



Microsoft Cloud for Retail in a Day



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.



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

Training Agenda



Time zone: PDT

Day 1

07:00 AM – 07:15 AM | Introduction **(Chris)**

07:15 AM – 8:00 AM | Microsoft Cloud for Retail Overview
(Chris)

8:00 AM – 8:30 AM | Microsoft Cloud Solution Center **(Sonal)**

8:30 AM – 8:40 AM | Break

8:40 AM – 10:40 AM | Lab 01: Seamless Customer Service **(Tad)**

10:40 AM – 011:00 AM | Break

11:00 AM – 11:30 AM | Lab 02: Microsoft Clarity **(Chris)**

Day 2

07:00 AM – 07:30 AM | Lab 02: Microsoft Clarity(cont.) **(Chris)**

07:30 AM – 8:00 AM | Lab 03: Teams Integration with D365
Commerce **(Tad)**

8:00 AM – 8:10 AM | Break

8:10 AM – 9:45 AM | Lab 04: Intelligent Order Management **(Sonal)**

9:45 AM – 10:00 AM | Break

10:00 PM – 11:15 AM | Lab 05: Retail Churn Model **(Sonal)**

11:15 AM – 11:30 AM | Q&A and Feedback Session **(All)**

Training Goals



LEARN

Core functionality

Installation process



IMPLEMENT

Configure Cloud solutions

Extend Retail applications

Integrate with Azure & M365



Lab Resources



- **GitHub:** Lab Documents and Resources
 - <https://github.com/microsoft/IndustryClouds/tree/main/Retail>
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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

Next Session:

Module 1

Microsoft Cloud for Retail Overview

Chris Donlan



Next Session:

Module 2

Microsoft Cloud Solution Center Overview

Sonal Bordia



Next Session:

Lab 1

Seamless Customer Service

Tad Thompson



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.

Seamless Customer Service



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.

Shopper and Operations Analytics



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

Retail Workforce Management



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

Flexible Fulfilment



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

Retail Churn Model

Lab 1: Seamless Customer Service



Developer/Administrator



Customer

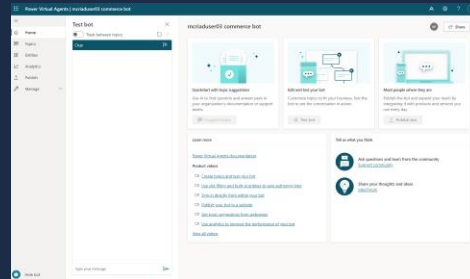


Customer Service Agent

Lab 1: Seamless Customer Service



Developer/
Administrator

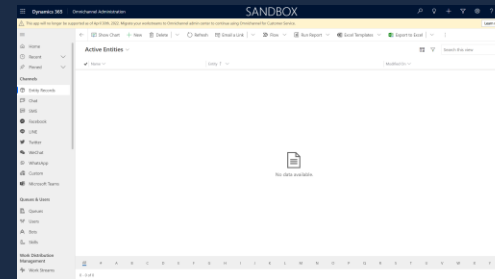


Power Virtual Agent

Task 1: Create a Chat bot

Task 2: Integrate PVA and Omnichannel for Customer Service

Task 3: Configure hand-off scenario



Omnichannel Administration

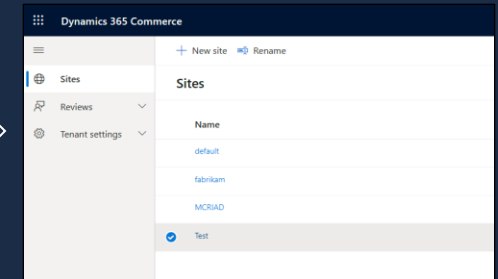
Task 1: Assign Omnichannel Agent Security Role

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: Configure Knowledge Articles



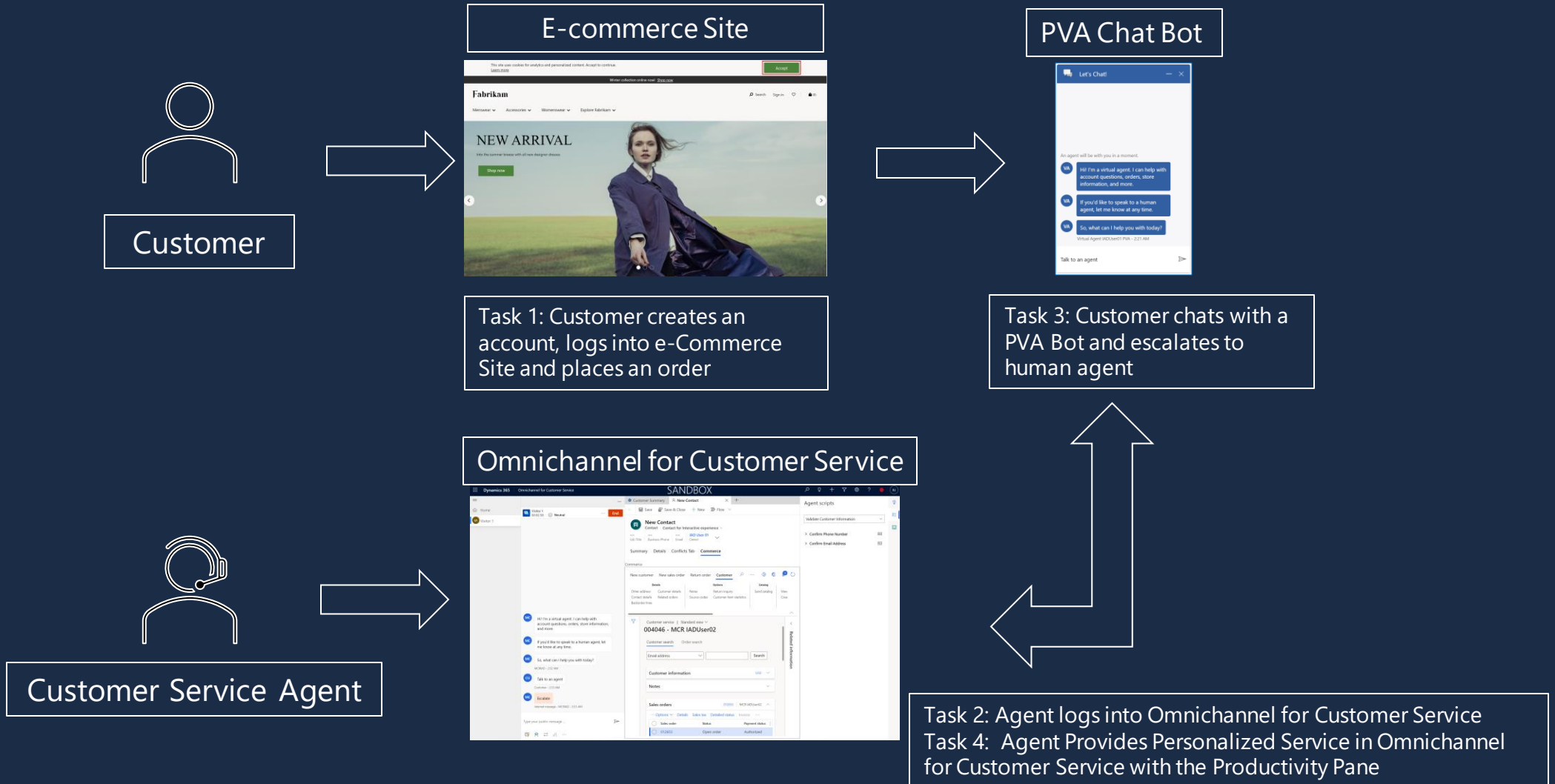
D365 Commerce Site Builder

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



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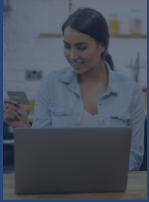
Microsoft Clarity

Chris Donlan



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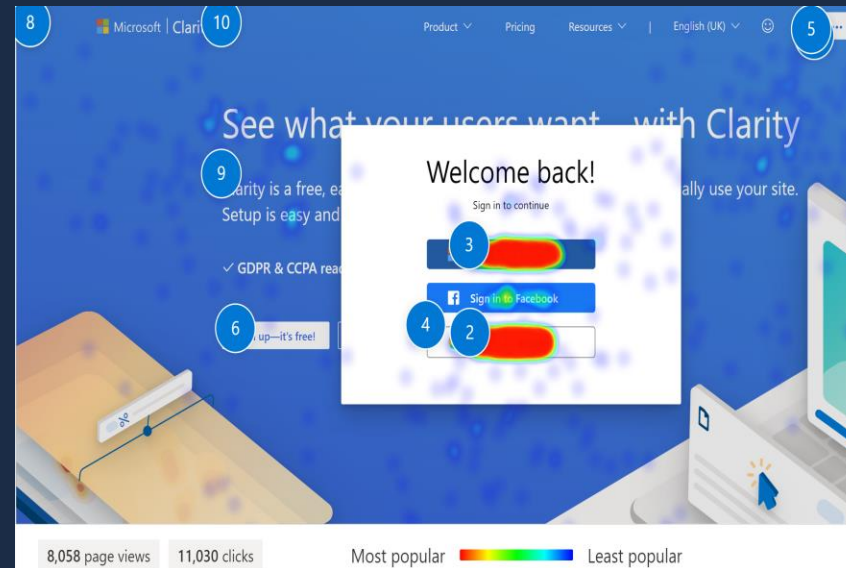


Session Playbacks



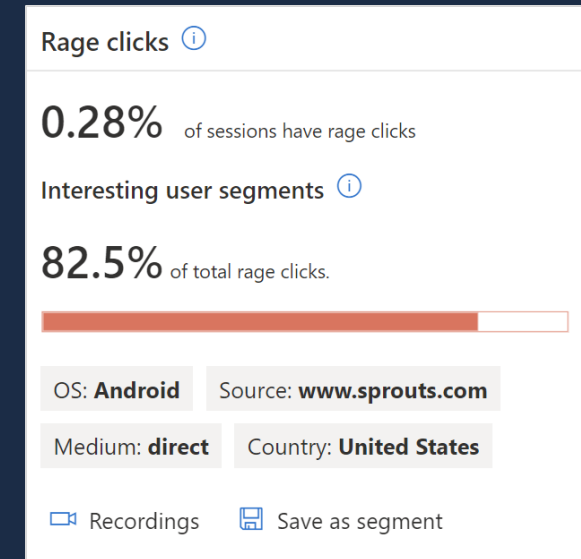
Watch and learn with pixel perfect playbacks

Heatmaps



Shows you where the action is at scale

Insights



Zero in on what matters

Next Session:

Lab 3

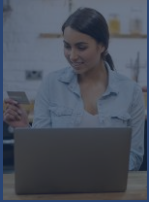
Teams Integration with D365 Commerce

Tad Thompson



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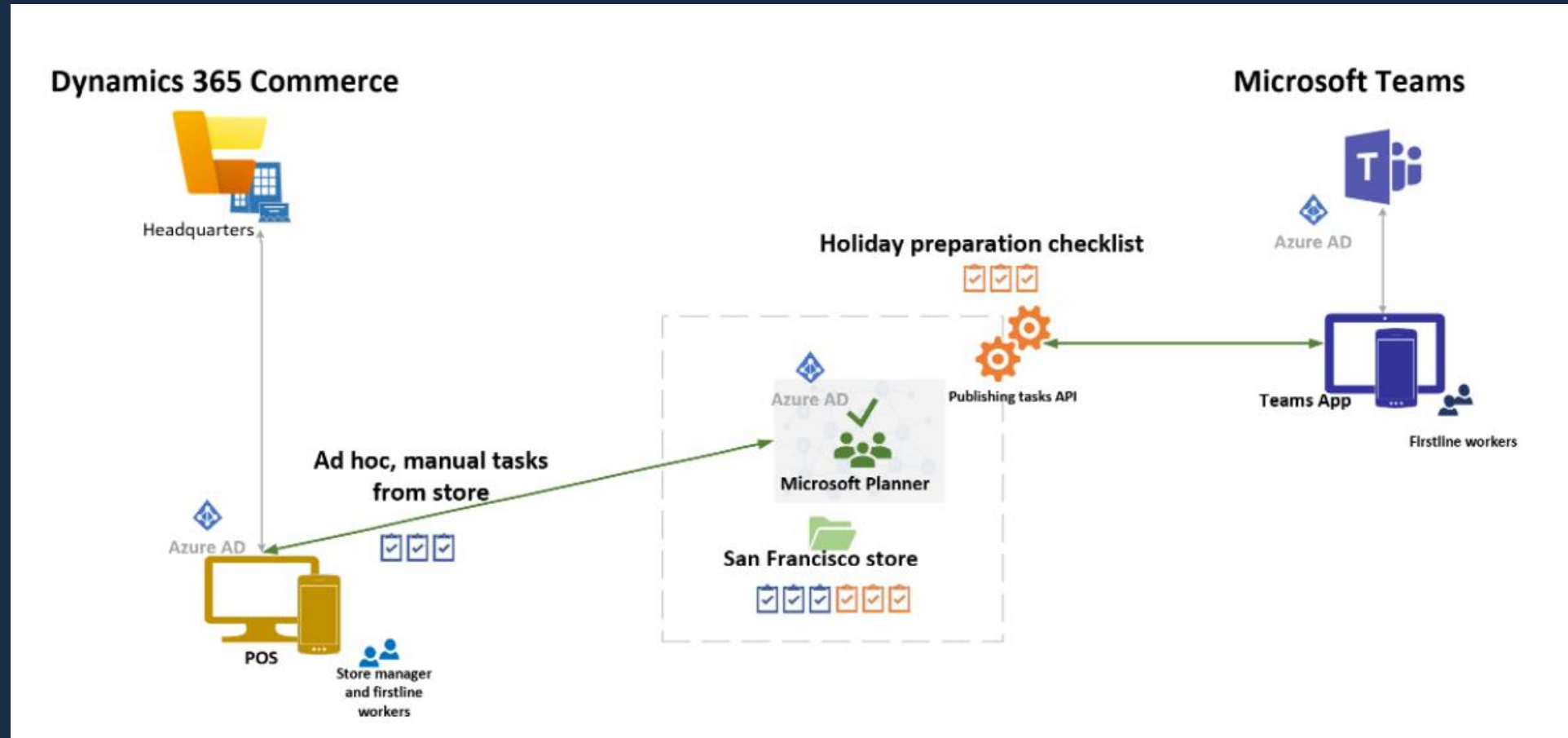
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Retail Churn Model

Lab 3: Teams Integration with D365 Commerce



Lab 3: Teams Integration with D365 Commerce



IT Administrator



Retail
Communications
Manager



Store Manager

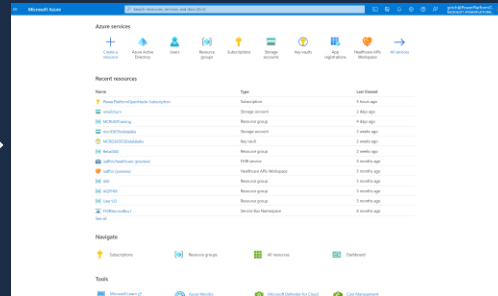


Employee

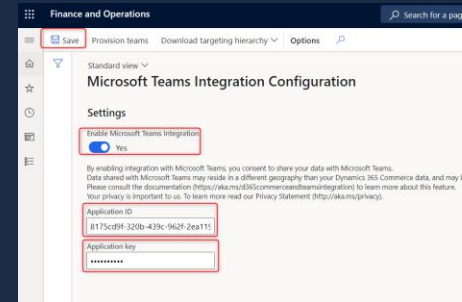
Lab 3: Teams Integration with D365 Commerce



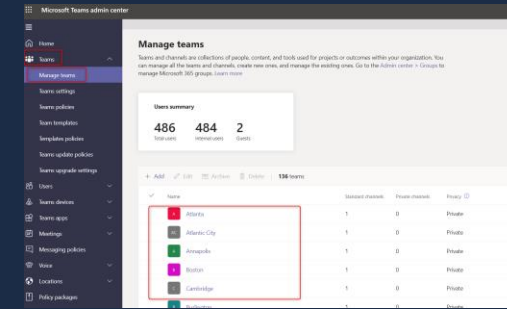
IT Administrator



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

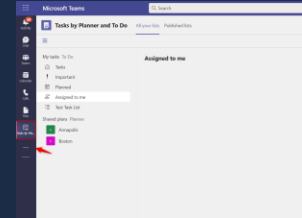
Task 1: Create and external identity for the worker in D365 Commerce
Task 2: Add store manager to the Publisher Task Manager
Task 3: Provision Teams in Commerce Finance and Operations
Task 5: Download Commerce organizational hierarchy to Teams
Task 8: Link POS and Teams for task management

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



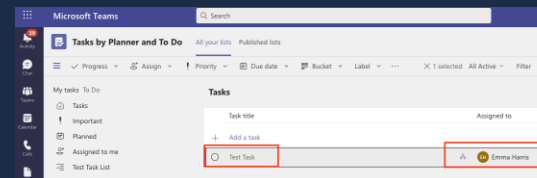
Store Manager



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:

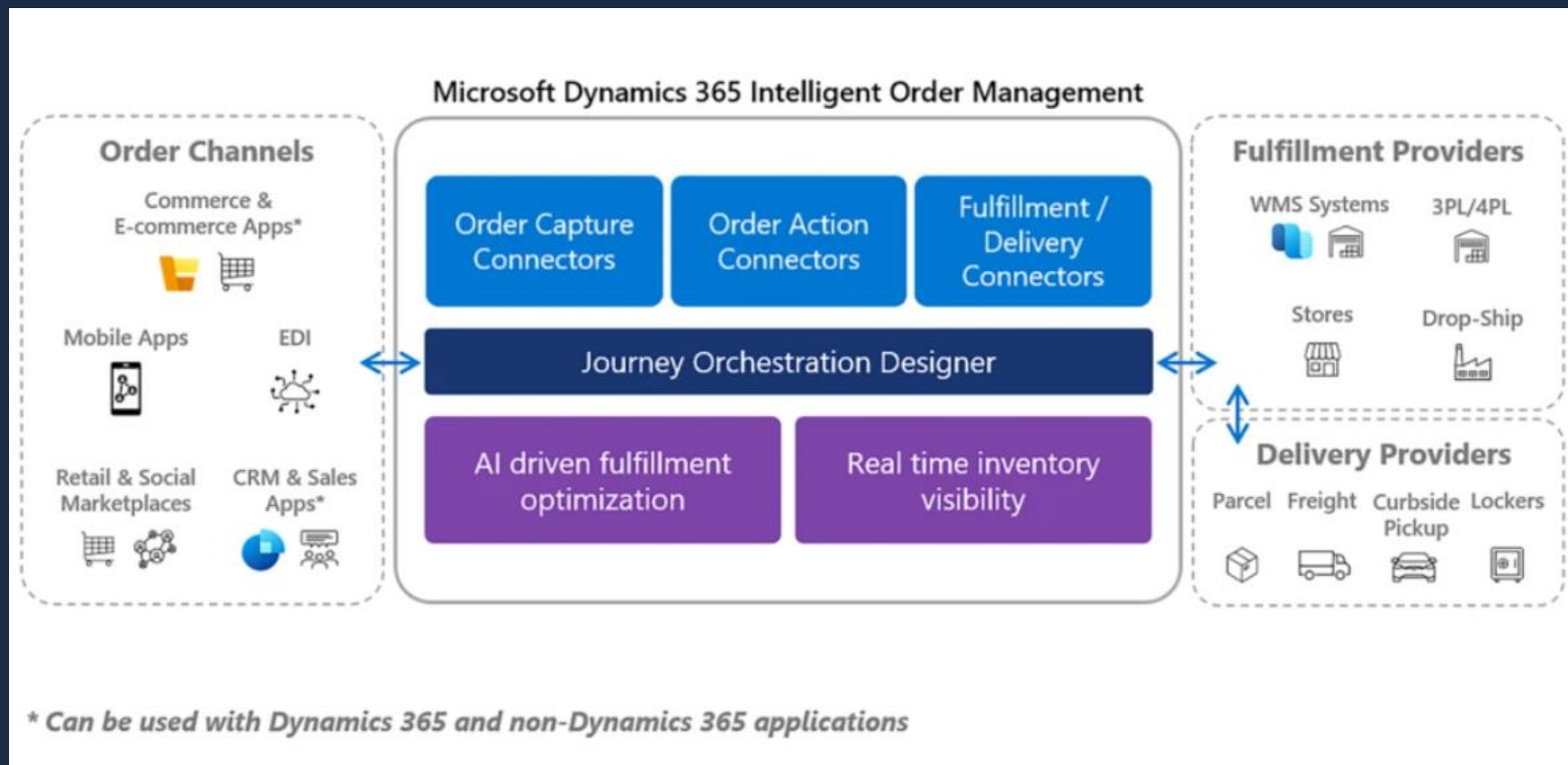
Lab 4

Intelligent Order Management

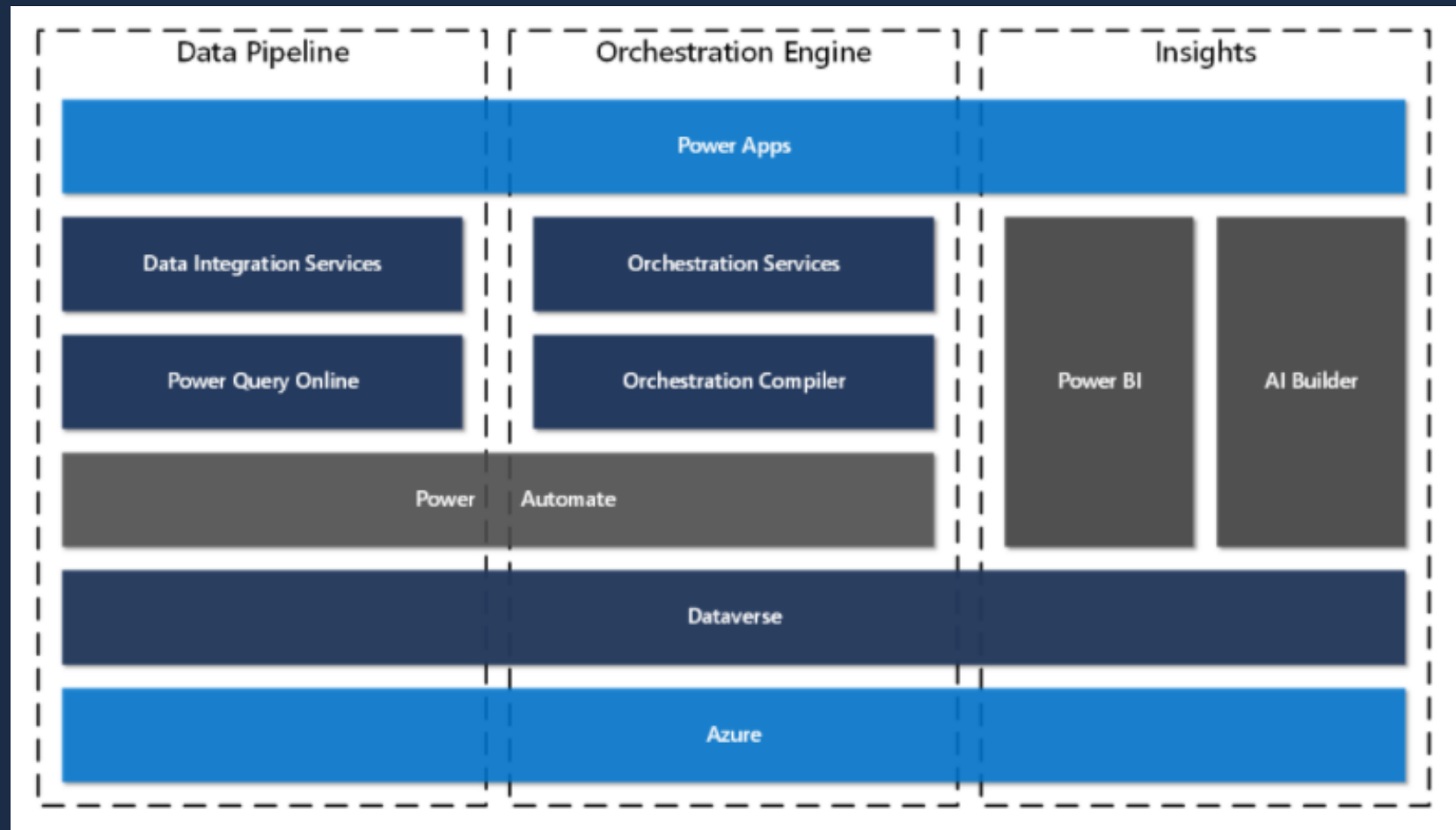
Sonal Bordia



Lab 4: Intelligent Order Management

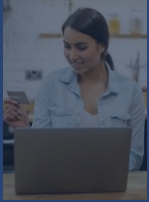


Lab 4: Intelligent Order Management



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Lab 5

Retail Churn Model

Sonal Bordia





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.



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

Industry specificity: Leverage data models that includes retail-specific semantics

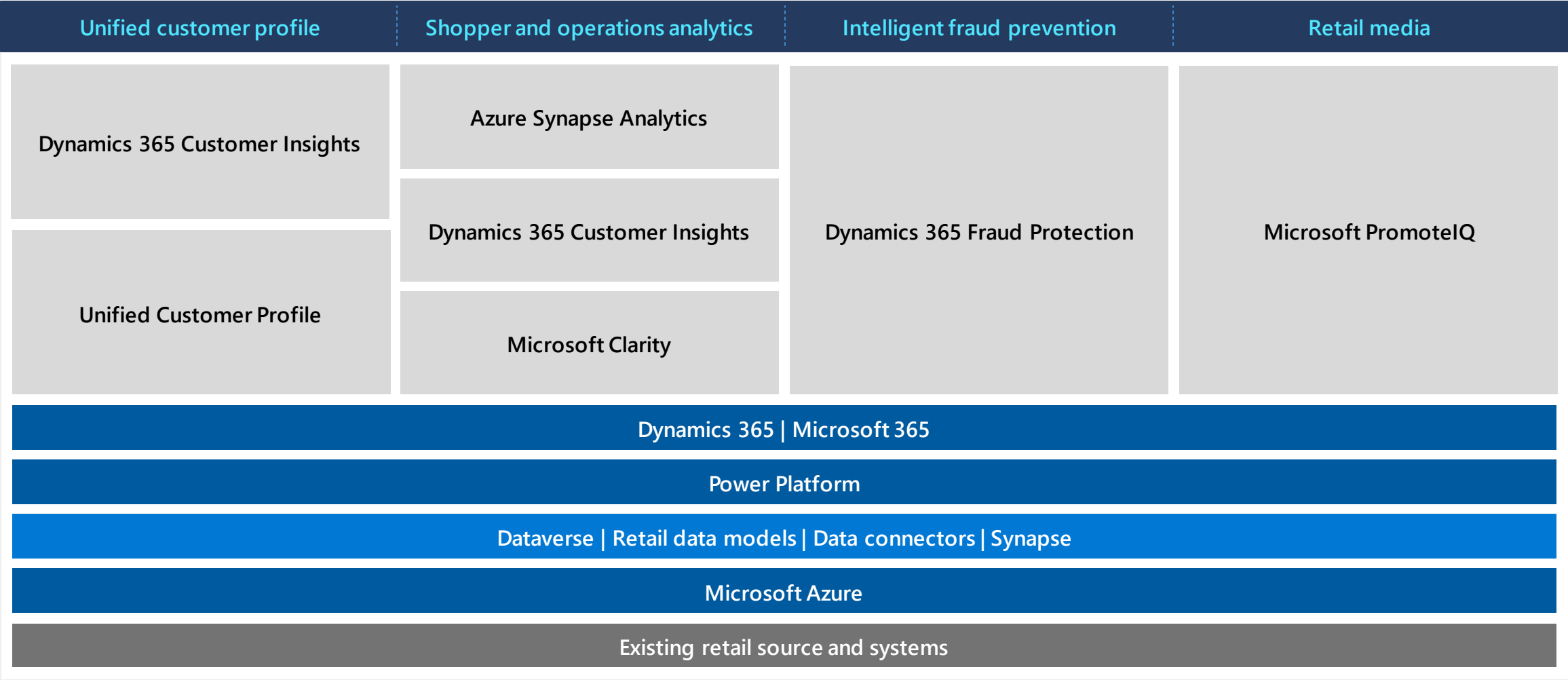
Interoperability: A data model can help ingest, enrich, and unify data, enabling faster time to value

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 (Pt. 1)

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

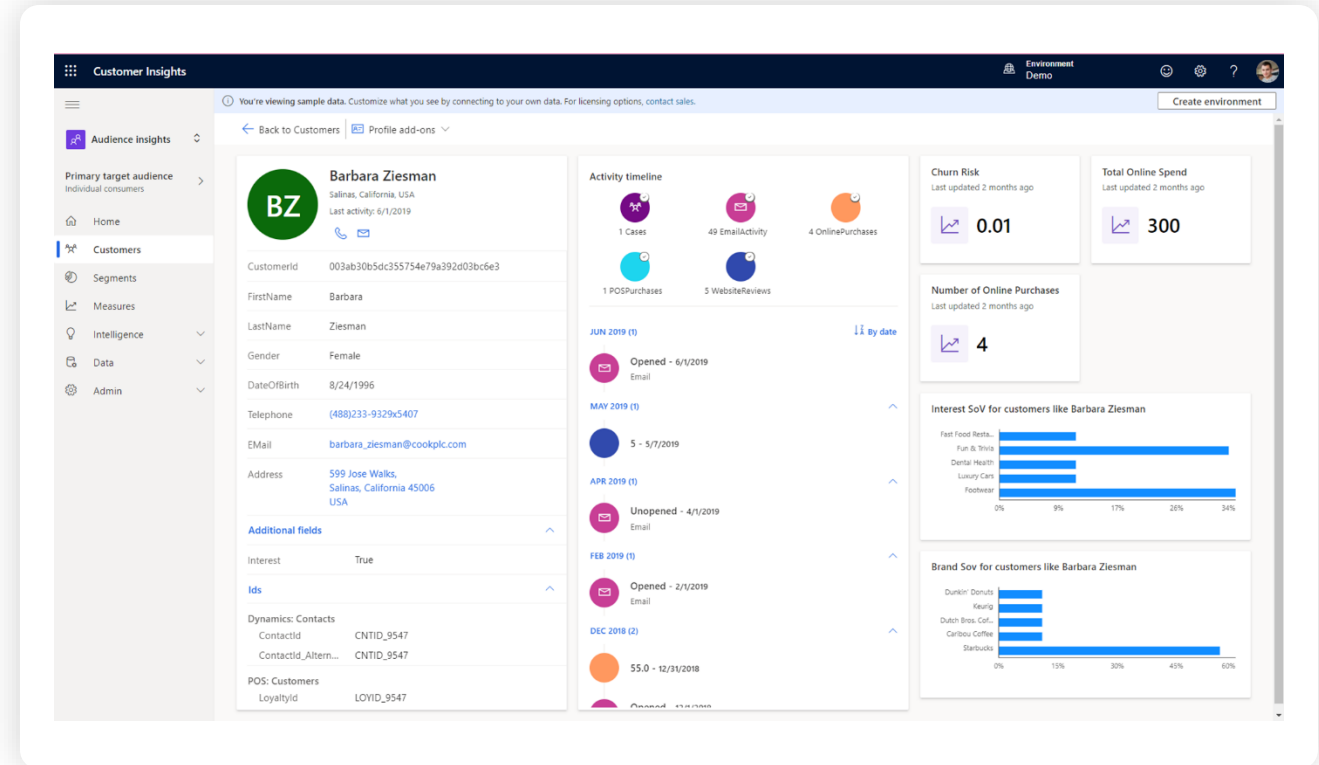


Unification

- 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



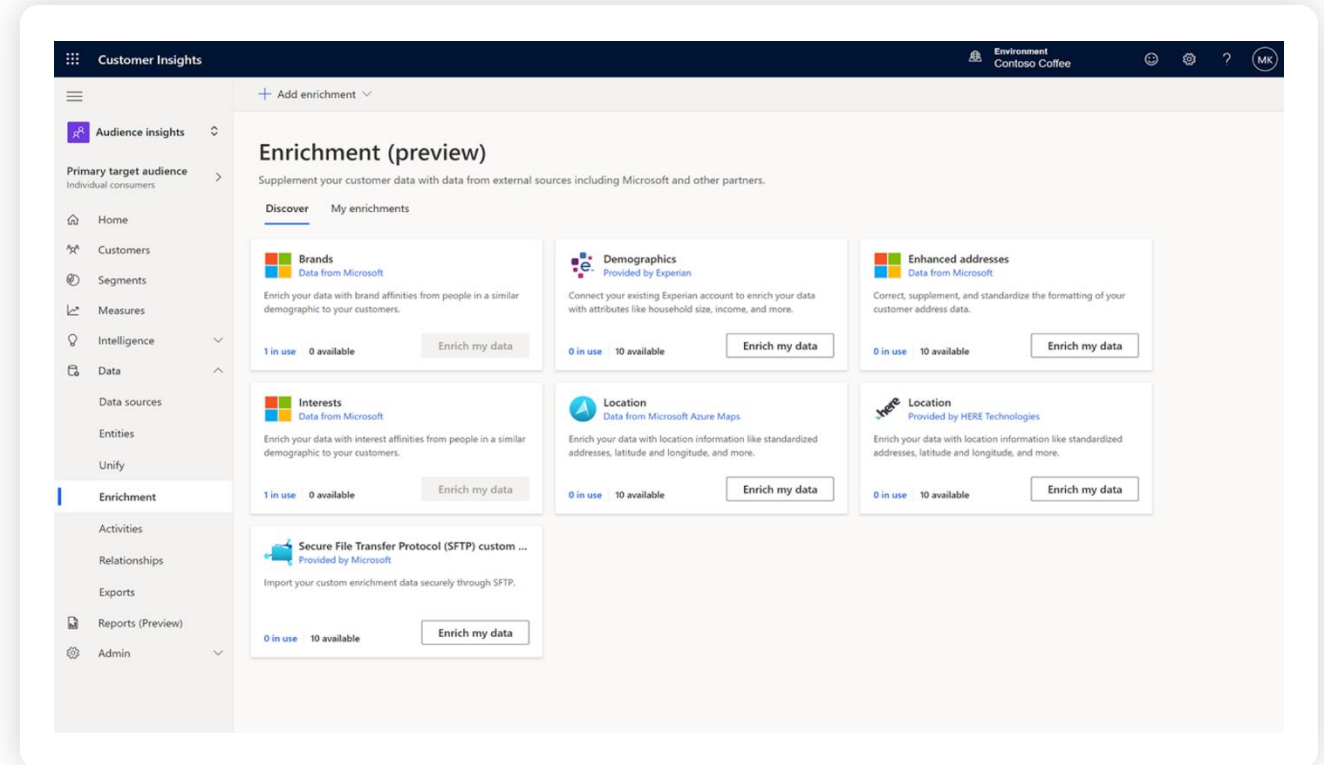
Unified customer profile (Pt. 2)



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

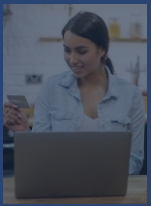


Trust, privacy, and consent

- 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

Retail Story

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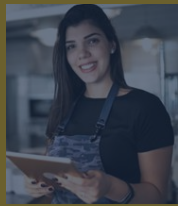
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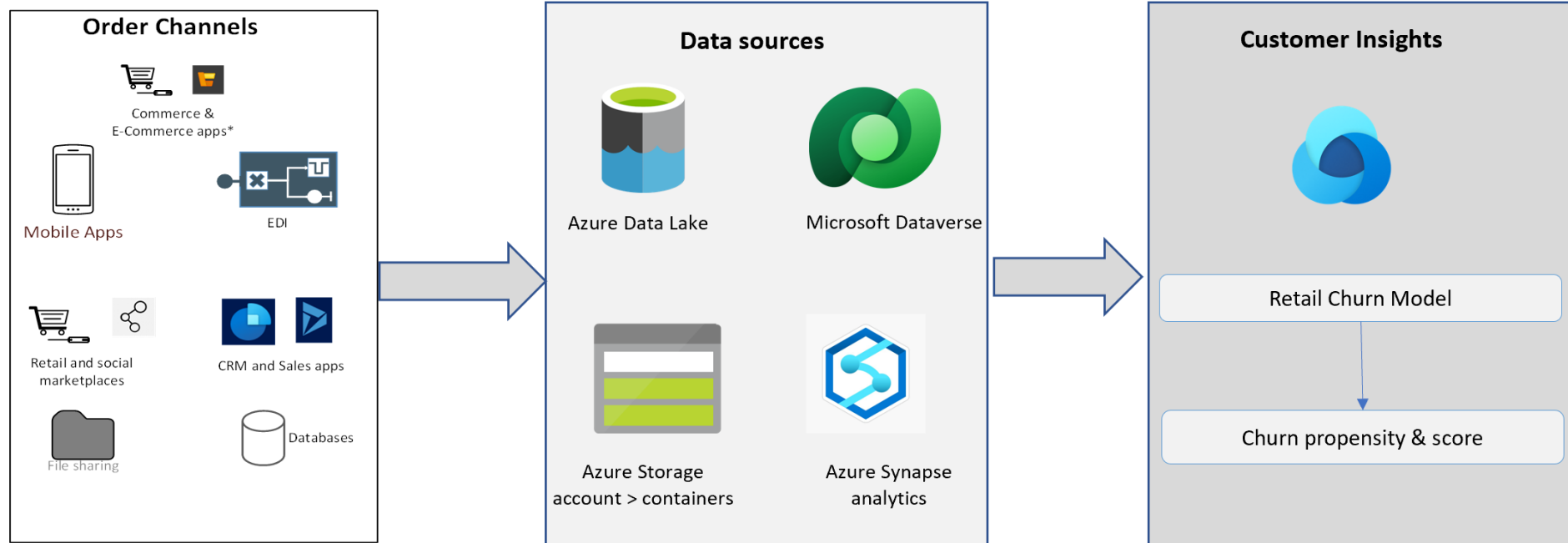
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Retail Churn Model

Lab 5: Retail Churn Model



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Q&A with Product PMs





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>

