-commerce Apps*

Mobile Apps

EDI

Retail & Social Marketplaces

CRM & Sales Apps*

Order Capture Connectors

Order Action Connectors

Fulfillment / Delivery Connectors

Journey Orchestration Designer

AI driven fulfillment optimization

Real time inventory visibility

Fulfillment Providers

WMS Systems

3PL/4PL

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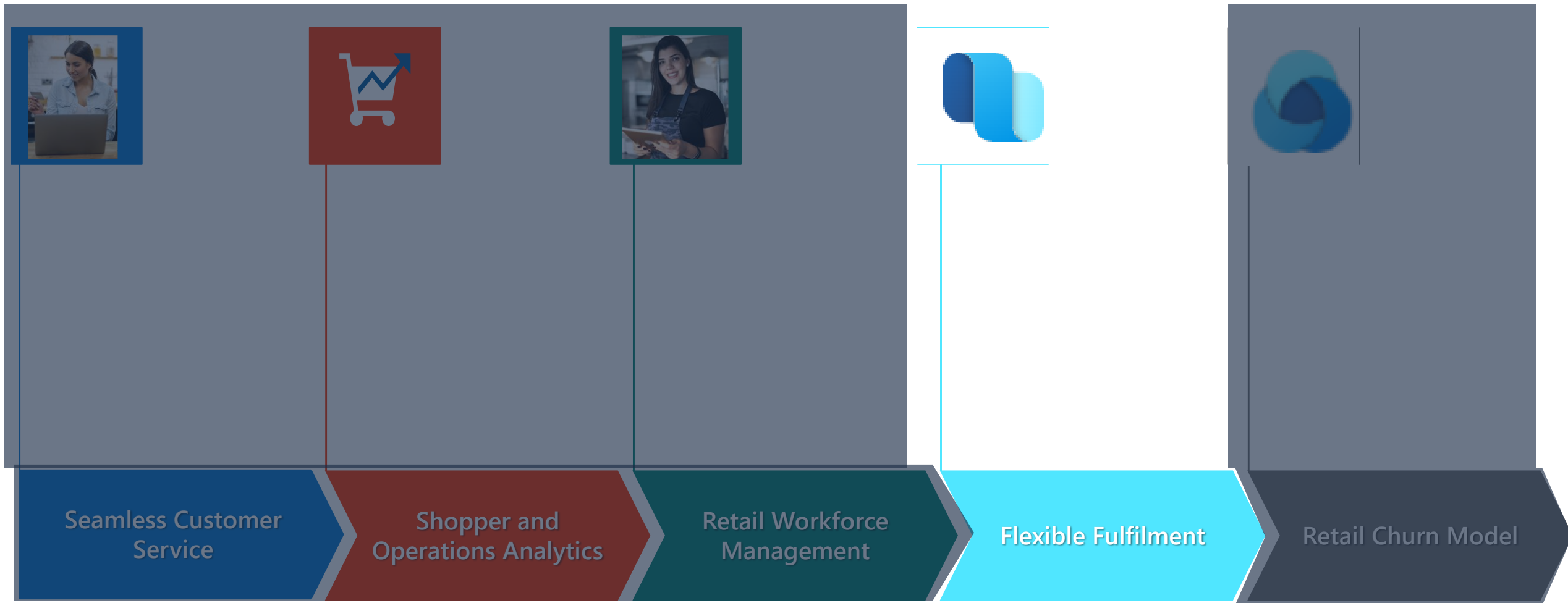
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Lab 5
Retail Churn Model

Sonal Bordia

■■ Microsoft

Maximize the value of your data

There are 40 petabytes of data generated every hour in retail,[1] but it's hard to unlock value

Customer touchpoints aren't linked to each other—systems and data are siloed and disconnected.

Marketing

Online Transactions

Customer Service

Consumer

In-store Transactions

Using retail data models, we're unifying disparate data sources and connecting data silos

Industry specificity: Leverage data models that includes retail-specific semantics
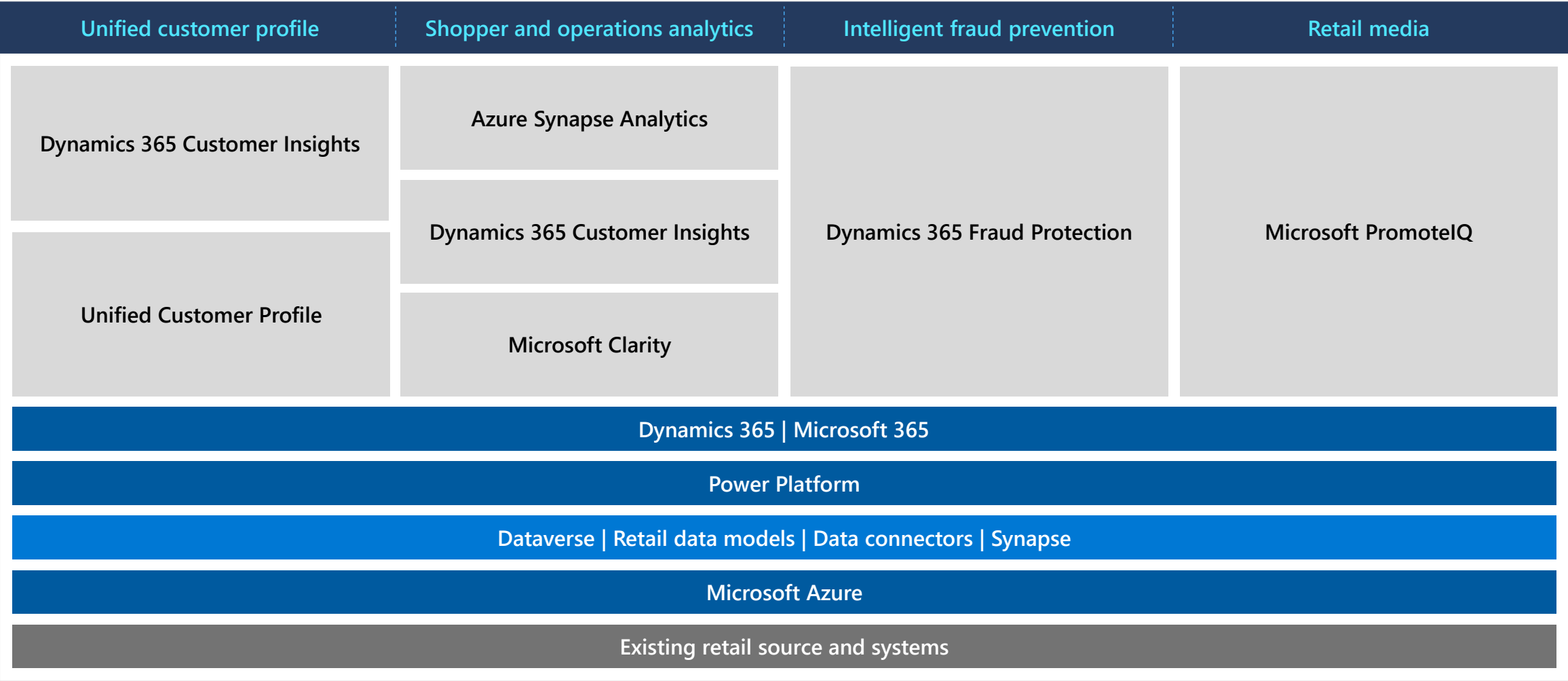
Interoperability: A data model can help ingest, enrich, and unify data, enabling faster time to value

Faster innovation: Extend the value of the platform with additional solutions, analytics, and predictions

Maximize the value of your data

Product dependencies

Unified customer profile	Shopper and operations analytics	Intelligent fraud prevention	Retail media
Dynamics 365 Customer Insights	Azure Synapse Analytics	Dynamics 365 Fraud Protection	Microsoft PromoteIQ
Unified Customer Profile	Dynamics 365 Customer Insights		
	Microsoft Clarity		

Dynamics 365 | Microsoft 365

Power Platform

Dataverse | Retail data models | Data connectors | Synapse

Microsoft Azure

Existing retail source and systems

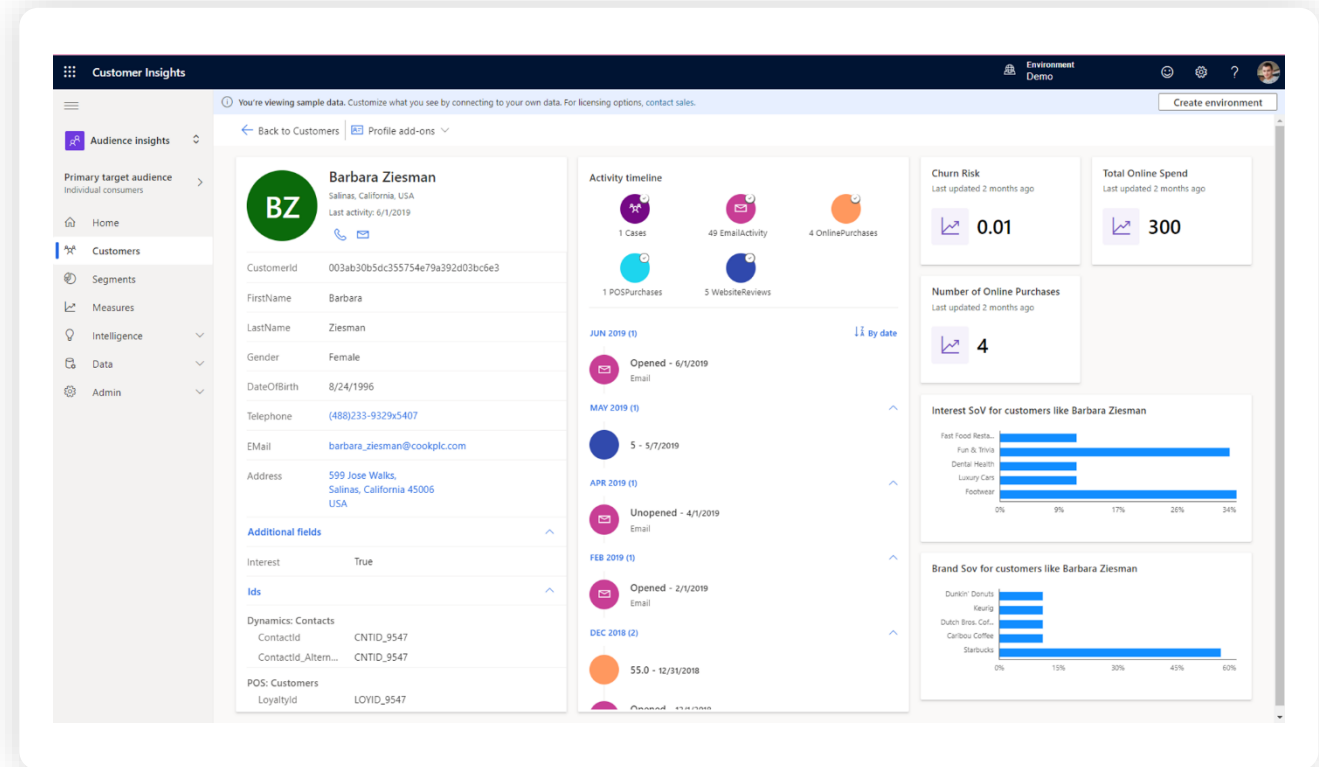# Unified customer profile (Pt. 1)

Gain insights across the complete view of a shopper's journey

Unification

- Bring multiple identities together to create a 360 view of the customer through AI-powered identity resolution
- Ingest multiple types of data, behaviors, and customer sentiment in real time via more than 500+ built-in connectors

Unique enrichment

- Gain a 360 view of the customer with proprietary audience intelligence from Microsoft Graph
- Leverage cross-channel behavior to complete the picture of your end-customer

Dependencies: Dynamics 365 Customer Insights | Unified Customer Profile

Unified customer profile (Pt. 2)

Gain insights across the complete view of a shopper's journey
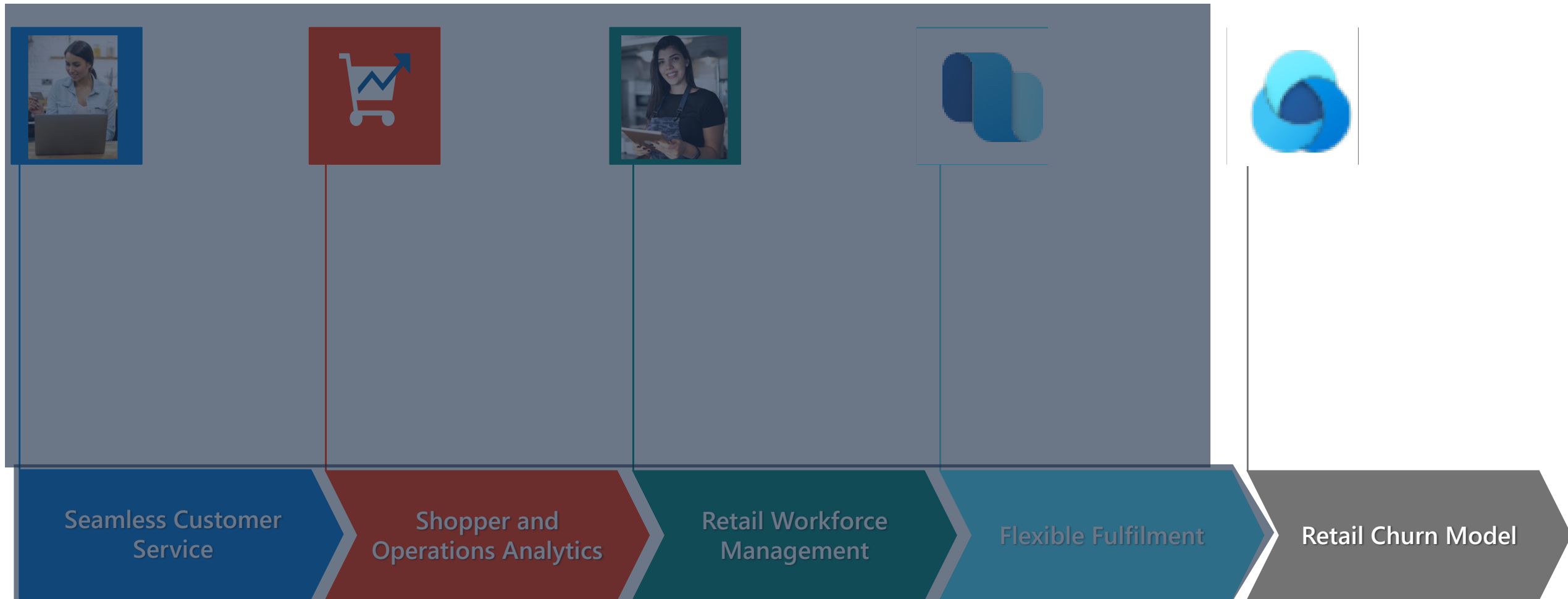
Insights

- Gain more nuanced insights by combining digital analytics with customer profiles to create richer segments, and leverage churn models to understand churn risk at a glance

- Observe customer progress through each defined step of the journey, quickly identifying obstacles and opportunities

- Create custom reports and views based on real-time customer behavior data, leverage built-in web and mobile analytics to predict customer needs
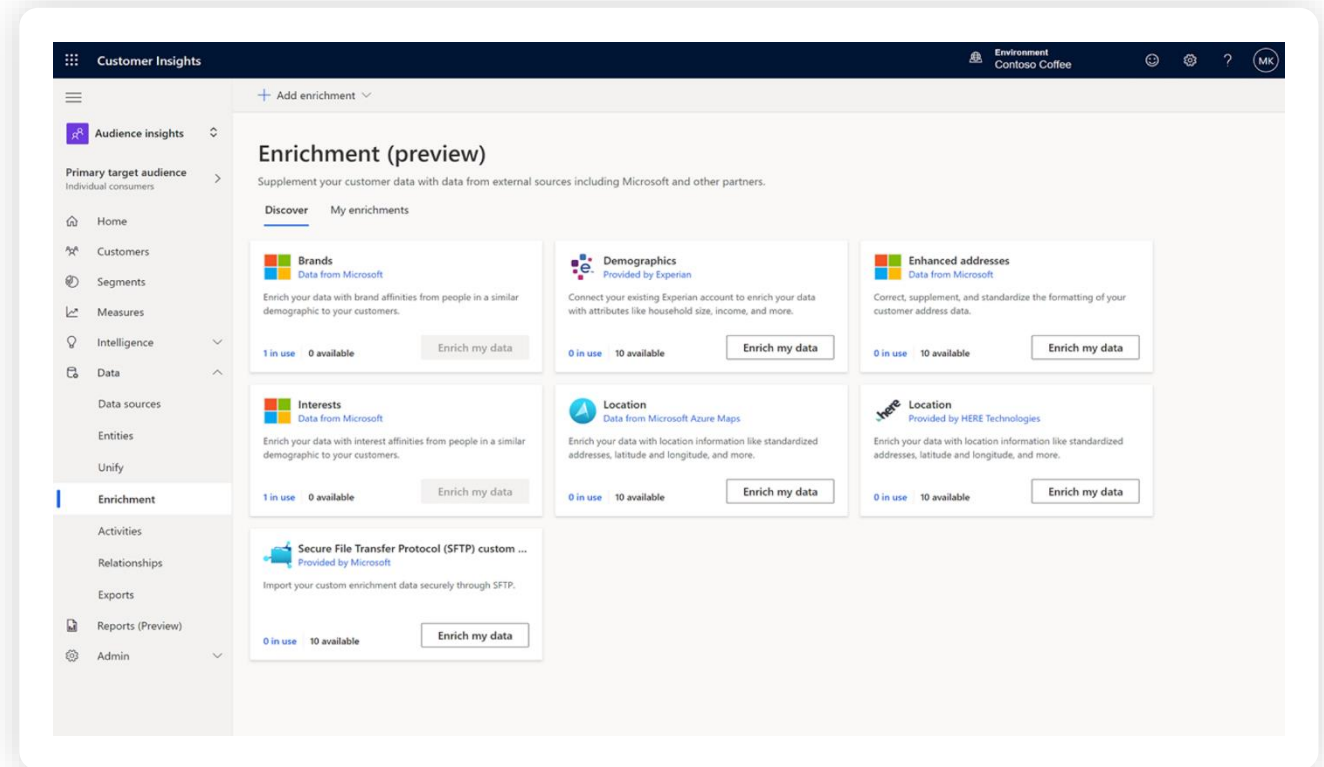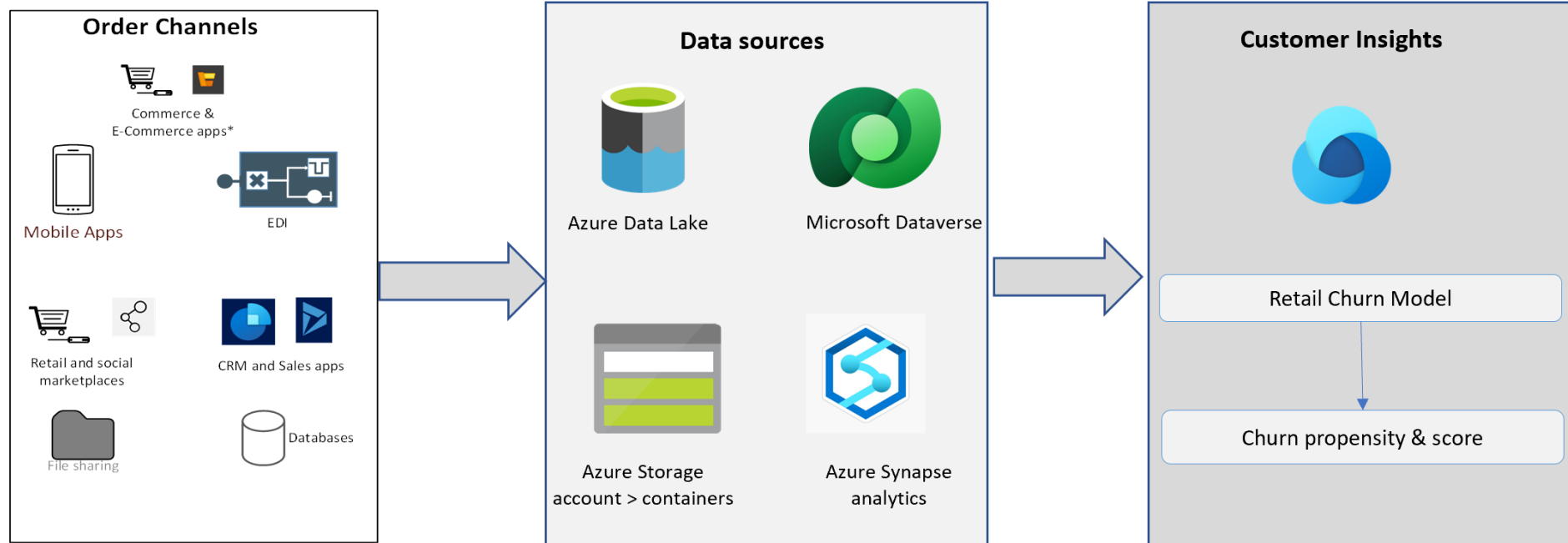
Trust, privacy, and consent

- Help build and uphold customer trust through Azure Purview with advanced security capabilities including a cookie-less future, consent across workflows, sensitive data security, and regulation compliance

Dependencies: Dynamics 365 Customer Insights | Unified Customer Profile

Differentiated needs. Tailored experiences.

| Seamless Customer Service | Shopper and Operations Analytics | Retail Workforce Management | Flexible Fulfilment | Retail Churn Model |

Lab 5: Retail Churn Model

Lab Resources

- GitHub: Lab Documents and Resources
  - https://github.com/microsoft/IndustryClouds/tree/main/Retail
- Information File contains the following:
  - GitHub Link
  - Users & Environments

Retail Story

Differentiated needs. Tailored experiences.

Monica is always on her laptop/mobile and prefers to do online shopping. She orders an item online and then realizes that she has ordered it by mistake, so she escalates the conversation to a human agent to cancel her recent order and inquire about return conditions.

Fabrikam Retail UK and Fabrikam Retail US configures Microsoft Clarity to understand how their customers are using their legacy and D365 Commerce e-commerce sites.

Fabrikam Retail is providing front line workers such as **Elizabeth** the ability to execute tasks locally with clear, detailed directions from HQ/Operations.

Fabrikam Retail configures Intelligent Order Management to manage the lifecycle of an order generated on a third-party e-commerce platform BigCommerce.
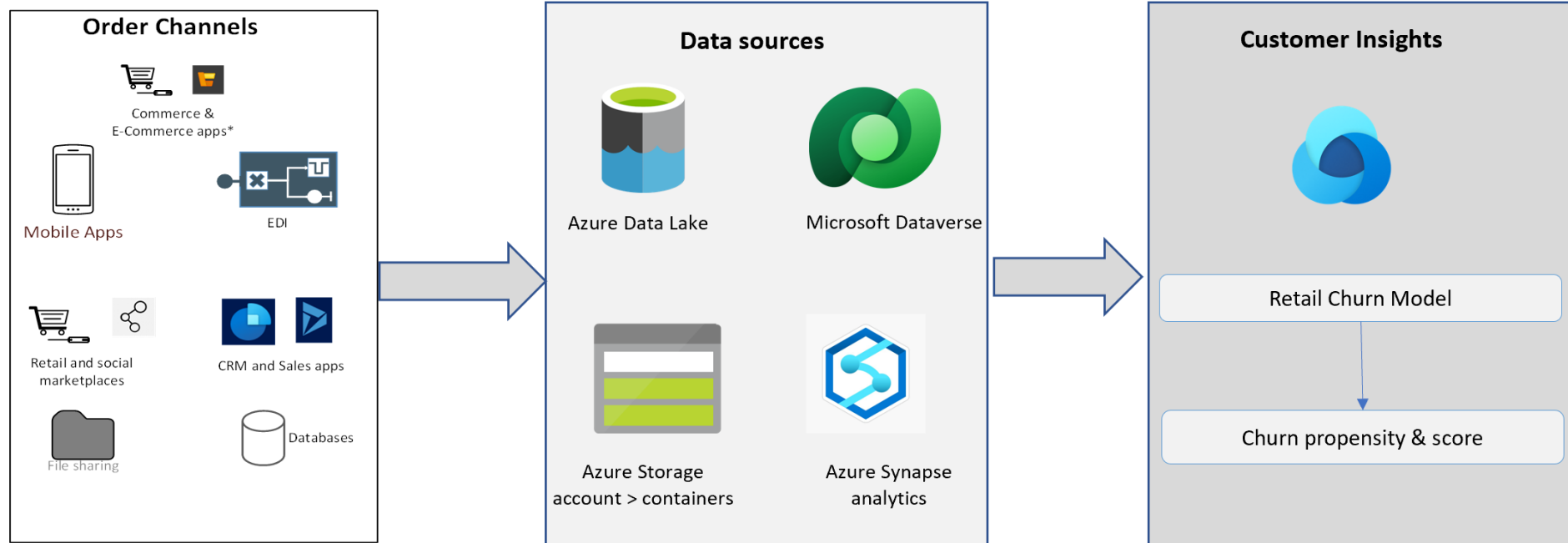
Fabrikam Retail configures and executes Retail Churn model to accurately predict churn propensity by customer and by channel.

| Seamless Customer Service | Shopper and Operations Analytics | Retail Workforce Management | Flexible Fulfilment | Retail Churn Model |

Lab 5: Retail Churn Model

Congratulations!

You have completed the Microsoft Cloud for Retail in a Day training course!

Please fill out a short survey to provide feedback ☺ Thank you!

https://aka.ms/MCRLabSurvey0422

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