



# Microsoft Cloud for Retail in a Day

Lab 01: Seamless Customer Service

Step-by-Step Lab

90 minutes

February 2022

# Contents

Overview .....	4
Learning Objectives .....	5
Retail Story .....	5
Prerequisites .....	6
Technologies Used.....	6
Power Virtual Agent.....	6
D365 Omnichannel for Customer Service Application.....	7
D365 Commerce E-commerce Site.....	7
Commerce Chat with D365 Omnichannel for Customer Service .....	7
Exercise 1: Extend PVA with Custom Scenarios .....	9
Task 1: Create a Chat bot.....	9
Task 2: Integrate PVA and Omnichannel for Customer Service.....	10
Task 3: Configure hand-off scenario .....	12
Exercise 2: Configure Omnichannel Live Chat .....	15
Task 1: Assign Omnichannel Agent Security Role.....	15
Task 2: Create and Configure Omnichannel Queues .....	18
Task 3: Create a Live Work Stream with Context Variables and Routing Rules.....	24
Task 4: Create Chat Widget for Bot .....	30
Exercise 3: Embed Chat Widget in E-commerce Site .....	31
Task 1: Create a site page .....	32
Task 2: Create and Publish URL.....	34
Task 3: Embed a Chat Widget into an e-Commerce Site Page.....	37
Exercise 4: Experience Escalation & Smart Assist Features .....	42
Task 1: Customer creates an account, logs into e-Commerce Site and places an order .....	43
Task 2: Agent logs into Omnichannel for Customer Service.....	49
Task 3: Customer Escalates through PVA Bot.....	52
Task 4: Agent Provides Personalized Service in Omnichannel for Customer Service with the Productivity Pane .....	54
Exercise 5: Configure Agent Scripts .....	61
Task 1: Assign Productivity Tools Administrator Role .....	63
Task 2: Create an Agent Script .....	67
Task 3: Create a Session Template and associate the Agent Script to it.....	70

Exercise 6: Configure Knowledge Articles.....	76
Task 1: Assign Knowledge Manager User Role.....	76
Task 2: Set up Knowledge Management Settings .....	78
Task 3: Create Knowledge Article.....	80
Task 4: Review and Publish Knowledge Article.....	86
Task 5: Publish your Knowledge Article.....	89
Summary.....	91

# Overview

One of the key priority scenarios that Microsoft Cloud for Retail addresses is to elevate the shopper experience. Customers demand an experience that is tailored to their tastes and respects their time and energy. Capabilities such as Seamless customer service can help foster strong customer relationships, increase online and offline cart size and drive loyalty.

## **Seamless Customer Service**

With this capability, you can eliminate problems before they arise, tailor customer engagements, and free up live agents to manage complex problems.

You can offer help anytime with AI-powered chatbots:

- Create AI-powered chatbots that can resolve common issues and answer questions 24 hours a day
- Integrate chatbots with the products and services allowing it to look up records, hand off conversations to live agents, and call APIs
- Create personalized conversations with distinct topics using natural language understanding and entity extraction
- Monitor and improve your chatbot's performance using AI and data-driven insights

You can also extend personalized assistance:

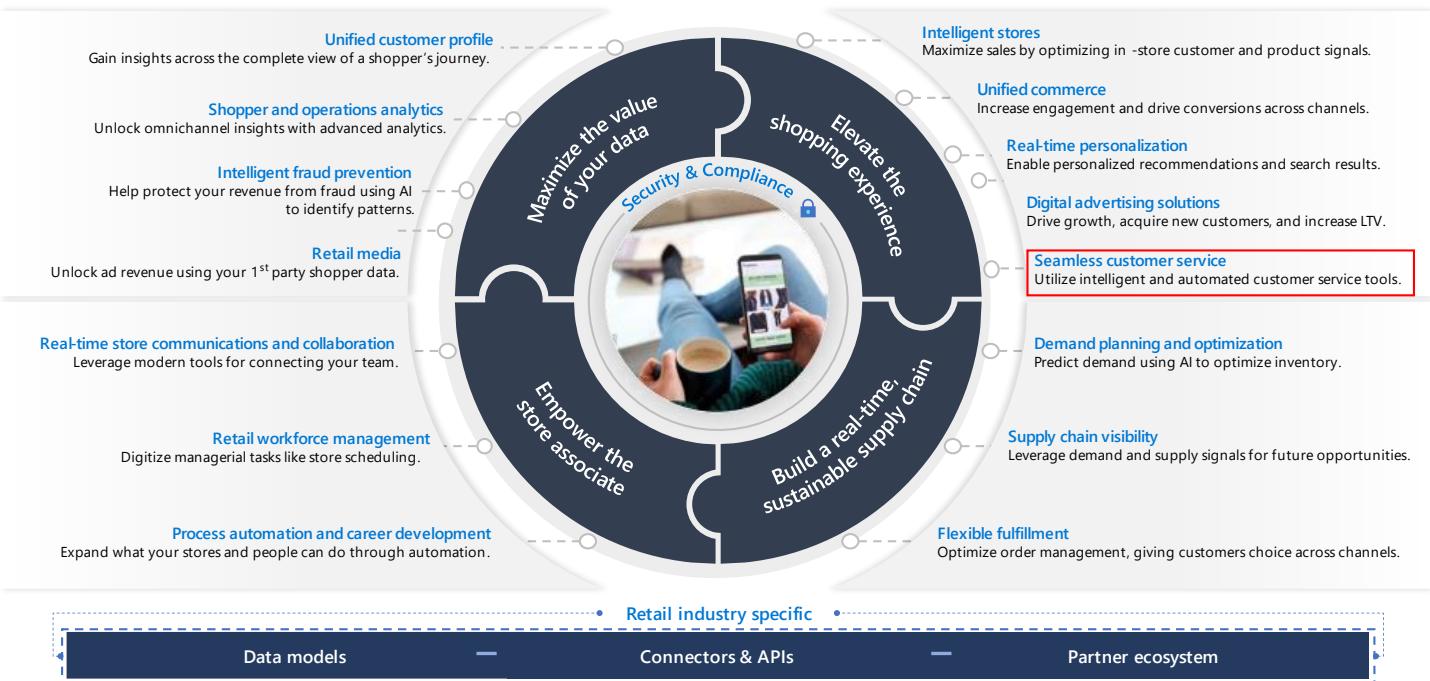
- Tailor customer engagement by providing at-a-glance customer history, and utilize AI to classify, prioritize, and assign customers across all channels to the most qualified agent

Further, you can provide smarter services:

- Elevate agent effectiveness with tools such as giving the option to work across multiple open cases and utilizing Microsoft Teams to connect with subject-matters experts
- Utilize the Internet of Things (IoT) to send remote commands to resolve issues quickly and to identify devices in need of attention
- Build custom workflows using Power Automate and create complex scenarios with Microsoft Bot Framework

Finally, you can empower customers to resolve issues on their own:

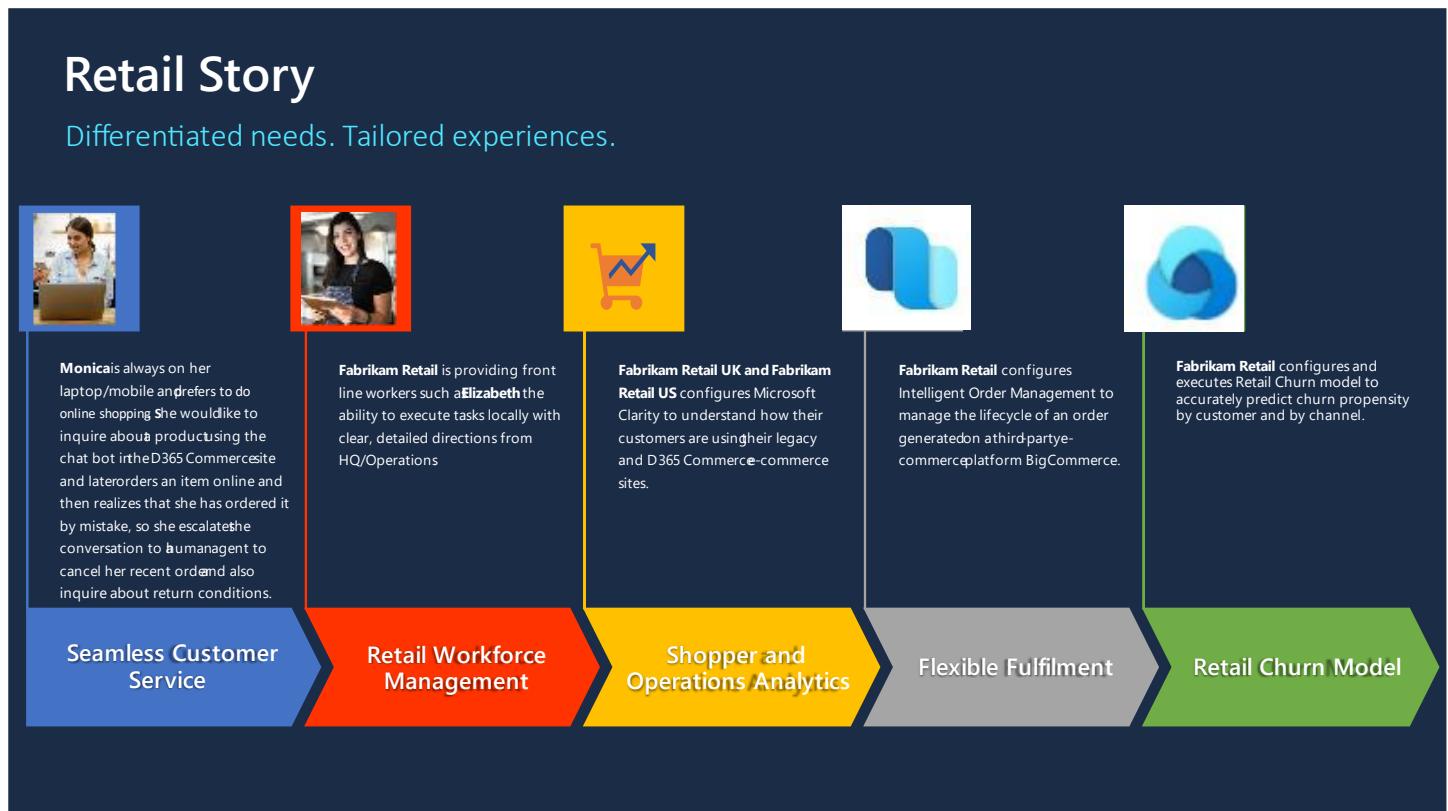
- Provide self-service support with virtual agents, knowledge base portals, and community support forums.



© 2020 Microsoft Corporation. All rights reserved.

## Learning Objectives

### Retail Story



This lab will focus on the retail story of Fabrikam Retail.

In the following exercises, you will be playing the role of a System Administrator, Developer, a Retail customer and a Customer Service Agent:

- Exercise 1 - You will create a Power Virtual Agent chatbot instance, enable the integration between Power Virtual Agent and Dynamics 365 Omnichannel for Customer Service and configure the human agent escalation scenario in Power Virtual Agent.
- Exercise 2 - You will create and configure queues, workstream and chat widget data to route the conversations based on the conditions triggered by the Customer in D365 Commerce e-Commerce portal' chat widget and the chat bot in Power Virtual Agent.
- Exercise 3 - You will embed an Omnichannel Chat Widget into a D365 Commerce's e-commerce site page using e-Commerce Site builder so that the customer can view the chat widget page on the e-Commerce Site and chat with a bot or human agent.
- Later, in Exercise 4, you will play the role of a customer who will create an account and login into the D365 Commerce e-Commerce portal, place an order, interact with the Power Virtual Agent Bot, and escalate the conversation to a live human agent in Omnichannel for Customer service to cancel the recently placed order and inquire about conditions for product returns. In the same exercise, you will also play the role of a Customer Service agent who will login into D365 Omnichannel for Customer Service, accept the incoming human escalation chat request and perform the actions requested by the customer on the sales order.
- Exercise 5 and 6 are optional exercises. In Exercise 5, You will create and configure Agent Scripts which will help the Customer Service agent to validate customer information when a conversation is initiated between a customer and a human agent. In Exercise 6, you will create knowledge articles that can help a customer agent to address a customer's question about Return conditions during the Omnichannel Customer Service conversation.
- You can then repeat Exercise 4 so that as a customer service agent, you can validate the customer information using agent scripts, and guide the customer by viewing Customer's data and knowledge articles.

## Prerequisites

- D365 Commerce (Platform Update 48 (10.0.24) or higher)
- Commerce Chat package has been deployed in D365 Commerce.
- D365 Omnichannel for Customer Service
- Power Virtual Agents
- [Application Registration in an Azure Active Directory](#)

## Technologies Used

### Power Virtual Agent

Power Virtual Agents help you to quickly and easily create AI-powered solutions to some of your customer support challenges – no developers or data scientists required. Power Virtual Agents give you the ability to create powerful chatbots that can answer questions posed by your customers, other employees, or visitors to your website or service and route important conversations to human agents quickly.

These bots can be created easily without the need for data scientists or developers. Some of the common scenarios that Power Virtual Agents bots have been applied to include:

- COVID-19 infection rate and tracking information
- Sales help and support issues
- Opening hours and store information
- Employee health and vacation benefits
- Common employee questions for businesses

## **D365 Omnichannel for Customer Service Application**

Omnichannel for Customer Service is a robust application that extends the power of Dynamics 365 Customer Service to enable organizations to instantly connect and engage with their customers via channels such as Live Chat and SMS.

## **D365 Commerce E-commerce Site**

Dynamics 365 Commerce supports multiple channels. These channels include online stores, call centers, and retail stores (brick-and-mortar stores). Online stores give retailers **an online** presence, where the customer can interact with the brand and purchase products from the online store, in addition to the retailer's physical stores. When customers buy products online, these products can be shipped to **them**, or they can pick up the products in any of the brands' retail stores.

## **Commerce Chat with D365 Omnichannel for Customer Service**

Commerce Chat with Omnichannel for Customer Service enables eCommerce customers to chat with live agents in the contact centers. In order to enable chat with human agents, we use Omnichannel for Customer Service to manage chat channels, users (agents and supervisors), work streams, conversations, and queues, and effectively route important conversations to agents quickly. You can manage the capacity of agents, so they handle conversations effectively and assist your customers better. You can manage the types of conversations agents receive using work stream and queue configurations.

Proactive Chat notifications and chat can appear on eCommerce page based on different parameters like moving between specific pages, specific pages, specific product pages, time spent on a page, cart value, number of items etc.

We enable Retailers to instantly connect and engage with their customers via Chat channel when customer escalates a request or via pre-defined topic flow. We pass contextual customer identification from eCommerce to Omnichannel for Customer Service and enable agents to engage with customers. Agents can leverage out of box Omnichannel for Customer Service functionality like real time notifications, real time sentimental analysis, integrated communication, and agent productivity tools like KB integration, search and case creation effectively. Agents have instant access to Commerce Customer Information, Sales information and can act on behalf of their customers with deep linking ability to Commerce Call Center.

Supervisors get real-time and historical visibility and insights into the operational efficiency of agents and the utilization across various channels. The enterprise-grade routing and work distribution engine allows customers to configure agent presence, availability, and routing rules, thus ensuring agents are working on the most relevant engagements.

Engage with your customers in the way they want, by using chat, and monitor automatic conversations through the Power Virtual Agents. Service agents can help your customers to address customer queries, enable customer service and sales for commerce customers.

This feature enables retailers to

- Increase cart conversion to sales.
- Increase personalized engagement with their consumers and better retention.
- Increase customer service with integration of human agent and self-service Power Virtual Agents chatbots
- Increase agent experience with real-time customer profile, order, and purchasing data driving operational improvements and engagement.
- Increase overall customer satisfaction.

# Exercise 1: Extend PVA with Custom Scenarios

**Dynamics 365 Omnichannel** integration allows the customer to interact with **Power Virtual Agent** using the Dynamics 365 chat widget to access the knowledge and your custom scenarios. It also, allows the escalation of a bot conversation to a live agent to continue the interaction. When escalating a conversation, Dynamics passes along the conversation history and the context to the agent.

In this exercise, you will be doing the following:

1. Create a Chat bot.
2. Integrate PVA with Omnichannel for Customer Service Instance.
3. Configure hand-off to Omnichannel for Customer Service.
4. Create a Custom Scenario.

## Task 1: Create a Chat bot

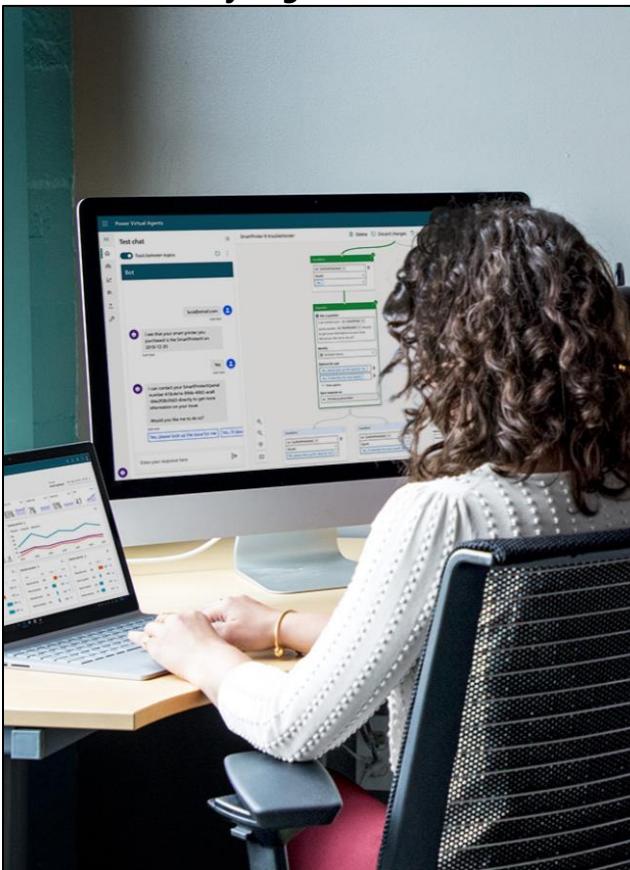
In this task, you will learn to create a new chat bot.

1. While in the In-Private or Incognito window, navigate to <https://web.powerva.microsoft.com>.

2. Sign-in with the credentials provided by your instructor.

**Note:** If you are in instructor led training. Use the credentials provided by your instructor in the training information document.

3. Select the **country/region** and click **Get Started**



Welcome to Power Virtual Agents

Choose your country/region

United States

I will receive information, tips, and offers about Power Virtual Agents.

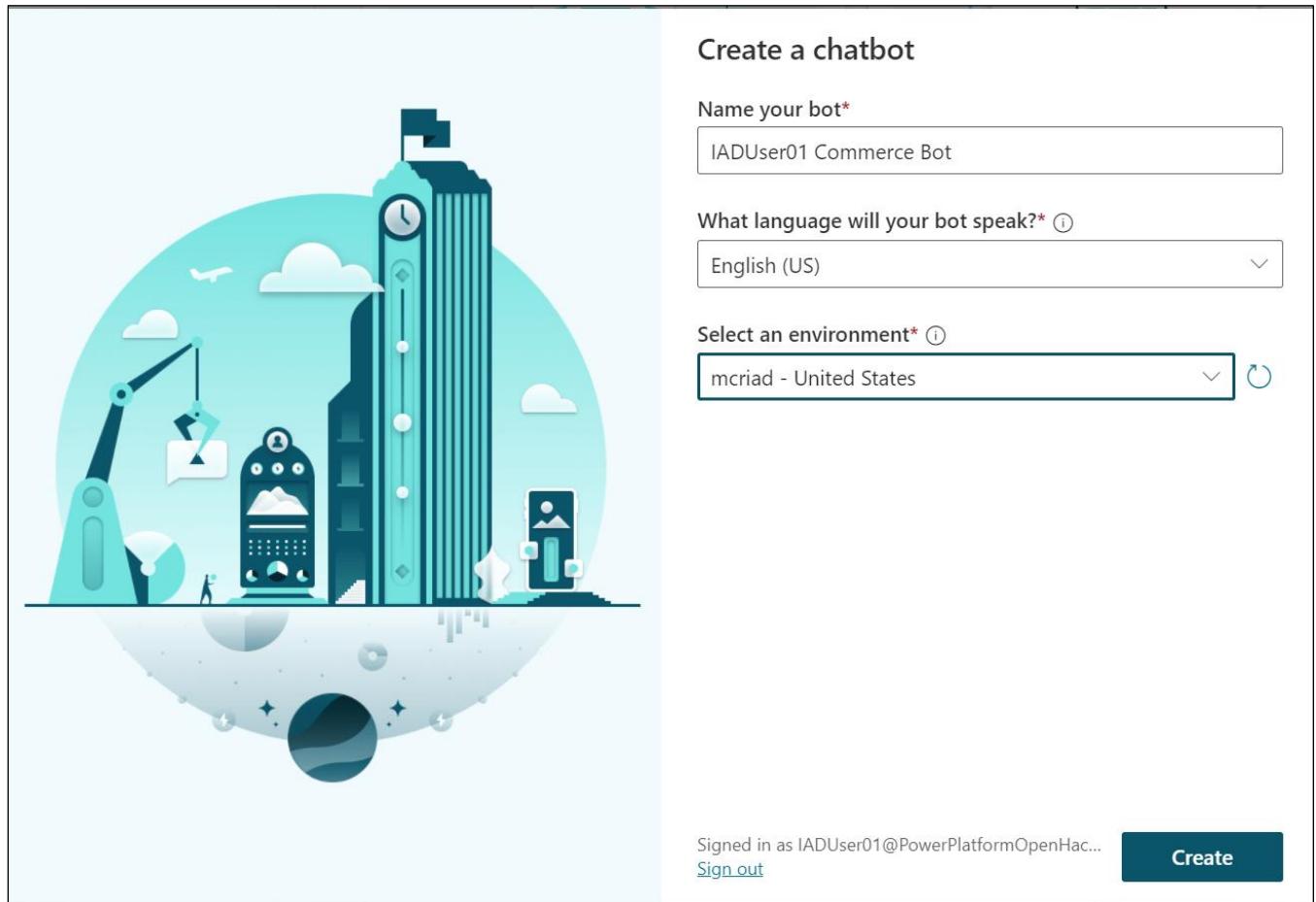
By clicking "Get Started", you agree to these [terms and conditions](#) and allow Power Virtual Agents to get your user and tenant details.

[Microsoft Privacy Statement](#)

**Get Started**

4. **Name your bot** anything you like (such as "IADUser01 Commerce Bot"). Select the **Language**, then select the bot environment.

*Note:* For the instructor led labs conducted by Microsoft team, select "**mcriad**" from the Environment drop down list.



5. Click **Create**.

*Note:* Once you click Create, the process of creating the first bot within a new environment can take up to 15 minutes. Subsequent bots will be created much faster. After you create your bot, it appears in the list

under the robot icon  on the navigation bar.

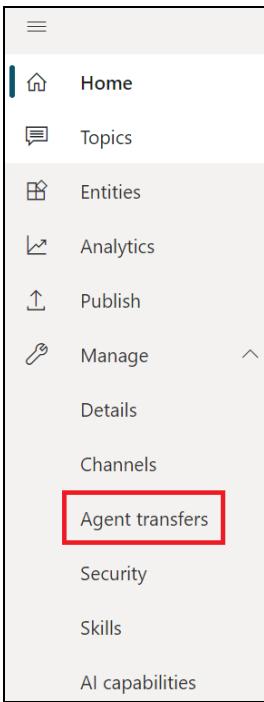
*Pro Tip:* If you've created a bot in this environment before, to create another bot select the robot icon  on the navigation bar, and then select New bot.

**Congratulations!** You have created a new bot.

## Task 2: Integrate PVA and Omnichannel for Customer Service

In this task, you will learn the steps to integrate PVA and D365 Omnichannel for Customer Service.

1. On the left pane, expand **Manage** and click on **Agent transfers**.



2. Select the **Omnichannel** tile.

### Agent transfers

Connect to a customer engagement app to enable your bot to hand off a chat session to a live agent or other bot. [Learn more](#)

How would you like the bot to hand off chat sessions?



Omnichannel



A custom engagement hub

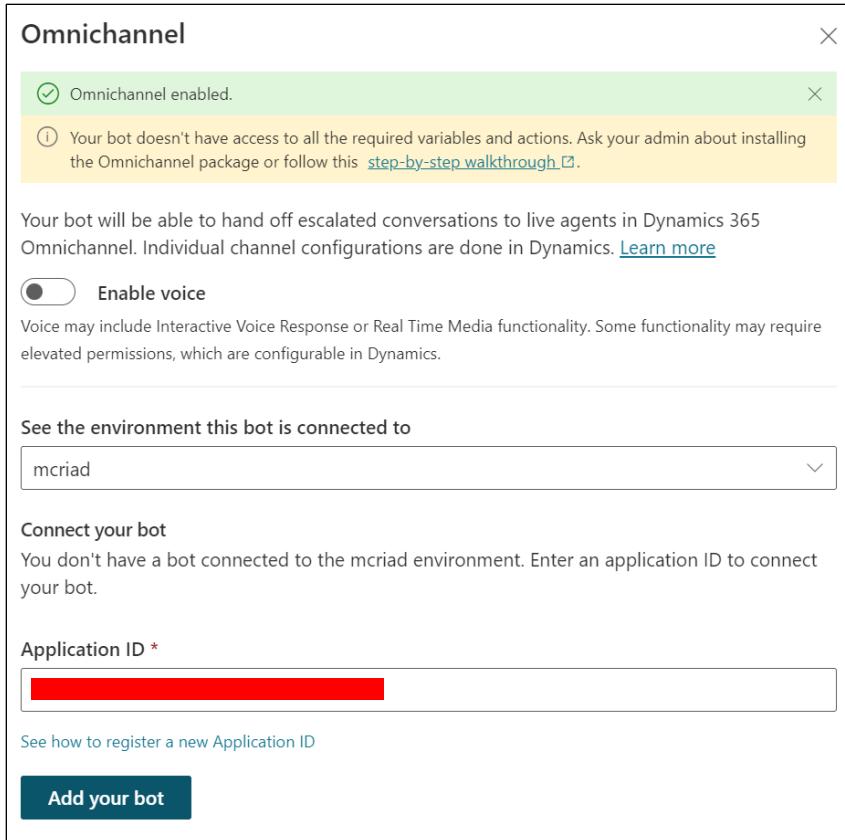
3. Select **Enable**.

**Enable**

**Cancel**

4. Provide the application ID of the Application registration **provided by your instructor** on the field **Application ID** and select **Add your bot** button. This will allow the bot to hand off the escalated conversations to human agents in D365 Omnichannel for customer service. This will also create a **Bot user** in D365 Omnichannel for customer service which can be assigned to the bot queue in the later exercise.

*Note:* If you are in instructor led training. Use the Application ID provided by your instructor in the training information document.



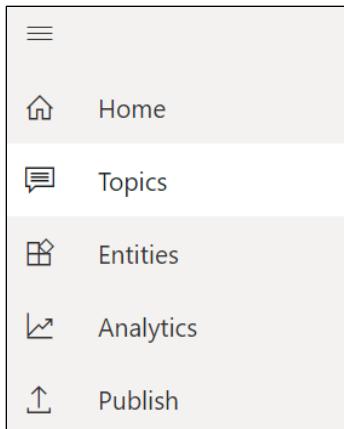
5. Close the Omnichannel form by selecting **X** on the top right edge of the form.

**Congratulations!** You have successfully enabled the integration between Power Virtual Agent and D365 Omnichannel for Customer Service.

### Task 3: Configure hand-off scenario

In this task, you will learn the steps to configure a hand-off scenario with D365 Omnichannel for Customer Service.

1. On the left pane, Select **Topics**.



2. Select **Escalate** from the list of topics.

## Topics ⓘ

Existing (12) Suggested (0)

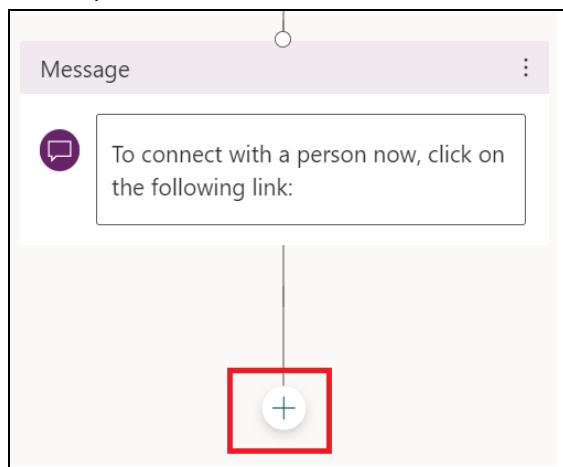
Type	Name	Trigger phrases	Status
💬	Lesson 1 - A simple topic	(4) When are you closed	<input checked="" type="checkbox"/> On
💬	Lesson 2 - A simple topic with a condition an...	(5) Are there any stores arou...	<input checked="" type="checkbox"/> On
💬	Lesson 3 - A topic with a condition, variables...	(5) Buy items	<input checked="" type="checkbox"/> On
💬	Lesson 4 - A topic with a condition, variables...	(5) What is the best product f...	<input checked="" type="checkbox"/> On
⚙️	Greeting	(52) Good afternoon	Always on
⚙️	Escalate	(65) Talk to agent	Always on

### 3. Select **Go to authoring canvas**.

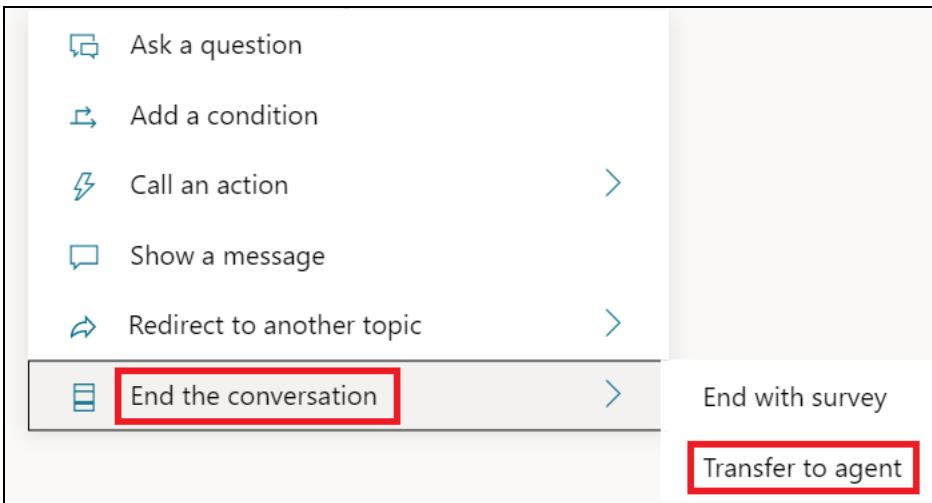
**Note:** This step is required only once per Dataverse environment. You can skip to next step if you do not see the "Go to authoring canvas" button.

The screenshot shows the 'Escalate' topic setup page. The 'Setup' tab is selected. On the left, there are fields for 'Name' (Escalate), 'Friendly name' (Escalate), and 'Description' (System Intent Escalate). In the center, under 'Trigger phrases (65)', it says 'For system topics, trigger phrases can't be edited.' Below this are four options: 'Talk to agent', 'Talk to a person', 'Talk to someone', and 'Call back'. On the right, there are fields for 'Modified by' (01/15/2019) and 'Status' (empty). At the top right, there are 'Save topic' and 'Delete' buttons. A red box highlights the 'Go to authoring canvas' button at the bottom right of the central area.

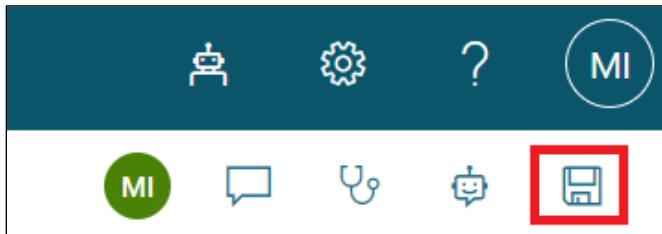
### 4. Select plus(+) icon to add a new node.



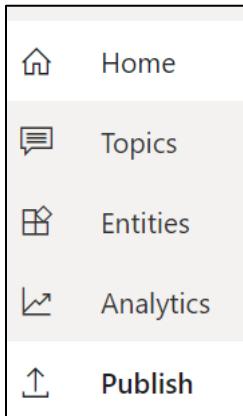
### 5. Select **End the conversation** and then select **Transfer to agent**.



6. Click on Save (  ) icon on the top right edge of the screen to save the changes on the topic.



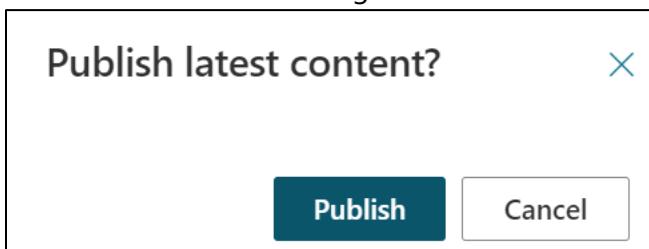
7. Once the changes have been saved, Select **Publish** on the left pane.



8. Select **Publish** button



9. Select **Publish** on the dialog form.



**Congratulations!** You have successfully configured an escalation to human agent scenario.

## Exercise 2: Configure Omnichannel Live Chat

In this exercise, you will be configuring live chat for **Dynamics 365 Omnichannel for Customer Service**. Omnichannel for Customer Service offers a suite of capabilities that extend the power of Dynamics 365 Customer Service Enterprise to enable organizations to instantly connect and engage with their customers across digital messaging channels.

In the following tasks, you will complete the following:

1. Assign Omnichannel agent security role
2. Configure Queues for Bot and Agent Users
3. Configure a Context Variable and Routing rule to route the message either to a Bot or Agent.

### Task 1: Assign Omnichannel Agent Security Role

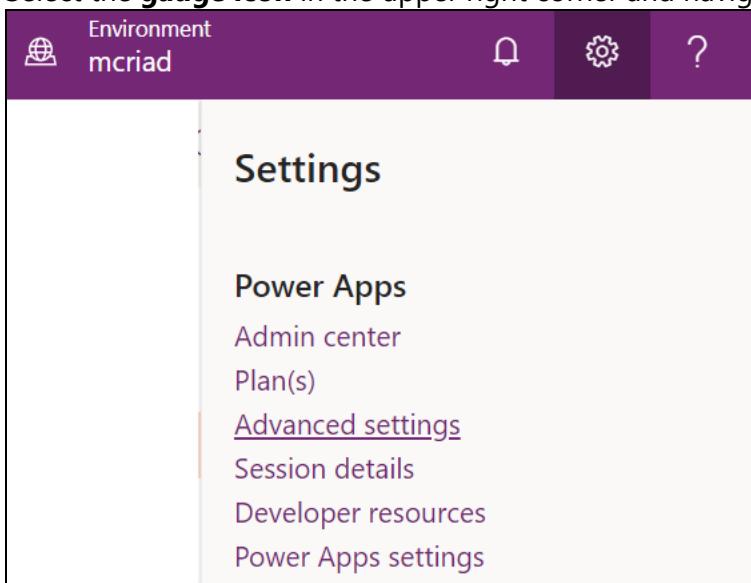
In this task, you will learn to assign an omnichannel agent security role to a human agent.

1. While in the In-Private or Incognito window, navigate to <https://make.powerapps.com>.
2. Ensure the correct environment from the upper right **Environment** drop down is selected.

*Note: For the instructor led labs conducted by Microsoft team, select "mcriad" from the Environment drop down list because for this feature to work, it has to be a dataverse environment which is connected to F&O environment and this is the only dataverse environment which is connected to F&O environment.*



3. Select the **gauge icon** in the upper right corner and navigate to **Advanced Settings**.



4. A new window should open and navigate to Dynamics 365. It will land you in the Business Management section of Dynamics 365.

*Note: It may take a while to load. If it's been longer than a minute, stop and reload the page. It should then load faster.*

Dynamics 365 Settings Business Management SANDBOX

**Business Management**

Which feature would you like to work with?

 <b>Fiscal Year Settings</b> Set the start date, template, and display options for the fiscal year and fiscal period used for tracking sales goals.	 <b>Goal Metrics</b> Define and manage the kinds of goals that your organization tracks.
 <b>Business Closures</b> Create a list of holidays and other times when the business is closed.	 <b>Facilities/Equipment</b> Add facilities and equipment for service scheduling. Change information about resources or delete existing resources.
 <b>Queues</b> Create and manage service queues, and manage the membership of private queues. Establish criteria for automatic record creation and updates.	 <b>Resource Groups</b> Add new groups and new members to existing groups for service scheduling. Update group information and delete groups or group members.
 <b>Sales Territories</b> Create new sales territories and assign territory managers. Add and remove members, modify territory information, and delete territories.	 <b>Services</b> Add new services for service scheduling. Change service information and deactivate existing services.
 <b>Sites</b> Create new sites or office locations where service operations take place. Add and remove resources, change site information, or delete sites.	 <b>Subjects</b> Manage the subject hierarchy for your organization's products, literature, and articles.
 <b>Currencies</b> Add new currencies or change the exchange rates for existing currencies.	 <b>Connection Roles</b> Create, edit, and delete the standard labels used to define connections between records.
 <b>Automatic Record Creation and Update Rules</b> Create and manage rules for automatic record creation and updates. You can set up rules for either out-of-the-box entities or custom entities.	 <b>Rollup Queries</b> Go to your list of Rollup Queries that you can use to gather data about a group of related records.
 <b>LinkedIn Sales Navigator</b> Manage settings relating to LinkedIn Sales Navigator Integration	

5. On the top command bar next to Dynamics 365, select **Settings** to open the drop-down, then select **Security** in the third column under System.

Dynamics 365 Settings Business Management

**Settings**

<b>Business</b>	<b>Customization</b>	<b>System</b>
 Business Manageme...	 Customizations	 Administration
 Templates	 Solutions	 Security
 Product Catalog	 Microsoft AppSource	 Data Management
 Service Management	 Plug-In Trace Log	 System Jobs
 Sync Error	 Solutions History	 Document Manage...
		 Auditing

6. Under Security, select **Users**.

**Security**

Which feature would you like to work with?

 <b>Users</b> Add new users. Edit information about users and deactivate user records. Manage the teams, roles, and licenses assigned to users.
---

7. Switch the view drop down from Omnichannel Users to **Enabled Users** for the grid view so that your user will show in the list.

The screenshot shows a dropdown menu titled "Omnichannel Users". Under the heading "System Views", there is a list of user categories. The "Enabled Users" option is highlighted with a light blue background, indicating it is selected. Other options include: @Me, Access Mode Interactive Users, Administrative Access Users, Administrators, Agents, All, Application Users, Associated Record Team Members, Bot agents, Bot Users, By Me, Disabled Users, Disabled users consuming licenses, Enabled Users (which is the current selection), and Full Access Users.

8. While in the Enabled User list, scroll to **find your user** or use the **Search bar**.

*Note: If you are in an official training, search for you assigned user – IAD User [x]*

The screenshot shows a search results grid. At the top, there is a search bar containing the text "jad". Below the search bar is a header row with columns: "Full Name ↑", "Position", "Main Phone", "Business Unit", "Site", "Title", and "Primary Email". The main body of the grid contains one row for "IAD User 01", which includes the full name "IAD User 01", the email address "unq0ed694338a62465...", and the site "IADUser01@PowerPlatformOp...".

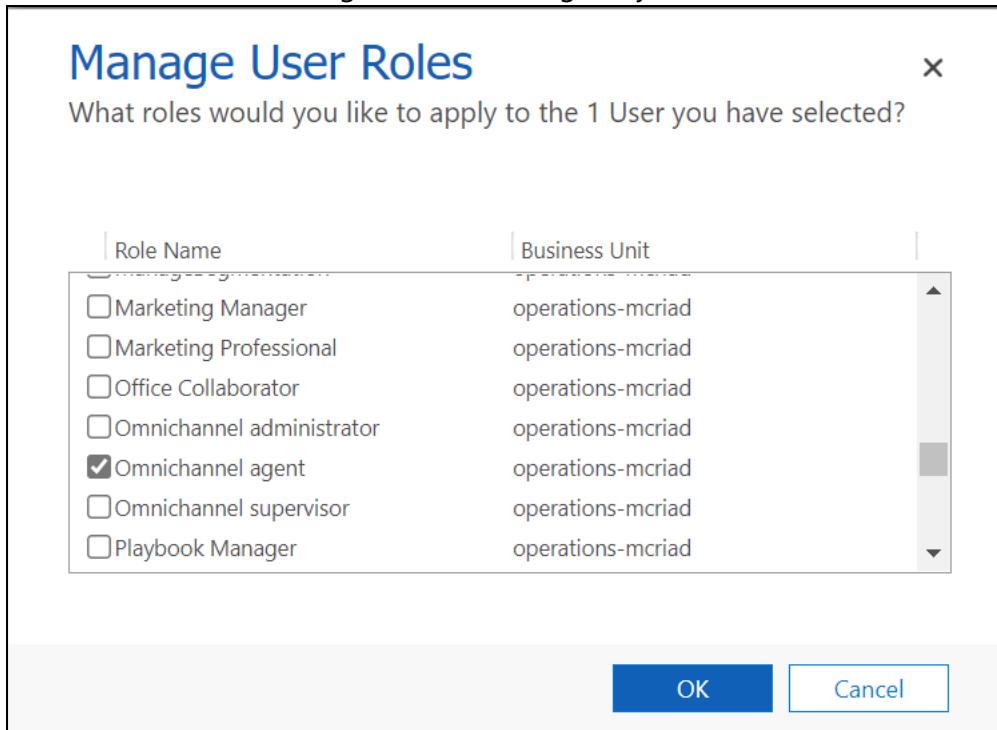
9. Select your user for the training and select **Manage Roles** on the top command bar.

The screenshot shows the Dynamics 365 top command bar. The "MANAGE ROLES" button is highlighted with a light blue background, indicating it is selected. Other buttons visible include: NEW, EDIT, APPROVE EMAIL, REJECT EMAIL, PROMOTE TO ADMIN, CHANGE BUSINESS UNIT, and SECURITY. The "Dynamics 365" logo is also present.

The screenshot shows a search results grid. At the top, there is a search bar containing the text "jad". Below the search bar is a header row with columns: "Full Name ↑", "Position", "Main Phone", "Business Unit", and "Site". The main body of the grid contains one row for "IAD User 01", which includes the full name "IAD User 01", the email address "unq0ed694338a62465...", and the site "IADUser01@PowerPlatformOp...". The checkbox next to the user's name is checked, indicating they are selected.

10. Select the Omnichannel Agent roles to assign to your user and select **OK**.

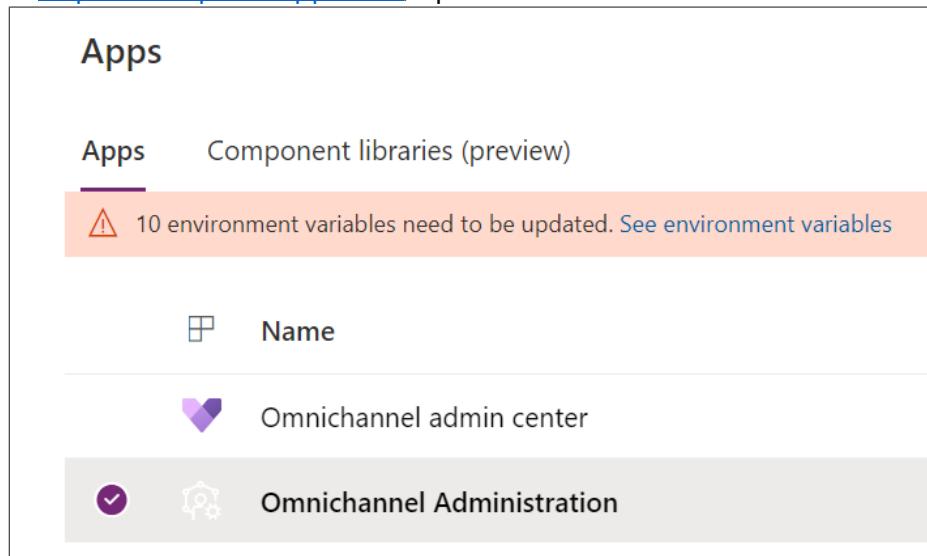


**Congratulations!** You assigned the proper omnichannel agent role to your user to allow you to be a live agent in omnichannel.

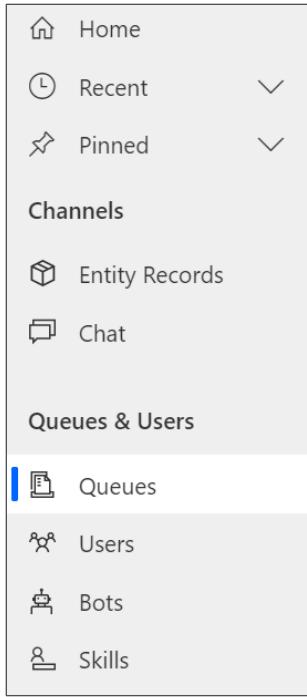
## Task 2: Create and Configure Omnichannel Queues

In this task, you will create and configure the omnichannel queues necessary to communicate with the correct bot or agent depending on the situation.

1. In <http://make.powerapps.com>, open the **Omnichannel Administration** app.



2. Select **Queues** on the left navigation bar.



3. Click **+ New** to create a new Queue.

Omnichannel queues ▾	
✓   Name ↑ ▾	Queue type ▾
Default entity queue	Entity
Default messaging queue	Messaging

4. Give the new Queue the following details:

- a. **Name:** <<UserName>>"Bot Queue"
- b. **Priority:** 1 (lower than human agent queue)
- c. Click **Save**.

Save Save & Close New Delete

Omnichannel configuration changes take up to 15 minutes to reflect.

### IADUser01 Bot Queue - Saved

Queue

**Summary** Related

#### SUMMARY

Name	*	IADUser01 Bot Queue
Priority	*	1
Queue type	*	Messaging
Owner	*	IAD User 01

(i) By using this feature, you acknowledge that this feature is in preview and you agree to the [Preview Terms](#). [Learn more](#)

5. You will notice that your **user is automatically added** to the Users list in the queue. So, remove the user by selecting your user and selecting the remove button. We will then associate the IADUser01 Bot Queue with the Bot User so it will respond to incoming messages from customers without agent (human) intervention.

Select **Add Existing User** on the **User (Agents)** subgrid to add the Bot user you previously created.

IADUser01 Bot Queue - Saved

Queue

**Summary** Related

#### SUMMARY

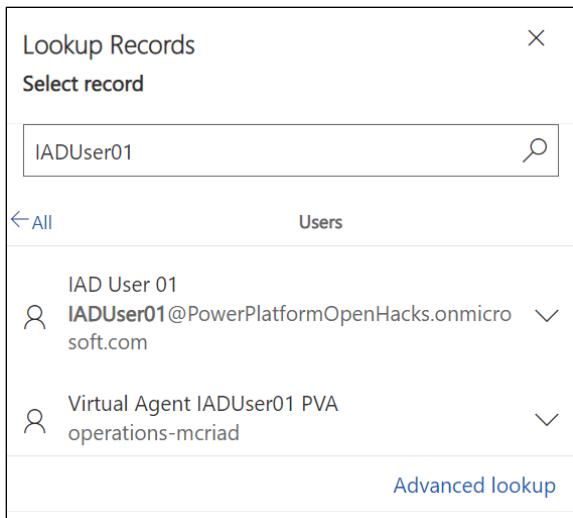
Name	*	IADUser01 Bot Queue
Priority	*	1
Queue type	*	Messaging
Owner	*	IAD User 01

(i) By using this feature, you acknowledge that this feature is in preview and you agree to the [Preview Terms](#). [Learn more](#)

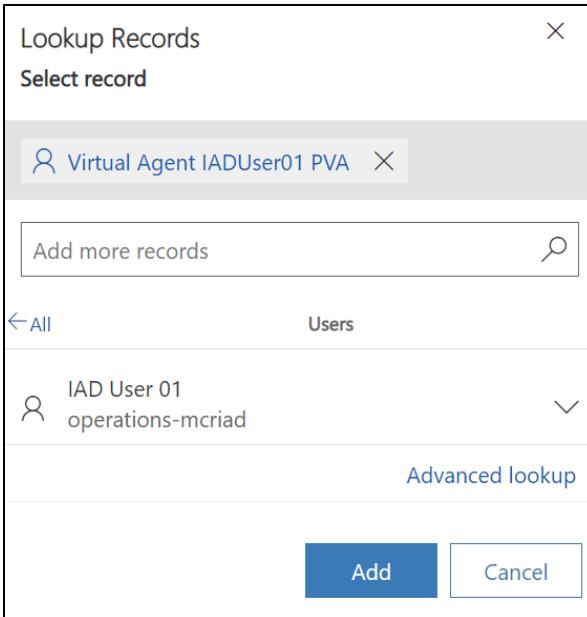
#### Users (Agents)

Full Name	Capacity	Business Unit
No data available.		

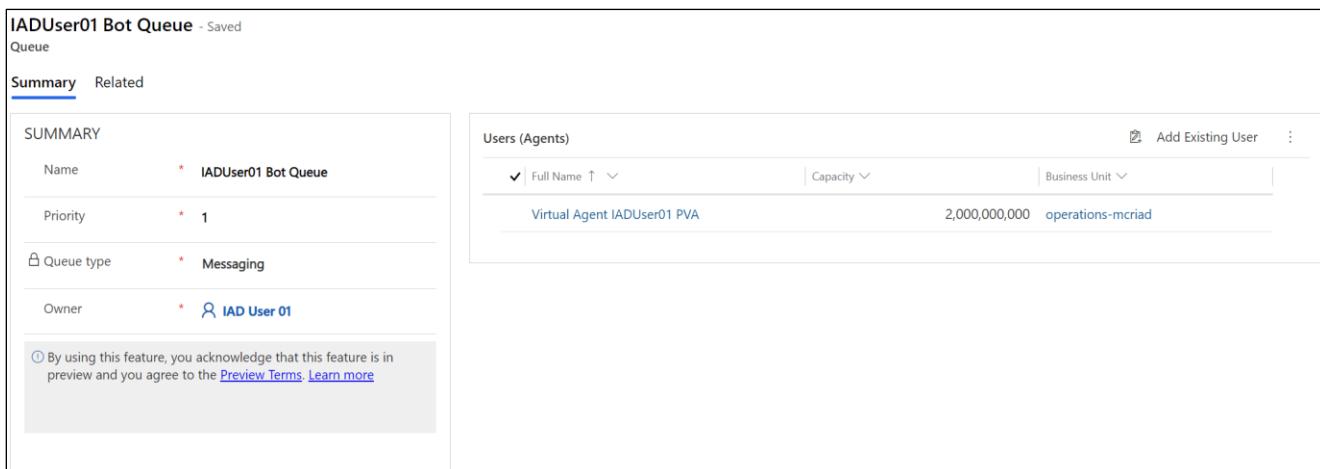
6. In the Lookup Records pane, search for your **Bot User** (Virtual Agent <<UserName>> PVA Bot). This bot user was automatically created when you have configured Omnichannel agent transfer in Power Virtual Agent as part of Exercise 1>Task 2>Step 4.



7. Select the record from the list and click **Add**.



8. You should now see the Bot User (Virtual Agent IADUser01 PVA) in the Users (Agents) list. **Save & Close**.



9. Go back to the **Omnichannel queues** grid. Click **+ New** to create a new Queue.

<input type="button" value="←"/>	<input checked="" type="checkbox"/> Show Chart	<input type="button" value="New"/>	<input type="button" value="Delete"/>	<input type="button" value="Refresh"/>	<input type="button" value="Email a Link"/>	<input type="button" value="Flow"/>
<b>Omnichannel queues</b> ▾						
✓   Name ↑ ▾				Queue type ▾		
Default entity queue				Entity		
Default messaging queue				Messaging		

10. Give the new Queue the following details:

- a. **Name:** <<UserName>> "Escalate To Human"
- b. **Priority:** 2 (lower than default queue)
- c. Click **Save**.

IADUser01 Escalate To Human - Saved

Queue

**Summary**   **Related**

**SUMMARY**

Name	* IADUser01 Escalate To Human
Priority	* 2
Queue type	* Messaging
Owner	* IAD User 01

By using this feature, you acknowledge that this feature is in preview and you agree to the [Preview Terms](#). [Learn more](#)

11. A Users (Agents) **subgrid should appear** on the right and your **user should be automatically added** to the list. If your user account is not on the list, add it through the Add Existing User button now.

The queue <<UserName>> **Escalate To Human** is created to manage and redirect the incoming messages from a user to a Customer Service (human) Agent when Bot sends the user through to a live agent.

IADUser01 Escalate To Human - Saved

Queue

[Summary](#) [Related](#)

SUMMARY	
Name	* IADUser01 Escalate To Human
Priority	* 2
Queue type	* Messaging
Owner	* <a href="#">IAD User 01</a>

By using this feature, you acknowledge that this feature is in preview and you agree to the [Preview Terms](#). [Learn more](#)

Users (Agents)

Full Name ↑	Capacity ↓	Business Unit ↓
IAD User 01	100	operations-mcriad

[Add Existing User](#) [:](#)

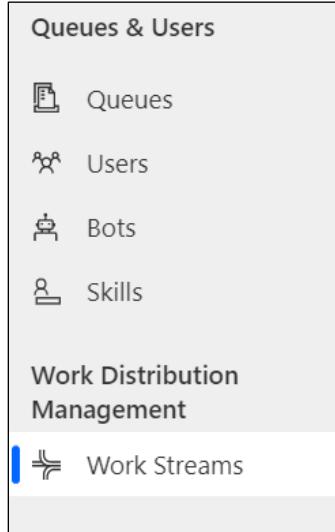
**Congratulations!** You have created the necessary queue to escalate to human agent and added the appropriate users to each messaging queue.

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

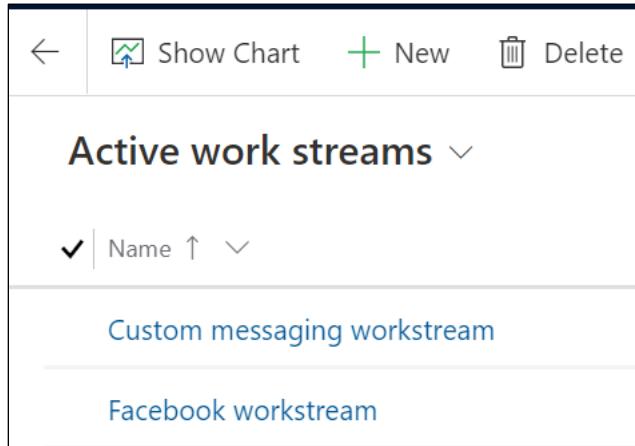
In this task, we will set up basic chat routing. This will allow for users to chat with a bot user in certain cases and a live human agent in other scenarios. The routing rules will allow chat to behave as follows:

- **Route to Bot:** Initial customer conversation is through PVA Bot in the default messaging queue. When the chat bot is first opened, route to Bot queue which only contains the bot user (agent).
- **Human Routing Rule:** When data in context variable **va\_Scope** is present, we route to the queue that has only human users (agents) who can take over conversation.

1. Navigate to **Work Streams**.



2. Select **+ New** to create a new workstream.



3. Enter the following details in the below workstream:

- a. **Name:** <<UserName>> "Chat Workstream"
- b. **Channel:** Live chat
- c. **Capacity format:** Unit based
- d. **Capacity:** 30
- e. **Auto-close after inactivity:** 5 minutes
- f. Click **Save**.

IADUser01 Chat Workstream - Saved

Work Stream

**Work Distribution** Context Variables Skill Attachment Rules

General information

Name	* IADUser01 Chat Workstream
Channel	* Live chat
Capacity format	Unit based
Capacity	* 30
Auto-close after inactivity	* 5 minutes

- In the your **chat workstream** record, select the **Context Variables** tab. Select **+ New**.

IADUser01 Chat Workstream - Saved

Work Stream

**Push**  
Work Distribution Mode

**Live chat**  
Channel

Work Distribution Context Variables Skill Attachment Rules Routing Rules Templates Smart assist Quick Replies

Context variable

Display Name	Name	Type

+ New ⌂ Refresh

- Create the new Context Variable with the following details:

- Display Name:** va\_Scope
- Name:** va\_Scope
- Type:** Text

Quick Create: Context variable

Display Name	va_Scope
Name	* va_Scope
Owner	* IAD User 01
Type	* Text

- Click **Save and Close**.
- In the your **chat workstream** record, select the **Context Variables** tab. Select **+ New**.

IADUser01 Chat Workstream - Saved  
Work Stream

Push  
Work Distribution Mode | Live chat  
Channel

Work Distribution    Context Variables    Skill Attachment Rules    Routing Rules    Templates    Smart assist    Quick Replies

Context variable

+ New    Refresh

Display Name: Email    Name ↑    Type: Text

8. Create the new Context Variable with the following details:

- Display Name:** Email
- Name:** Email
- Type:** Text

Quick Create: Context variable

Display Name	Email
Name	* Email
Owner	*  IAD User 01
Type	* Text

9. Click **Save and Close**.

10. In the your **chat workstream** record, select the **Context Variables** tab. Select **+ New**.

IADUser01 Chat Workstream - Saved  
Work Stream

Push  
Work Distribution Mode | Live chat  
Channel

Work Distribution    Context Variables    Skill Attachment Rules    Routing Rules    Templates    Smart assist    Quick Replies

Context variable

+ New    Refresh

Display Name: Email    Name ↑    Type: Text

11. Create the new Context Variable with the following details:

- Display Name:** Customer Account Number
- Name:** msdyn\_CustomerId
- Type:** Text

Quick Create: Context variable

Display Name	Customer Account Number
Name	* msdyn_CustomerId
Owner	*  IAD User 01
Type	* Text

12. Click **Save and Close**.

13. In the your **chat workstream** record, select the **Context Variables** tab. Select **+ New**.

IADUser01 Chat Workstream - Saved  
Work Stream

Push  
Work Distribution Mode | Live chat  
Channel

Work Distribution Context Variables Skill Attachment Rules Routing Rules Templates Smart assist Quick Replies

Context variable

+ New Refresh

Display Name Name Type

14. Create the new Context Variable with the following details:

- Display Name:** Customer Name
- Name:** msdyn\_CustomerName
- Type:** Text

Quick Create: Context variable

Display Name Customer Name

Name \* msdyn\_CustomerName

Owner \* IAD User 01

Type \* Text

15. Click **Save and Close**.

16. You should now see the four new Context Variable in your chat workstream.

Work Distribution Context Variables Skill Attachment Rules Routing Rules Templates Smart assist Quick Replies

Context variable

+ New Refresh Flow Run Report

Email	Email	Text
Customer Account Number	msdyn_CustomerId	Text
Customer Name	msdyn_CustomerName	Text
va_Scope	vaScope	Text

17. Select the **Routing Rules** tab. Click **+ Add** to create a new routing rule.

IADUser01 Chat Workstream - Saved  
Work Stream

Push  
Work Distribution Mode | Live chat  
Channel

Work Distribution Context Variables Skill Attachment Rules Routing Rules Templates Smart assist Quick Replies

Rule items

+ Add Flow

Name Description Modified On

18. Create the new Health Bot routing rule with the following details:

- Name:** Bot Routing Rule
- Queue:** <<UserName>> Bot Queue
- Add Condition:** Context Variable "va\_Scope = Does Not Contain Data"

Bot Routing Rule - Saved  
Rule Item

**General** Related

**General Information**

Name	* Bot Routing Rule
Owner	* IAD User 01
Work stream	* IADUser01 Chat Workstre...
Queue	* IADUser01 Bot Queue
Description	---

**Condition**

AND    OR    Ungroup    Delete    Reset

Context variable va\_Scope Does Not Contain Data

+ Condition

19. Select **Save & Close**. On your chat workstream, click + **Add** to add another new Routing Rule.

20. Create the new Omnichannel Agent routing rule with the following details:

- Name:** Human Agent
- Queue:** <<UserName>> Escalate To Human Agent
- Add Condition:** Context Variable "va\_Scope = Contains Data"

Human Agent - Saved  
Rule Item

**General** Related

**General Information**

Name	* Human Agent
Owner	* IAD User 01
Work stream	* IADUser01 Chat Workstre...
Queue	* IADUser01 Escalate To Hu...
Description	---

**Condition**

AND    OR    Ungroup    Delete    Reset

Context variable va\_Scope Contains Data

+ Condition

Condition

AND    OR    Ungroup    Delete    Reset

Context variable    va\_Scope    Contains Data

+ Condition

21. Select **Save & Close**.

22. On the Live chat workstream, you should now see the two **Routing Rules** we created for **Bot** (Bot Routing Rule) and **Agent** (Human Agent).

IADUser01 Chat Workstream - Saved  
Work Stream

Push  
Work Distribution Mode

Live  
Chan

Work Distribution    Context Variables    Skill Attachment Rules    **Routing Rules**    Templates    Smart assist    Quick Replies

Rule items

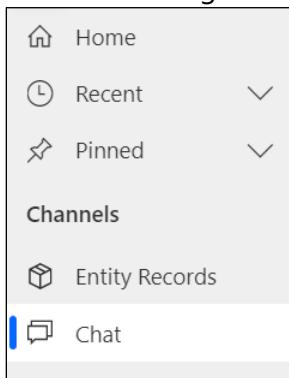
Name	Description	Modified On
Bot Routing Rule	---	1/26/2022 6:07 PM
Human Agent	---	1/26/2022 6:11 PM

**Congratulations!** You have created the proper context variable and routing rules that will allow customers to begin conversation with a PVA bot and escalate to a human agent.

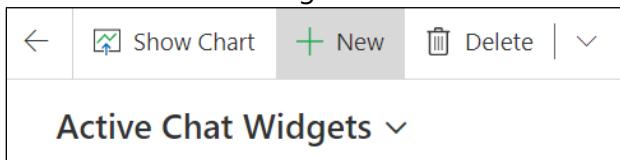
## Task 4: Create Chat Widget for Bot

In this task, you will learn the steps to create a new chat widget record.

1. In the Left Navigation Bar under **Channels** select **Chat**.



2. Select **+New Chat Widget**.

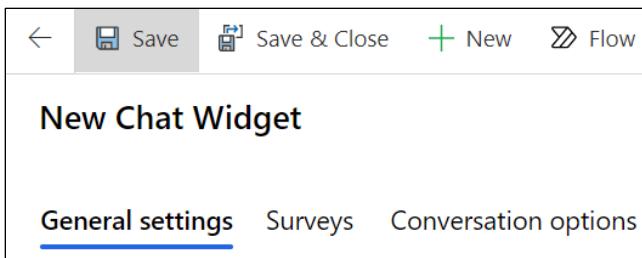


3. Give the Chat Widget a **Name** (eg., <<UserName>> Chat Widget) and set **Enable Proactive Chat** to **Yes**.

The screenshot shows the 'New Chat Widget' configuration page. The top navigation bar includes buttons for Save, Save & Close, New, Flow, and a dropdown menu. The main area is divided into several sections:

- General settings:** Includes fields for Name (IADUser01 Chat Widget), Language (English - United States), Agent display name (Full name), and Authentication settings (---).
- File attachments:** Options to enable file attachments for customers (No) and agents (No).
- Customer waiting:** Options to show position in queue (No) and show average wait time (No).
- Conversation Mode:** Set to Live Chat. A note states: "Live chat conversations happen in real time. When the chat ends, the session ends and the chat history is not maintained."
- Work distribution:** Set to Live chat workstream.
- Proactive chat:** Set to Yes.
- Chat Transcripts:** A note about data flow outside organizational boundaries, a link to the Microsoft Privacy Statement, and options to allow download or email of transcripts (both set to No).

4. Click **Save**.



5. After the record is saved, a **Widget Code Snippet** will be generated. **Copy** the code snippet and store it for later use.

The screenshot shows the 'General settings' tab of the 'IADUser01 Chat Widget' configuration page. The 'Code snippet' section contains the following JavaScript code:

```
<script id="Microsoft_Omnichannel_LCWid" src="https://oc-cdn-ocprod.azureedge.net/livechatwidget/scripts/LiveChatBootrapper.js" data-app-id="981f7bf9-0a52-4a72-9048-c269d8692c50" data-lcw-version="prod" data-org-id="e103e9eb-cebc-4840-912e-3c8cf4e60a9f" data-org-url="https://unqe103e9ebcebc4840912e3c8cf4e60-crm.omnichannelengagementhub.com"></script>
```

**Congratulations!** In this exercise, you have successfully configured Customer Service Omnichannel Live chat by creating the necessary Users, Queues, Work Streams, Context Variables, Routing Rules, and Chat Widget. These all work together and allow customers to chat with a virtual health bot with the option to escalate up to a human agent if needed.

## Exercise 3: Embed Chat Widget in E-commerce Site

In this exercise, you will learn to embed an **Omnichannel Chat Widget** into a D365 Commerce's e-commerce site page using e-Commerce Site builder. In your environment, we created a Fabrikam online site and now we will configure the chat widget to show it on the e-Commerce website.

**Site Builder:** It is an application used to customize and configure an e-commerce site in D365 Commerce.. In this walk-through, you will learn how to configure Chat widget in **D365 Commerce e-Commerce site**.

If you'd like to learn more about e-Commerce site, check out Microsoft Docs: [E-commerce site overview - Commerce | Dynamics 365 | Microsoft Docs](#)

## Task 1: Create a site page

In this task, you will learn the steps to duplicate a site page.

1. While in the In-Private or Incognito window, navigate to the site builder URL provided to you by your instructor.

**Note:** If you are in instructor led training. Use the D365 Commerce Site builder URL and credentials provided by your instructor in the training information document.

2. Click on the Site mentioned by the instructor.

The screenshot shows the Dynamics 365 Commerce Site builder interface. The top navigation bar has three dots and the text "Dynamics 365 Commerce". Below it is a header with a grid icon, "Sites", a "New site" button, and a "Rename" button. The main area is titled "Sites" and lists sites with columns for "Name". There are four entries: "default" (selected), "fabrikam", "MCIAD", and "Test" (disabled).

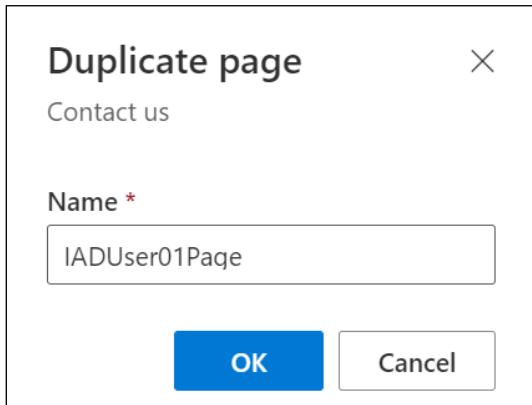
3. Select **Pages** on the left navigation bar.

The screenshot shows the Dynamics 365 Pages navigation bar. The top navigation bar has three dots and the text "Dynamics 365". Below it is a header with a grid icon, "Home", and a "Pages" icon. The left sidebar menu includes "Products", "Fragments", "Media library", "URLs", "Templates", "Layouts", "Design", and "Audiences". The "Pages" item is selected, indicated by a blue background and a checked checkbox icon.

4. Select **Contact us** page and click **Duplicate**.

The screenshot shows the Dynamics 365 Commerce interface. On the left, there's a navigation bar with Home, Pages (selected), Products, and Fragments. The main area is titled 'Pages' with a sub-count of '31 results'. A table lists pages with columns for 'Name' and 'Publish status'. One row is selected, showing 'Contact us' with a checkmark and 'Published · Pending changes'.

5. Provide a unique name for the page. For Ex: <<UserName>>Page and Select **OK** button.



6. If the Page has been successfully created then you should see your page in the grid.

The screenshot shows the Dynamics 365 Commerce Pages grid again. The 'Pages' count is now '32 results'. In the 'Name' column, the new page 'IADUser01Page' is visible.

7. Select **Publish** in the command bar to publish the page.

The screenshot shows the Dynamics 365 Commerce Pages list screen. The top navigation bar includes 'Dynamics 365 Commerce' and standard navigation icons. Below the navigation is a toolbar with 'New', 'Publish' (which is highlighted with a red box), 'Unpublish', and 'Delete'. The main area is titled 'Pages' with a note '(1) 36 results'. A table lists various pages with their names:

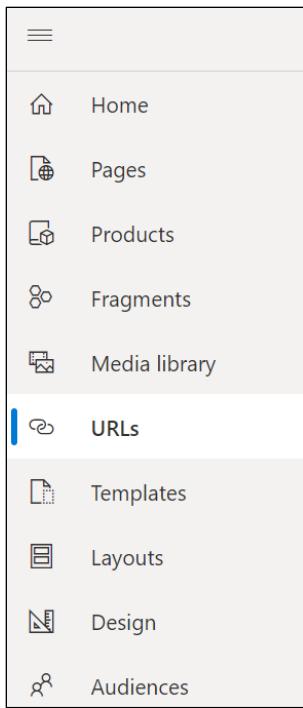
Name
MCR IAD USER02SECOND
MCR IAD 02 - Contact Us
MCR IAD USER02Page
Contact us
IADUser01Page
sanem
SocialProfileEdit

**Congratulations!** You have successfully created and published a new page.

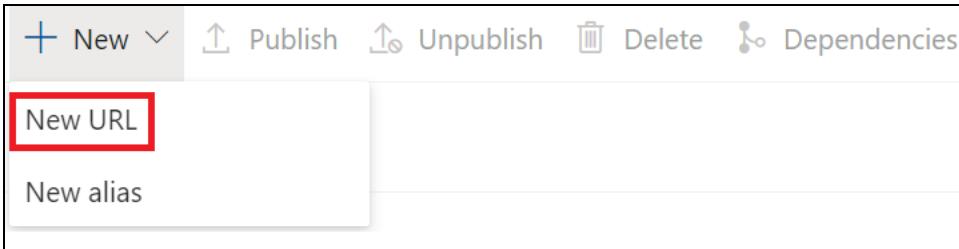
## Task 2: Create and Publish URL

In this task, you will learn the steps to create a new URL for the page created in the earlier task.

1. Select **URL** in the left pane.



2. Select **+New** and the **New URL** in the command bar.



3. Provide a unique name in the **URL path** field and select **Internal page** and then select **Next** button.  
*Note:* Remember the URL path name as it would be required in the later exercise to chat with PVA bot and human agent.

**Create new URL**

**URL path**

IADUserPage01

**URL preview**

www.contoso.com/IADUserPage01

**What are you creating a URL for?**

Internal page  
Direct URL link to a page within your site

Media library document  
Direct link to an document within your site

Internal URL redirect  
URL redirect to an another URL within your site

External page  
URL redirect to an another URL outside your site

**Next**

4. Search for the page created in Task 1(For Ex: IADUser01Page) and select your page then select **Create** button.

**Select a page**

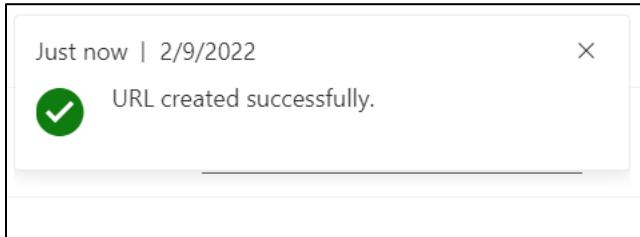
IADUser01Page X

Filters: Status: published X Clear all

Name ↓	
<input checked="" type="checkbox"/> IADUser01Page	IADUser01Page IDNMA1iE0  Description None  Tags None  Channel and locale variants Fabrikam extended online store · en-us

**Create** **Back**

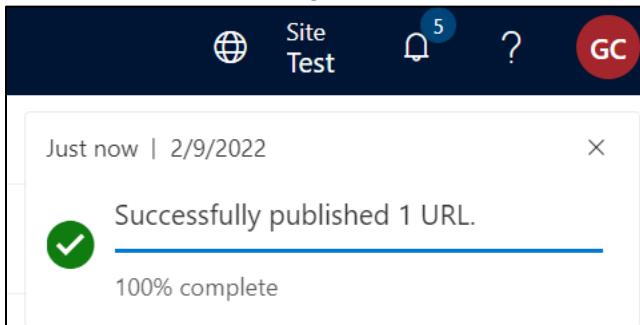
5. If the URL is successfully generated, you will see a notification on the top right edge of the browser with a successful message.



6. Select the newly created **URL** and then select **Publish** button on the command bar.

A screenshot of the Microsoft Power Platform Command Bar. The bar includes buttons for "New", "Publish" (which is highlighted with a red box), "Unpublish", "Delete", and "Dependencies". Below the bar, there is a section titled "URLs" with a sub-section "34 results". A table below lists one item: "Name" (./iaduserpage01), "Type" (URL), and "Publish status" (Draft). The row for this item has a blue checkmark icon to its left.

7. Once the URL is successfully published, you will see a notification on the top right edge of the browser with a successful message.

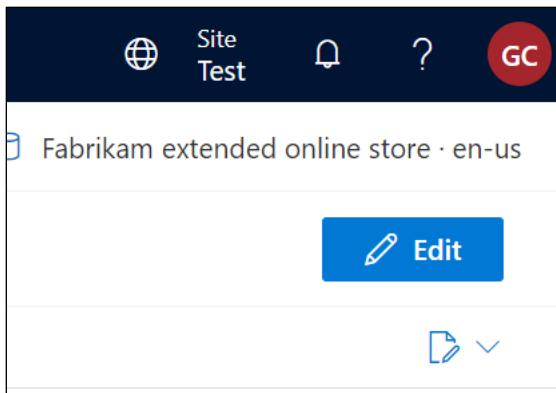


**Congratulations!** You have successfully created a URL and published it.

### Task 3: Embed a Chat Widget into an e-Commerce Site Page

In this task, you will learn the steps to embed a chat widget into an e-Commerce Site Page.

1. Open the new page created in Task 1.
2. Select **Edit** on the top right edge of the page.



3. Select **Sub footer slot** and then select + **Add module**.

IADUser01Page Draft

Target Default

Outline

IADUser01Page

- Default Page (Required)
  - Header slot
  - Sub header slot
  - Main slot
  - Sub footer slot** ...
  - Footer slot

+ Add module

Add fragment

4. Select **Container** module and then click on **OK**.

Select modules

Search

Module name ↑	Tags	Categories
Container		container
Container with 2 columns	container	container
Container with 3 columns	container	container

**Container**

Description

A container allows multiple modules to be hosted in it. Using the configuration properties various layouts can be achieved.

OK Cancel

5. Select the newly added container (**Container 3**) and then select + **Add module**.

IADUser01Page Draft

Target Default

Outline

IADUser01Page

- Default Page (Required)
  - Header slot
  - Sub header slot
  - Main slot
  - Sub footer slot
    - Container 3
  - Footer slot

Module actions

- Add module
- Add fragment
- Clone
- Delete
- Share as fragment

Targeting

- New target

The screenshot shows the 'IADUser01Page' in draft mode. The outline includes slots like Header, Sub header, Main, Sub footer, and Footer. A context menu is open over 'Container 3' in the Sub footer slot, listing actions: Add module, Add fragment, Clone, Delete, Share as fragment, Targeting, and New target.

6. Search for **chat** and select the module **Commerce Chat with Omnichannel for Customer Service** and then select **OK**.

Select modules

Chat

Module name ↑	Tags	Categories
Commerce Chat with Omnichannel for Customer Service	dynamics 365 custc	Customer Service chat connectors
Commerce Chat with Power Virtual Agents	power virtual agent	Customer Service chat Connectors

The screenshot shows a search results page for 'Chat'. A filter bar at the top has 'Chat' selected. The results table has columns for 'Module name', 'Tags', and 'Categories'. One result is selected: 'Commerce Chat with Omnichannel for Customer Service' (with a checked checkbox), which is categorized under 'Customer Service chat connectors' and has tags 'dynamics 365' and 'custc'. Another result, 'Commerce Chat with Power Virtual Agents', is also listed with its own set of tags.

7. Update the listed properties for the Commerce Chat module from the Widget Code Snippet copied in the last step of the earlier exercise [Exercise 2>Task 4>Step5]. Please follow the steps based on the Properties illustration below

- a. **Script source** : Copy the value in the tag src
- b. **Data application id** : Copy the value in the tag data-app-id
- c. **Data organization id** : Copy the value in the tag data-org-id
- d. **Data organization URL** : Copy the value in the tag data-org-url
- e. **Proactive Chat>Enabled** : Set the value to be enabled

**Properties**

### Commerce Chat with Omnichannel for Customer Service

Commerce Chat with Omnichannel for Customer Service

**Canvas properties**

**Script source \***

**Data application id \***

**Data organization id \***

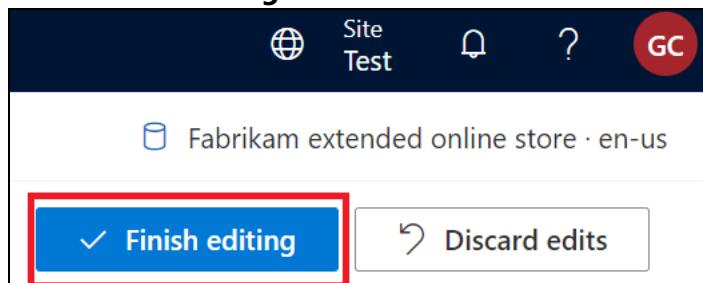
**Data organization URL \***

**Code snippet**

Widget snippet

```
<script
id="Microsoft_Omnichannel_LCWid
get" src="https://oc-cdn-
ocprod.azureedge.net/livechatwidg
et/scripts/LiveChatBootstrapper.js"
data-app-id="981f7b9f-0a52-4a72-
9048-c269d8692c50" data-lcw-
version="prod" data-org-
id="e103e9eb-cebc-4840-912e-
3c8cf4e60a9f" data-org-
url="https://unqe103e9ebcebc4840
912e3c8cf4e60-
crm.omnichannelengagementhub.c
om"></script>
```

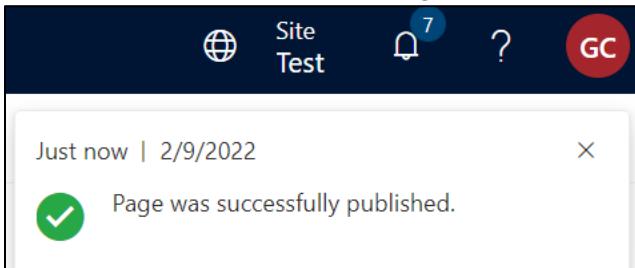
8. Select **Finish editing**.



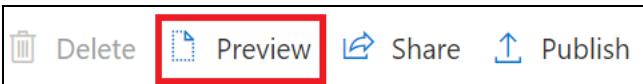
9. Select **Publish**.



10. If the page has been successfully published, you will see a notification on the top right edge of the browser with a successful message.

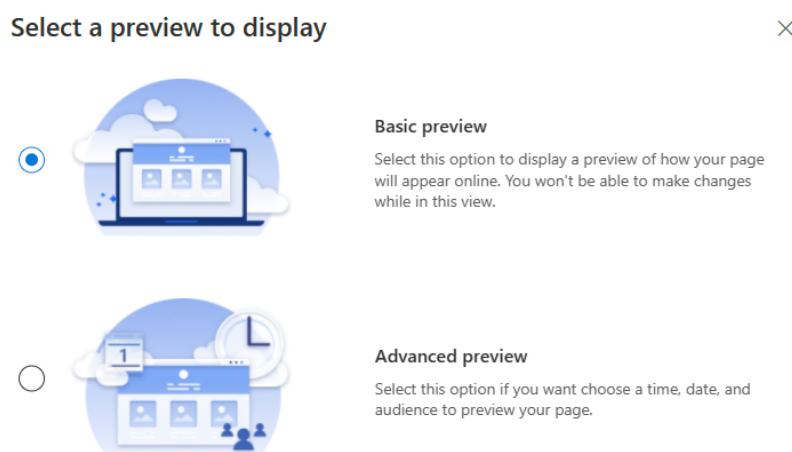


11. Select **Preview**.



12. Click on Basic Preview.

Click on Basic Preview



13. Verify if the **Chat** icon is visible in the bottom left corner of the preview page.

Buy 2 or more shoes and get 25% off! [Shop now](#)

# Fabrikam

Menswear ▾ Accessories ▾ Womenswear ▾ Explore Fabrikam ▾

## Contact

**Questions about Fabrikam products**

Call us: 1-83F-ABR-IKAM(1-833-227-4526)  
24 hours, 7 days a week  
Email us: Help@Fabrikam.com

**Questions about your order**

Call us: 1-83F-ABR-IKAM(1-833-227-4526)  
9:00 am-9:00 pm, 7 days a week  
Email us: Help@Fabrikam.com

**Feedback and suggestions**

Call us: 1-83F-ABR-IKAM(1-833-227-4526)  
9:00 am-9:00 pm, 7 days a week  
Email us: Feedback@Fabrikam.com

Send us a letter:  
Customer Care center  
1 Fabrikam Ave  
Redmond, WA 98052  
USA

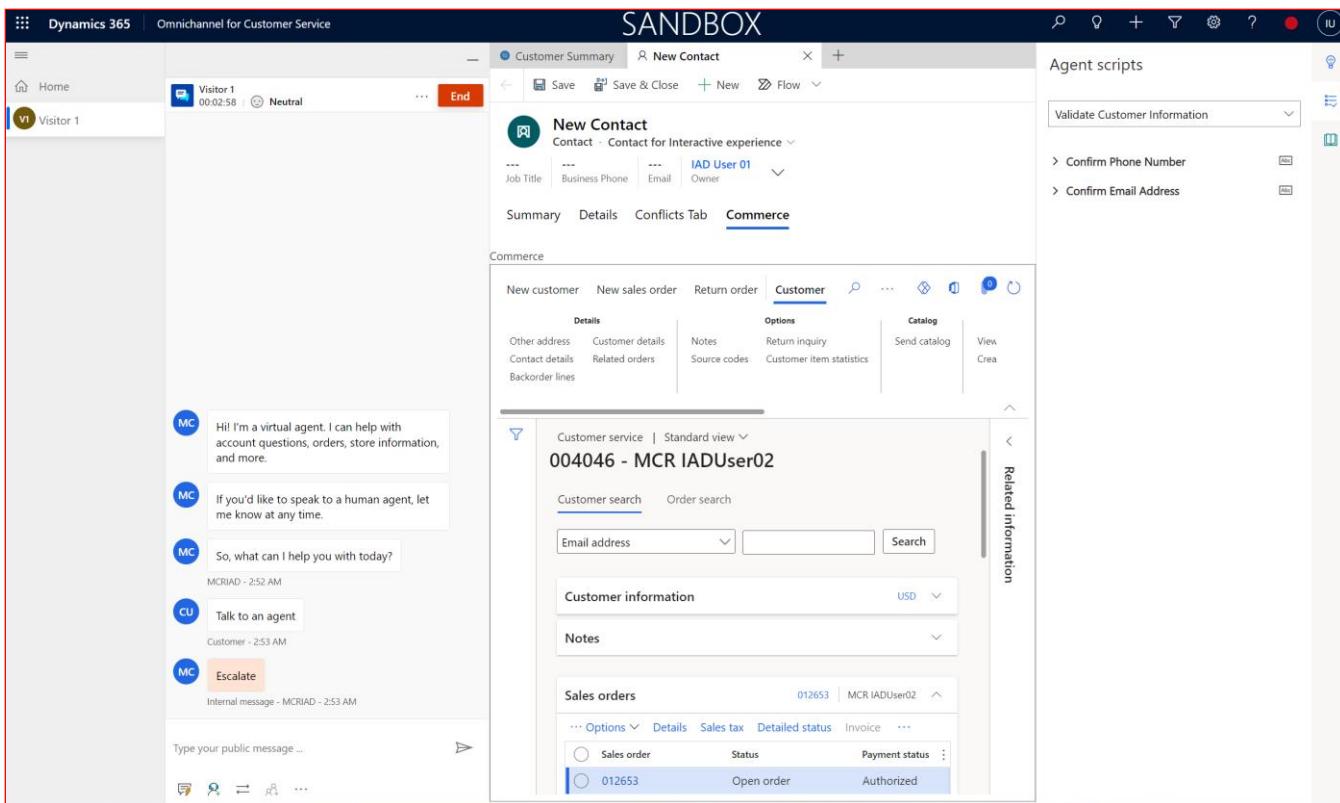
 Let's Chat!  
We're Online

**Congratulations!** In this exercise, you have successfully created & published an e-commerce page, its url and then embedded the chat widget into an e-commerce page.

## Exercise 4: Experience Escalation & Smart Assist Features

In this exercise, you will utilize the Smart Assist features and test the full experience you configured for the customer and customer service center agent. Starting from when the customer logs into the e-Commerce site, continuing with a PVA bot conversation, and ending with an escalation to a human agent who can help the customer to cancel an order and provide proper information in Dynamics 365 with Agent Scripts and Knowledge Articles.

The following screen shows Omnichannel Customer Service after a customer has been escalated to a live agent. This lab will conclude by bringing together all the components we've set up in previous exercises and show how the call agent can give personalized experiences with proposed insights directly in the application.

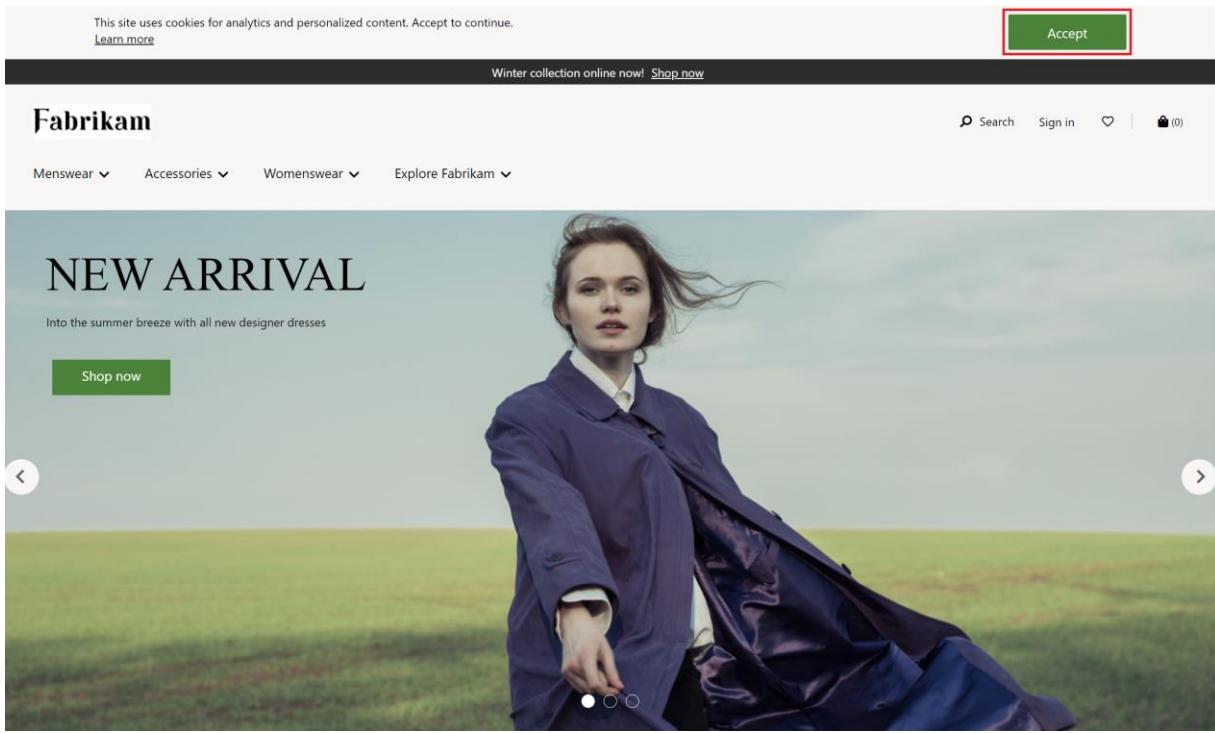


## Task 1: Customer creates an account, logs into e-Commerce Site and places an order

In this task, you will be creating a customer account, login with the new credentials and place an order.

1. Open the e-Commerce Site provided by your instructor and select **Accept** button on the top right edge of the site to accept the cookies. If you don't accept the cookies, then you might encounter an error in the checkout page.

*Note: If you are in instructor led training. Use the E-commerce site provided by your instructor in the training information document.*



2. Select **Sign in** on the top right edge of the screen.



3. Select **Sign up**

A comparison of the sign-in and sign-up interfaces. On the left, the 'Sign in' form has fields for 'Email address \*' and 'Password \*', both with required asterisks. It includes a 'Sign in' button and social media login options for Facebook and Microsoft. On the right, the 'Don't have an account?' section encourages users to 'Create an account with us to track your orders and save your favorites to the Wishlist.' It features a prominent 'Sign up' button highlighted with a red box. This visual comparison helps the user identify the correct path to account creation.

4. Provide a **First name, Last name** and a valid email on the field **Email address** and then select **Send verification code** button.

## Sign up

First name \*

Last name \*

Email address \*

**Send verification code**

5. A verification code would have been sent to the provided email.
6. Copy the email address from the email and paste it on the field **Verification code** and select the button **Verify code**.

Verification code \*

Verification code has been sent to your inbox. Please copy it to the input box below.

**Verify code**

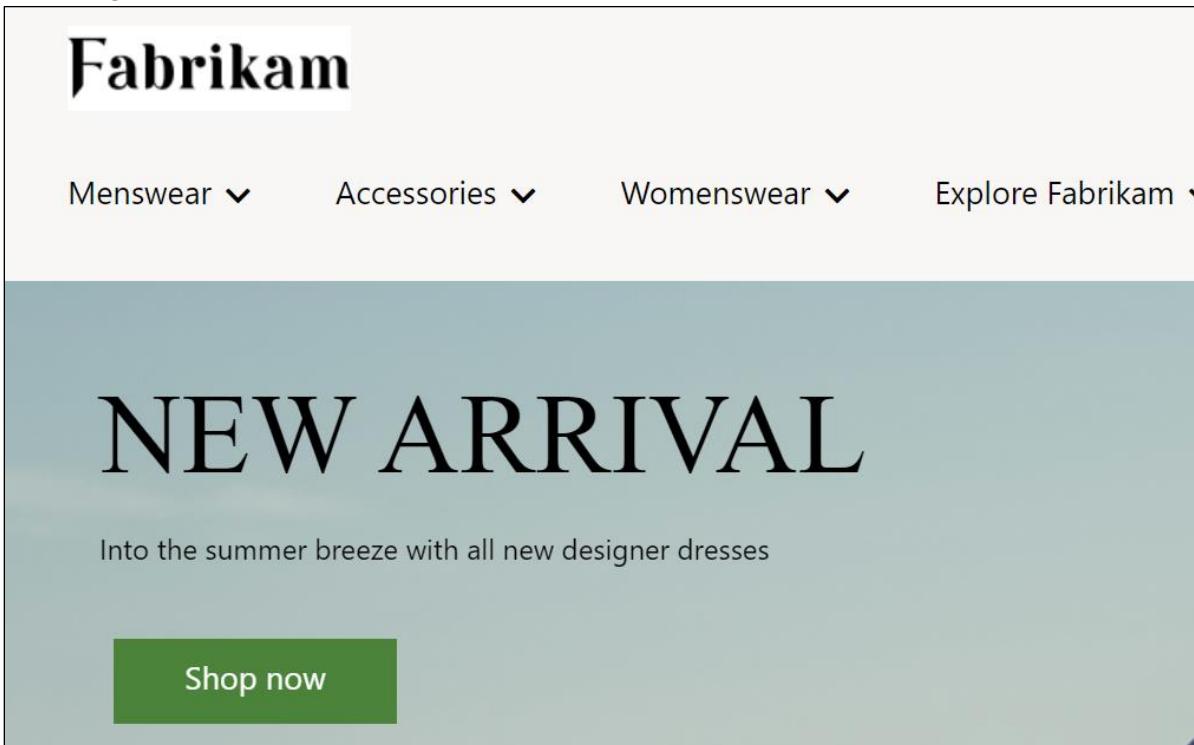
7. Enter a password, confirm the password and select **Sign up**.

Password \*

Confirm password \*

**Sign up**

8. The system will automatically navigate back to the homepage. Select **Shop now** button on the homepage.



9. Select an item, size and select **Add to Bag** button and then **View Bag and checkout** button.

# Silk Belted Sheath

\$98.00

This silk belted sheath dress creates an illuminating look.

Overnight shipping available

★★★★★ 12

Size

2

Quantity

-

1

+

In stock

Add to bag



10. Select **Checkout** button on the cart page.

## Order summary

Promo code

Enter a promo code

Apply

Subtotal

**\$98.00**

Estimated Shipping

**To be calculated**

Estimated Tax

**To be calculated**

TOTAL

**\$98.00**

Checkout

11. Provide a dummy shipping address details and select **Save & Continue** button.

1. SHIPPING ADDRESS

**Delivery** (1 item)



Name \*

Street \*

City \*

State \*

Zip code \*

Country \*

Phone

**Save & continue**

12. Select a delivery option and select **Save & continue**

2. DELIVERY OPTION

<input checked="" type="radio"/>	Standard	\$6.95
<input type="radio"/>	Standard overnight	\$25.00
<input type="radio"/>	2 Day Guaranteed Delivery	\$0.98

**Save & continue**

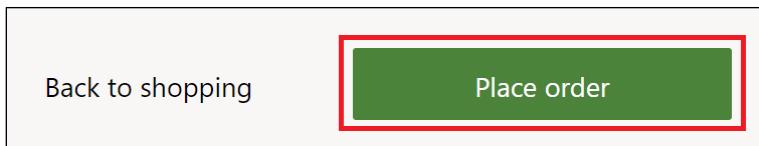
13. Provide the dummy test payment details below and select **Save & continue**

- a. **Card holder name** : Success
- b. **Card type** : VISA
- c. **Card number** : 4111111111111111
- d. **Expiration month** : 08-August
- e. **Expiration year** : 2024
- f. **Country/region** : United States of America
- g. **Address** : 123 Test
- h. **City** : Redmond
- i. **State/province** : WA
- j. **ZIP code** : 98052

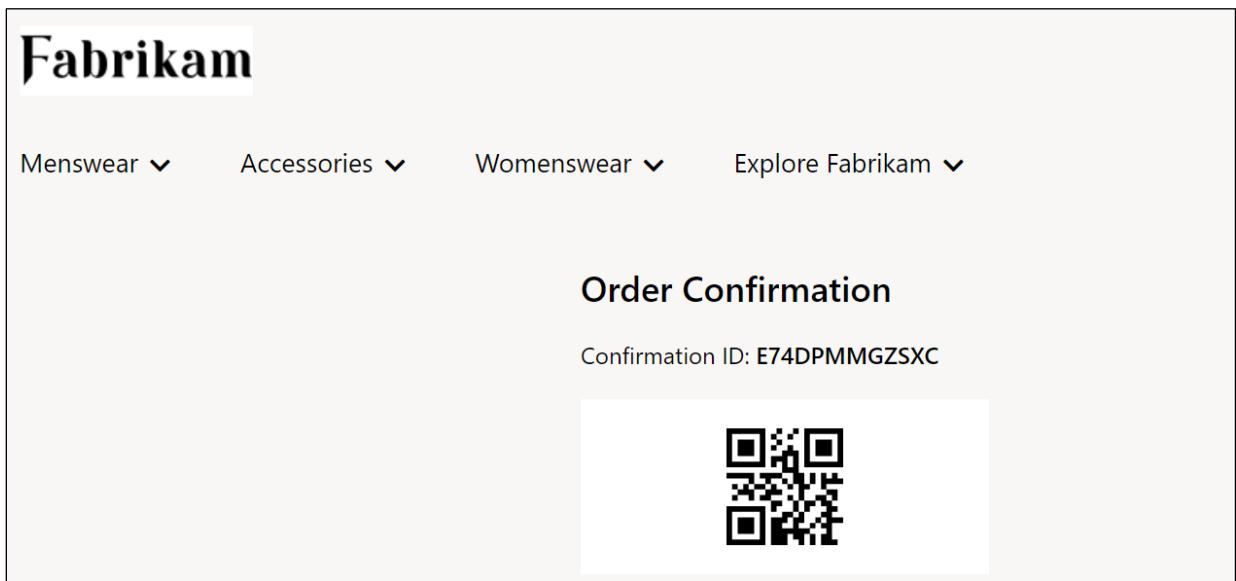
k. **Same as shipping address** : Set the checkbox to Yes.

Card details		Billing address		
Card holder name		Country/region		
Success		United States of America		
Card type		Address		
VISA		123 Test		
Card number		City	State/province	ZIP code
4111111111111111		Redmond	WA	98052
Expiration month		Expiration year		
08 - August		2024		
<b>Billing address</b>				
<input checked="" type="checkbox"/> Same as shipping address				
MCR IAD Test123 Redmond WA 98052 USA				
<b>Save &amp; continue</b>				

14. Select **Place order** button.



15. You will receive an order confirmation which indicates that the order has been successful.



**Congratulations!** You have learned the steps to create an order in a demo Fabrikam Retail website.

## Task 2: Agent logs into Omnichannel for Customer Service

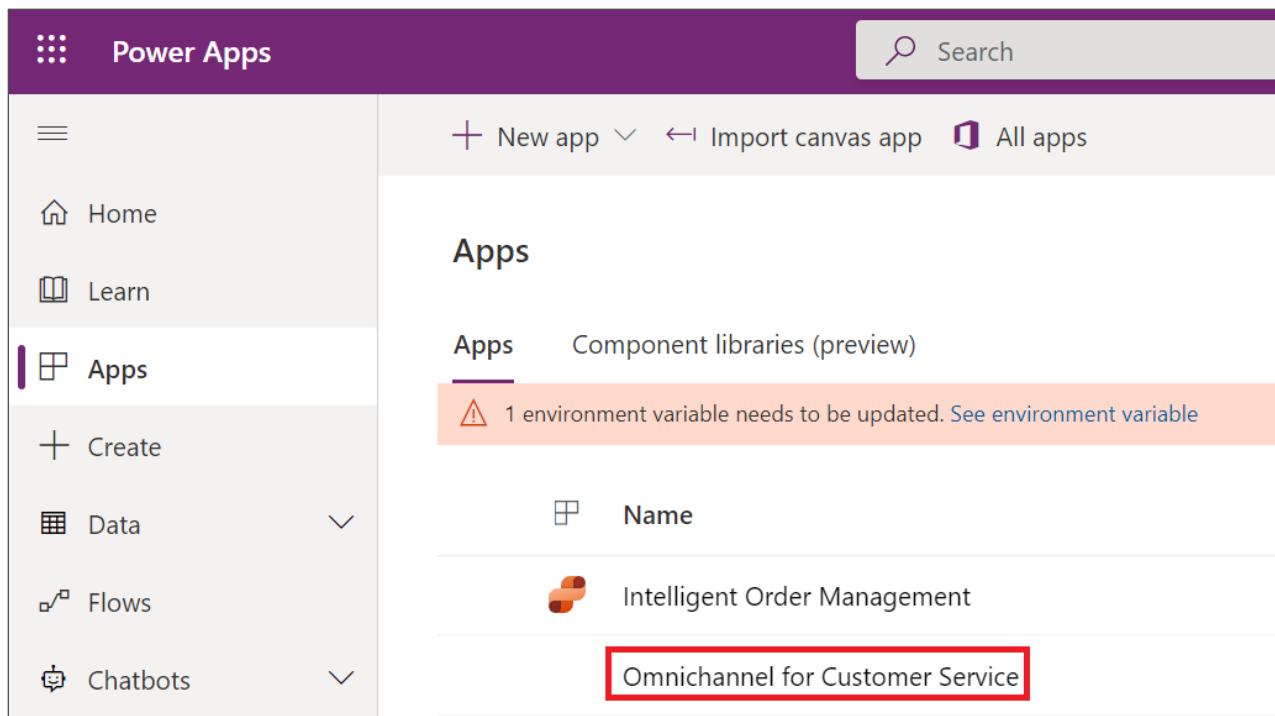
In this task, you will login into Omnichannel for Customer Service as a Customer agent.

1. Sign-in into D365 F&O Environment provided by your instructor. Currently, there is a limitation in this feature which expects the Customer service agent to open the F&O environment at the start of the day for this functionality to work.

*Note:* If you are in instructor led training. Use the D365 F&O URL provided by your instructor in the training information document.

2. In <http://make.powerapps.com>, navigate to Apps and open the **Omnichannel for Customer Service** app.

*Note:* If you are in instructor led training. Use the Dataverse environment provided by your instructor in the training information document.



3. In the **Omnichannel for Customer Service**, you should see a "Loading..." splash screen that goes through percentages. This ensures the live agent status is captured properly.

The screenshot shows the Dynamics 365 Omnichannel for Customer Service interface in a browser window titled 'Sandbox'. The top navigation bar includes 'Dynamics 365' and 'Omnichannel for Customer Service'. Below the header are tabs for 'Omnichannel Agent Dashboard', 'Omnichannel Cogn...', and 'Omnichannel Intra...'. The main content area is titled 'Omnichannel Agent Dashboard'. It features three sections: 'My work items' (3 items), 'Open work items' (0 items), and 'Closed work items' (0 items). Under 'My work items', there are three entries for 'Reed Flores: Live chat workstream' from 'Kelsey Bloomquist' at different times: 12/4/2020 7:03 AM, 12/4/2020 6:56 AM, and 12/4/2020 6:49 AM, each with a 'Wrap-up' button. A central message says 'Connecting to Omnichannel for Customer Service ... - 63% - Preparing to receive notifications'. At the bottom right of the dashboard is a small blue circular icon with a white question mark.

- a. If you don't see the splash screen and the presence indicator is grayed out, escalation into the app from the PVA bot won't work properly.
- b. Refresh again or close and reopen Omnichannel for Customer Service until the splash screen appears. You may need to close all other apps or close incognito altogether and sign back in.
4. Once your presence indicator is green on top right edge of the site, you are ready to accept customer escalations.

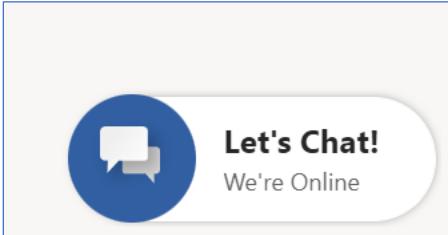


**Congratulations!** You have successfully logged in as both the customer and the live agent. Now it's time to start the PVA Bot conversation.

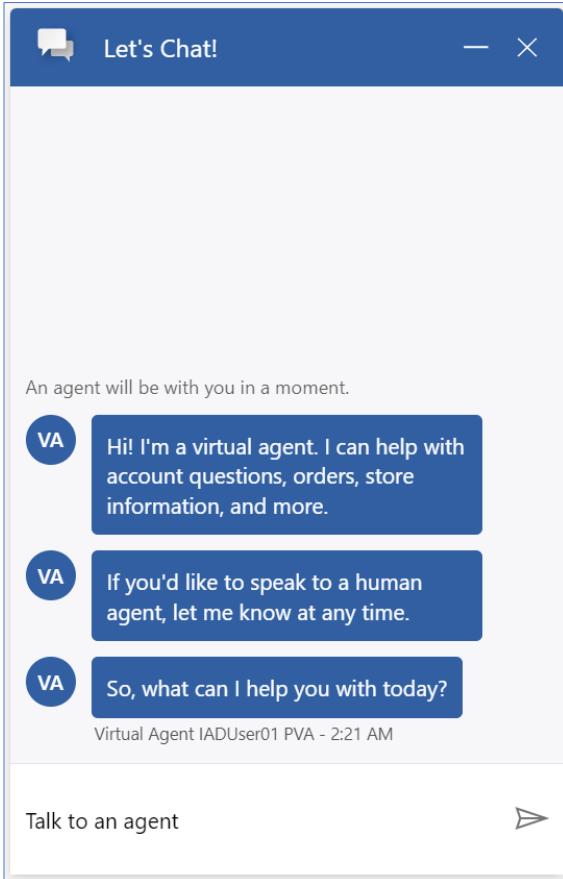
### Task 3: Customer Escalates through PVA Bot

In this task, you will act as a Customer and start chatting with a bot and then escalate the conversation to a human agent.

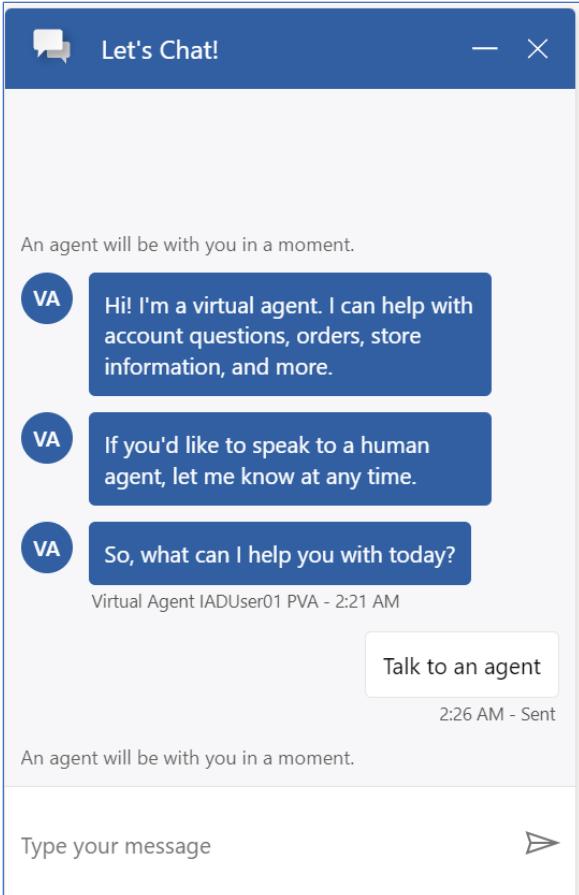
1. Open a new tab page in your browser and append the e-Commerce Portal's url at the end with the url name created in Exercise 5- Task 2. For Ex: <https://mcriad.commerce.dynamics.com/iaduserpage01>
2. Select **Let's Chat** PVA Bot chat widget in the bottom right corner of the site.



3. The PVA Chat bot will greet you.
4. Type **Talk to an Agent** in the next prompt to escalate to an agent and click on Enter key.



5. You will see the chat notifies you -- **An agent will be with you in a moment.**



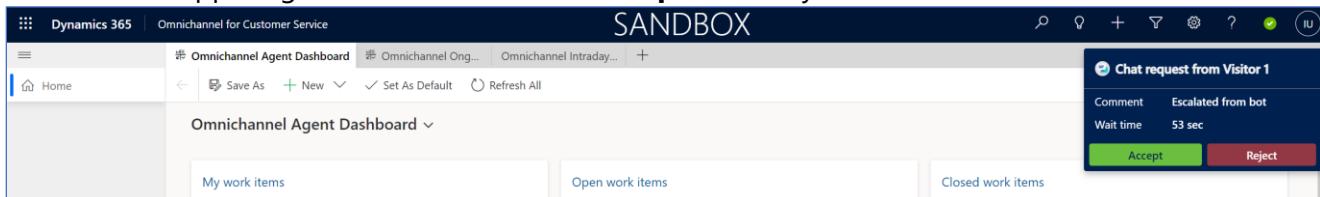
6. Now let's switch over to the Omnichannel for Customer Service app so you can accept the escalation as an agent.

**Congratulations!** You have successfully configured and started a conversation with the PVA Bot in the D365 Commerce site and asked to escalate to an agent in Omnichannel for Customer Service.

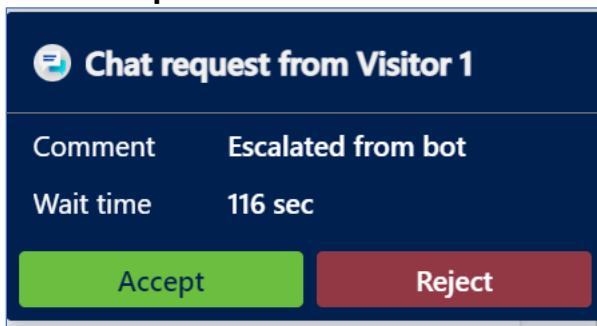
## Task 4: Agent Provides Personalized Service in Omnichannel for Customer Service with the Productivity Pane

In this task, you will act as the Customer Service Agent, accept the escalation from the PVA bot and assist the customer with their issue by using the productivity pane.

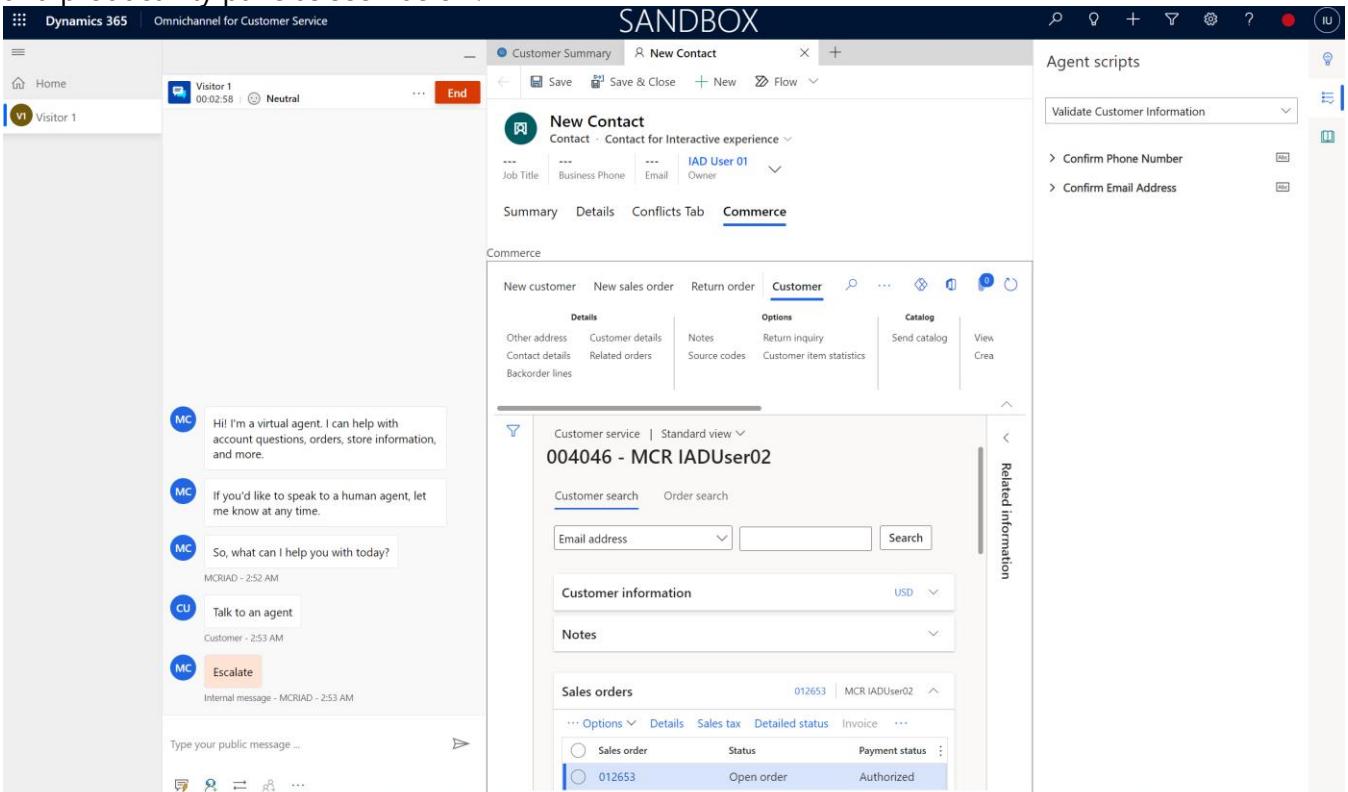
1. Navigate back to the **Omnichannel for Customer Service** app. You should be signed in as your IAD User.
2. Notice in the upper right corner there is a **Chat request** from your user.



3. Select **Accept** to start a conversation with the customer.



4. The page should reload, automatically identify the Customer although the data isn't present in Dataaverse and show the customer record along with Sales order details from D365 F&O, active chat, and productivity pane as seen below.



**Note:** Due to a known bug in the feature, if the customer isn't automatically detected and populated on the screen then follow the below steps to find the corresponding F&O customer:

- a) Select **+New contact** on the Customer Summary tab which will open a new contact tab.

The screenshot shows the Dynamics 365 Live Chat interface. On the left, there is a conversation window with a visitor named 'Visitor 1'. The visitor has asked 'So, what can I help you with today?'. The agent has responded with 'Customer Name : Giri, 1234' and 'Customer ID : MCRiad - 9:54 AM'. The visitor has asked for help with a topic, and the agent has responded with 'Sorry, I am not able to find a related topic. Can you rephrase and try again?' at 9:54 AM. The visitor has provided their name as 'Customer Name : Jennifer Beach' at 9:55 AM. The agent has responded again with 'Sorry, I am not able to find a related topic. Can you rephrase and try again?' at 9:55 AM. The visitor has requested to 'Talk to an agent'. The agent has escalated the message to 'Escalate' at 9:55 AM. A message box at the bottom says 'Internal message - MCRiad - 9:55 AM'. Below the conversation, there is a text input field 'Type your public message ...' and a set of icons for file attachments and other actions.

The right side of the interface shows the 'Customer Summary' tab for a 'New Conversation'. It includes a 'Details' section with a search bar for customers and buttons for '+ New Account' and '+ New Contact'. The 'Conversation summary' section shows that no pre-chat survey was found. The 'Conversation details' section provides engagement channel information ('Live Chat'), waiting time ('9 secs'), and queue details ('IADUser01 Escalate To Human').

- b) On the **New contact** tab, select **Commerce** and this will open the embedded F&O Customer Service screen.

Customer Summary    New Contact    X    +

← Save Save & Close New Flow ▾

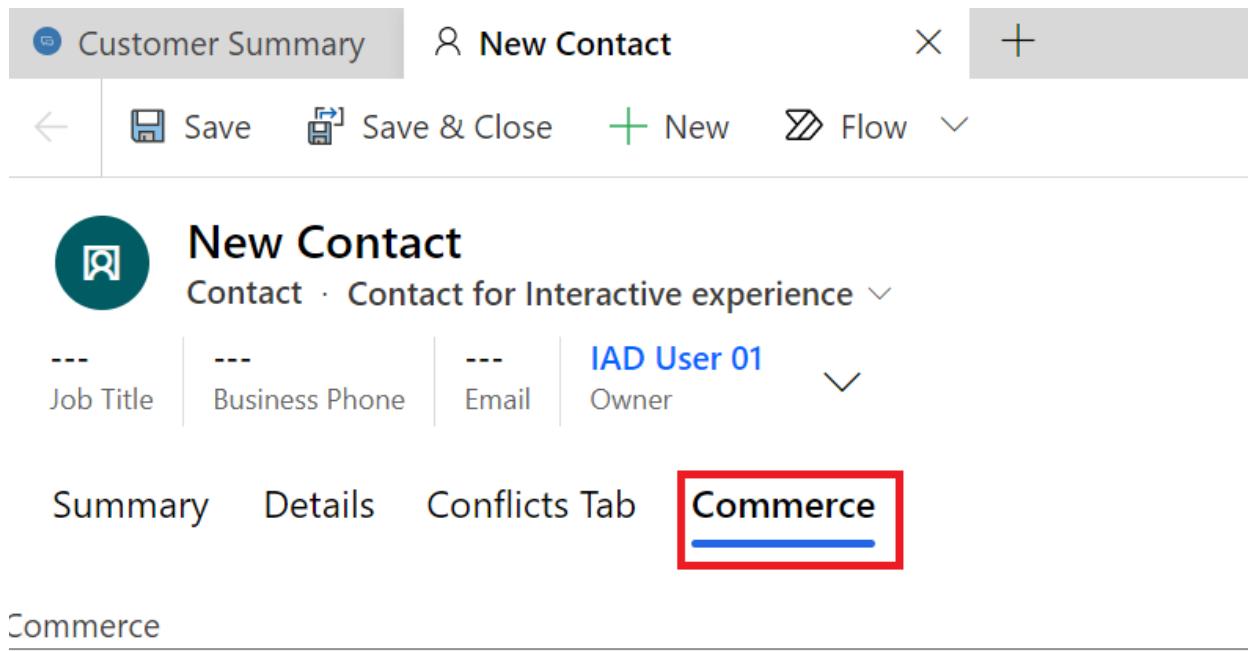
## New Contact

Contact · Contact for Interactive experience ▾

---	---	---	IAD User 01
Job Title	Business Phone	Email	Owner

Summary Details Conflicts Tab **Commerce**

Commerce



- c) Search the email address used to register on the e-Commerce site and then click on **Search** button which will open a Customer Search pop-up screen to select the customer.

**New Contact**  
Contact · Contact for Interactive experience

---

Job Title --- Business Phone --- Email IAD User 01 Owner

Summary Details Conflicts Tab **Commerce**

commerce

New customer New sales order Return order **Customer** ...

Details		Options		
Other address	Customer details	Notes	Customer item statistics	Campaign
Contact details	Related orders	Source codes	Prospect details	Call list
Backorder lines		Return inquiry	Sales quotation	Activity details

**Customer service** | Standard view

Customer service

Customer search Order search

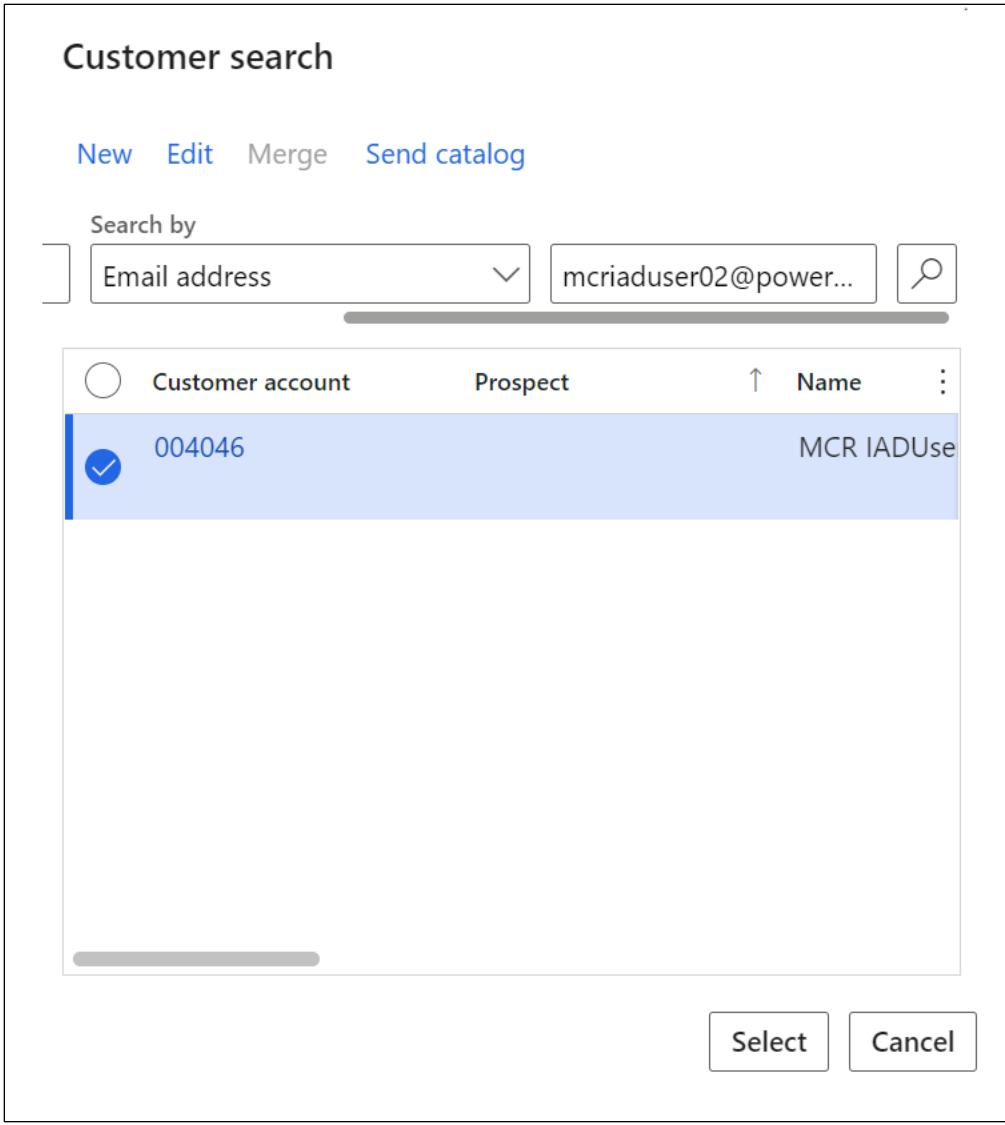
Email address **mcriaduser02@power...** **Search**

Customer information

Notes

Related information

- d) Select the customer and then click **Select** button.



- e) This should now populate the customer and its related details.

Summary Details Conflicts Tab **Commerce**

Commerce

New customer New sales order Return order **Customer** ...

Details	Options	Catalog
Other address Contact details Backorder lines	Customer details Notes Source codes	Return inquiry Customer item statistics
		Send catalog View catalog Create catalog

Customer service | Standard view ▾  
**004046 - MCR IADUser02**

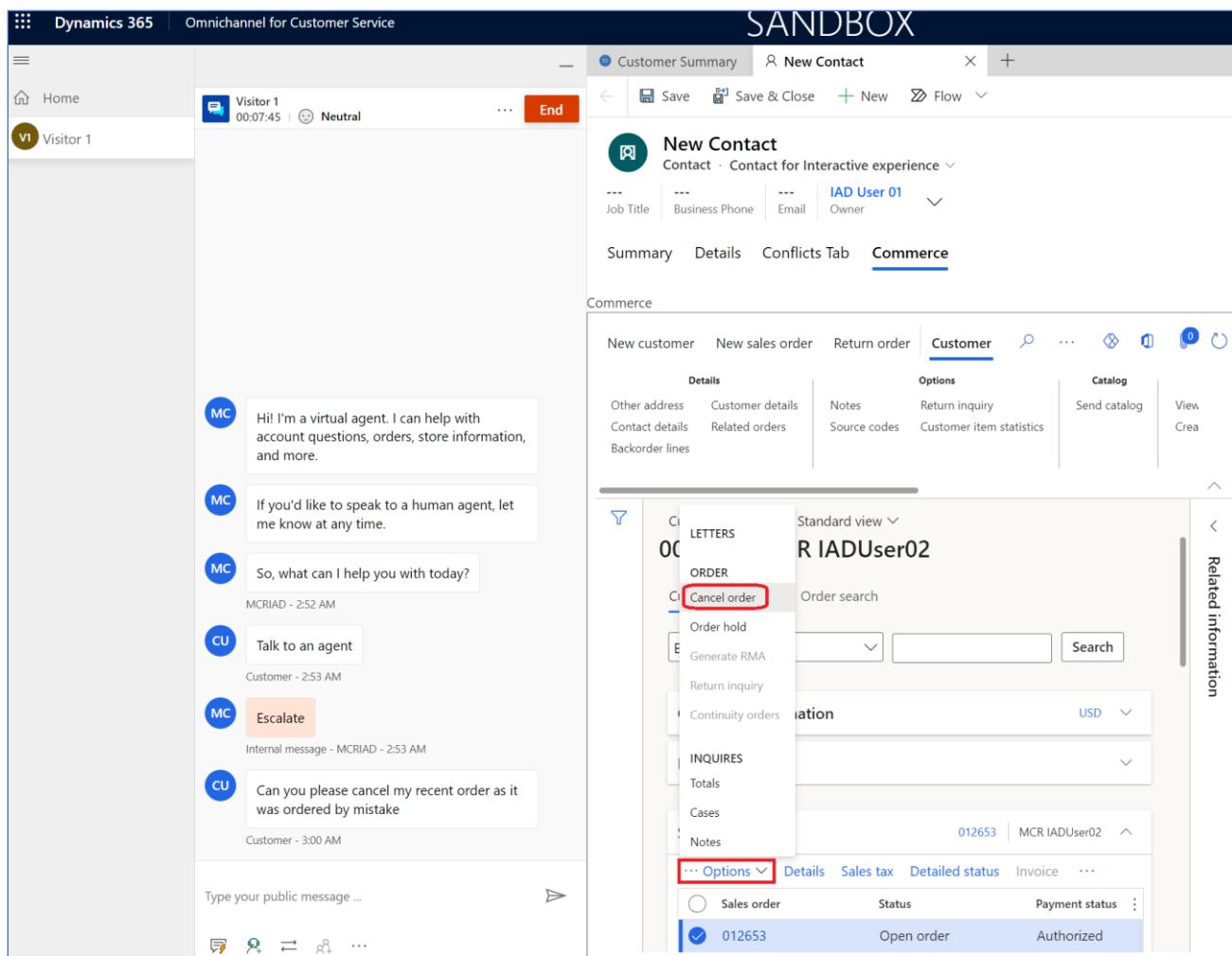
Customer search Order search

Email address  Search

**Customer information** USD ⌂

Name MCR IADUser02
Address Test123 Redmond, WA 98052 USA

5. As a customer, from the e-commerce site chat widget, request the agent to cancel the recent order as it was mistakenly ordered.
6. As an agent, click on **Options** menu on the sales orders tab, select the recent sales order and then select **cancel order** which will cancel the order. The agent can then confirm the customer that the order has been cancelled.



7. The customer can immediately verify the order status in the e-commerce site by clicking on the customer name on the top edge of the site and then selecting **Order history**.

The screenshot shows the Fabrikam e-commerce website. At the top, there's a navigation bar with 'Menswear', 'Accessories', 'Womenswear', 'Explore Fabrikam', and a search bar. The main content area displays an 'Order Confirmation' for a purchase placed on 2/26/2022 with confirmation ID E74DPMGZ5XC. In the bottom right corner, there's a user menu with options: 'My account' (highlighted with a red box), 'Order history', and 'Sign out'.

**Fabrikam**

Menswear ▾ Accessories ▾ Womenswear ▾ Explore Fabrikam ▾

[My account](#) / [Order history](#) / Order details

Order details

Online purchase

Order# 012653  
2/26/2022 | 1 item | FREE  
Confirmation ID: E74DPMMGZSXC



**Canceled** (1 item)

Image	Product Name	Size	Qty	Price	Status	Ship to
	Silk Belted Sheath	Size: 2	Qty: 1	\$98.00	Canceled	MCR IAD Test123 Redmond, WA 98052 USA

[Buy it again](#)

---

Subtotal \$98.00 Payment method

**Congratulations!** You have completed the full experience from logging in as a customer to the e-Commerce Site, conversing with the PVA bot, and escalating into Omnichannel for Customer Service to navigate the features for the agent.

***Note:** Exercise 5 and 6 are optional exercises. Do it only if you still have time left during the training session.*

## Exercise 5: Configure Agent Scripts

Fabrikam Retail wants to ensure they have proper tools in place to provide the best service and guidance during customer interactions.

Omnichannel for Customer Service has a **productivity pane** which is an auxiliary work area which contains tools that support or expedite an agent's tasks when engaging with customers. During a customer engagement, it will be embedded directly on the screen next to customer information and can be collapsed or expanded as needed.

See the following documentation to learn more about the productivity pane: [Productivity pane overview](#)

**Agent Scripts** are one of the tools in the productivity pane that agents can use to help with customer care. Agent Scripts provide guidance for a specific situation and help organizations be unified, accurate, and effective while also being faster and more efficient with customers. The scripts ensure that only accurate, company-endorsed information is being shared and help reduce error and improve customer satisfaction.

In this exercise, you will create an agent script to appear in the productivity pane in Omnichannel for customer service. The following screen shows the productivity pane on the right-hand side with the Agent Scripts tab

showing. The agent script selected is Validate Customer Information and there are two steps shown. You will not see this below output until the final exercise in this lab while testing escalation, however, you will be creating the components needed to display in the productivity pane later.

The screenshot shows the Dynamics 365 Omnichannel for Customer Service interface. On the left, a sidebar displays a visitor named "Visitor 1" with a timestamp of "00:02:58" and a status of "Neutral". The main area is titled "Sandbox" and shows a "New Contact" form for "Contact for Interactive experience". The contact details include "Job Title" (IAD User 01), "Business Phone", "Email", and "Owner". The "Commerce" tab is selected, showing tabs for "New customer", "New sales order", "Return order", and "Customer". The "Customer" tab is active, displaying a grid of sales orders. One order, ID 012653, is highlighted with a blue border. The "Related information" pane on the right shows "Agent scripts" with "Validate Customer Information" selected, and two steps: "Confirm Phone Number" and "Confirm Email Address".

## Task 1: Assign Productivity Tools Administrator Role

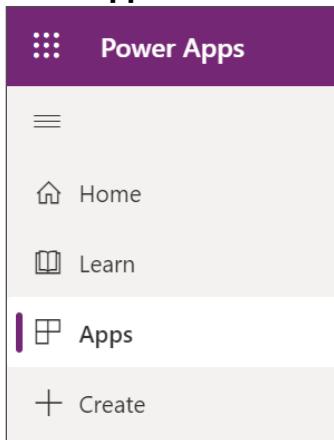
In this task, you will assign the necessary roles to your user to create and use agent scripts. Specifically, you will be adding the **Productivity tools administrator** and **Productivity tools user** roles. The Productivity tools administrator can do any action (create/read/write/append/delete) on the agent script, while the Productivity tools user only has read capabilities. Since we are creating them, we need the administrator role.

See the following documentation to learn more about these roles: [Assign roles and enable users for Omnichannel for Customer Service](#)

1. Using an In-Private or Incognito window, navigate to [Power Apps](#).
2. Select the correct environment from the upper right **Environment** drop down.



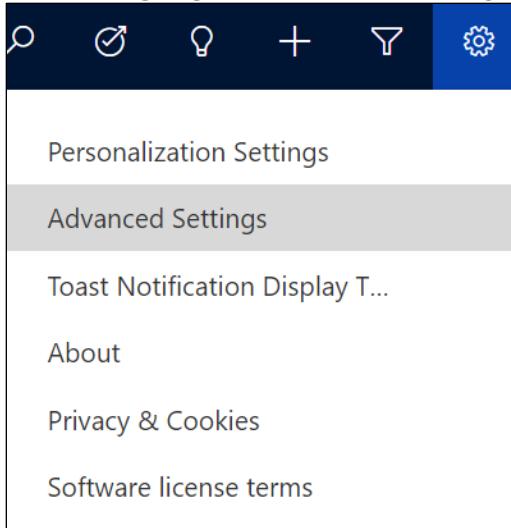
3. Select **Apps** on the left navigation bar.



5. Open the **Omnichannel Administration** app.

A screenshot of the "Apps" screen in Power Apps. At the top, there are tabs for "Apps" and "Component libraries (preview)". A red banner at the bottom says "⚠️ 4 environment variables need to be updated. See environment variables". The main area shows a table with columns "Name" and "Modified". There are two entries: "Omnichannel admin center" (modified 3 wk ago) and "Omnichannel Administration" (selected, modified 3 wk ago). The "Omnichannel Administration" row has a checkmark icon and a gear icon.

6. Select the **gauge icon** in the upper right corner and navigate to **Advanced Settings**.



7. A new window should open and navigate to Dynamics 365. It may take a while to load. If it's been longer than a minute, stop and reload the page. It should then load faster.

8. In **Dynamics 365**, select **Settings > Security**.

A screenshot of the Dynamics 365 Settings page. The top navigation bar shows 'Dynamics 365' and 'Business Management'. Below the navigation is a red banner with a gear icon and the word 'Settings'. The main content area is divided into three columns: 'Business', 'Customization', and 'System'. Under 'System', the 'Security' option is highlighted with a grey background. Other options in the 'System' column include Administration, Data Management, System Jobs, Document Management, and Auditing. The other columns contain links for Business Management, Templates, Product Catalog, Service Management, Sync Error, Customizations, Solutions, Microsoft AppSource, Plug-In Trace Log, and Solutions History.

9. Under Security, select **Users**.

A screenshot of the Security page under the 'Users' section. The title 'Security' is at the top. Below it is a heading 'Which feature would you like to work with?'. A 'Users' card is visible, featuring a user icon, the word 'Users', and a description: 'Add new users. Edit information about users and deactivate user records. Manage the teams, roles, and licenses assigned to users.'.

10. Switch the view drop down from Omnichannel Users to **Enabled Users** for the grid view so that your user will show in the list.

The screenshot shows a dropdown menu titled 'Omnichannel Users'. Under the heading 'System Views', there is a list of user categories. The 'Enabled Users' option is highlighted with a light blue background. Other options include '@Me', 'Access Mode Interactive Users', 'Administrative Access Users', 'Administrators', 'Agents', 'All', 'Application Users', 'Associated Record Team Members', 'Bot agents', 'Bot Users', 'By Me', 'Disabled Users', 'Disabled users consuming licenses', 'Enabled Users' (which is selected), and 'Full Access Users'.

11. While in the Enabled User list, scroll down to **find your user** or use the **Search bar**.

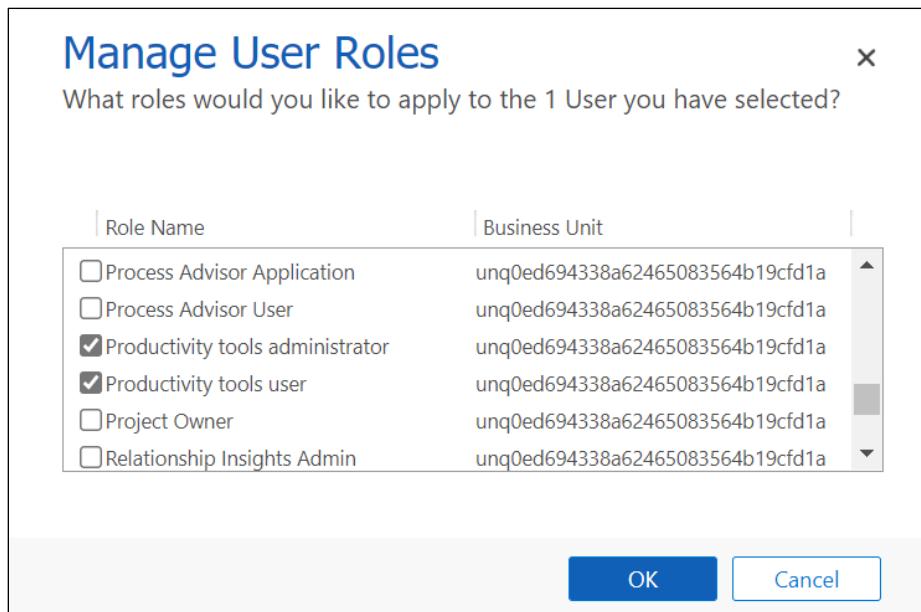
The screenshot shows a grid view titled 'Search Results'. The search bar at the top contains the text 'iad'. The grid has columns for 'Full Name ↑', 'Position', 'Main Phone', 'Business Unit', 'Site', 'Title', and 'Primary Email'. A single row is visible, representing 'IAD User 01' with the primary email listed as 'IADUser01@PowerPlatformOp...'. There are also 'Charts' and 'Print' buttons on the right side of the grid header.

12. Select your user for the training and select **Manage Roles** on the top command bar.

The screenshot shows the Dynamics 365 Security page. At the top, there is a navigation bar with 'Dynamics 365', 'Settings', and 'Security' tabs. The 'Security' tab is active and has a 'Sandbox' indicator. Below the navigation bar, there are buttons for '+ NEW', 'EDIT', 'APPROVE EMAIL', 'REJECT EMAIL', 'PROMOTE TO ADMIN', 'MANAGE ROLES' (which is highlighted in blue), and 'CHANGE BUSINESS UNIT'. The main area is titled 'Search Results'. It shows a grid with columns for 'Full Name ↑', 'Position', 'Main Phone', 'Business Unit', and 'Site'. A single row is selected, showing 'IAD User 01' with the primary email 'unq0ed694338a62465...'. The 'MANAGE ROLES' button is also present in this grid header.

13. Scroll down and select the following two roles to your user and select **OK**.

- a. **Productivity tools administrator**
- b. **Productivity tools user**



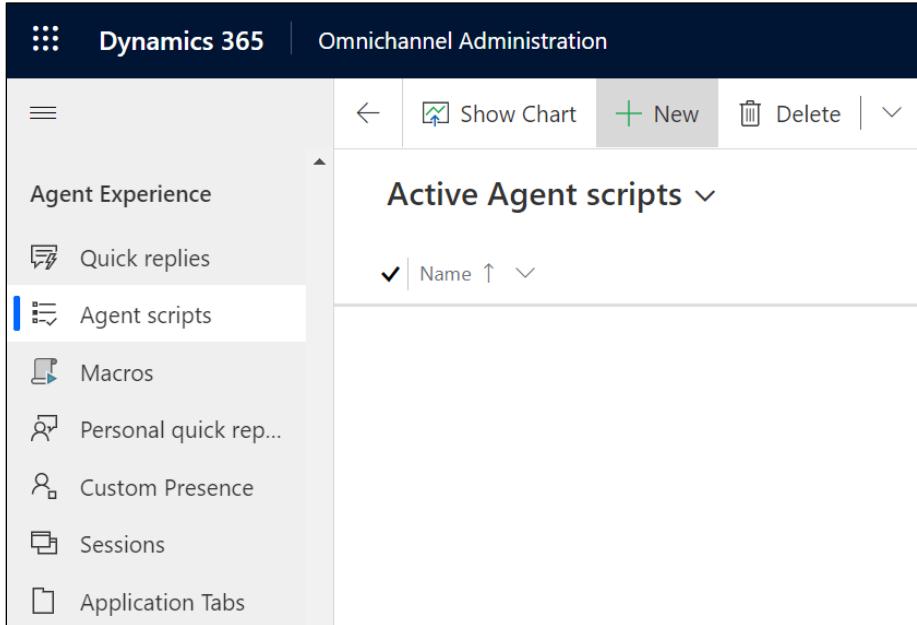
*Note: You will assign more roles in this lab. It is recommended to leave the User screen open.*

**Congratulations!** You have successfully assigned the necessary **Productivity tools** user roles to set up and use agent scripts.

## Task 2: Create an Agent Script

In this task, you will create an agent script in the Omnichannel Administration app. This script will guide the agent to **validate customer information** when a conversation is initiated between a customer and an agent in Omnichannel for Customer Service. The script will have two steps, one to **confirm phone information** and another to **email address**. This task will guide you through creation of this agent script and its steps.

1. Navigate to **Omnichannel Administration** application which you opened in the first task.
2. In the left navigation bar, under **Agent Experience**, select **Agent Scripts**.
3. On the **Active Agent scripts** page, select **+New**.



4. For the **New Agent script** record, specify the following:
  - a. **Name:** Validate Customer Information <<UserName>>
  - b. **Unique Name:** msdyn\_ValidateCustomerInformation<<UserName>>

The screenshot shows the 'Validate Customer Information' Agent script record. The title bar says 'Validate Customer Information - Saved' and 'Agent script'. The 'General' tab is selected. The form fields are:

- Name: \* Validate Customer Information
- Unique Name: \* msdyn\_ValidateCustomerInformation
- Owner: \* IAD User 01 (with a search icon)
- Language: \* English (United States)
- Description: ---

5. Click **Save**. The **Agent script steps** should appear on the right

Validate Customer Information - Saved  
Agent script

General Related

Name	* Validate Customer Information
Unique Name	* msdyn_ValidateCustomerInformation
Owner	IAD User 01
Language	English (United States)
Description	---

Agent script steps

Name	Action type	Modified On
No data available.		

+ New Agent script step :

6. In the **Agent script steps** section, select **+New Agent script step**.

Agent script steps

Name	Action type	Modified On
No data available.		

+ New Agent script step :

7. Quick Create form for the **Agent script step** appears. Specify the following fields:
- Name:** Confirm Phone Number <<UserName>>
  - Unique Name:** msdyn\_ConfirmPhone<<UserName>>
  - Order:** 1
  - Action type:** Text
  - Text instructions:** Ask customer to confirm phone number.

Quick Create: Agent script step

Name	* Confirm Phone Number
Unique Name	* msdyn_ConfirmPhone
Owner	* <input type="text" value="IAD User 01"/> <input type="button" value="X"/> <input type="button" value="Search"/>
Agent script	<a href="#">Validate Customer Information</a>
Order	* 1
Action type	* Text
Text instructions	* Ask customer to confirm phone number

8. Click **Save and Close**. Now let's add another step.
9. In the **Agent script steps** section, select **+New Agent script step** again.

Agent script steps			<a href="#">+ New Agent script step</a>	<a href="#">:</a>
<input checked="" type="checkbox"/> Name	Order ↑	Action type	Modified On	
<a href="#">Confirm Phone Number</a>	1	Text	9/13/2021 3:19 PM	

10. Another **Quick Create** form for the **Agent script step** appears. Specify the following fields:
  - a. **Name:** Confirm Email Address <<UserName>>
  - b. **Unique Name:** msdyn\_ConfirmEmailAddress <<UserName>>
  - c. **Order:** 2
  - d. **Action type:** Text
  - e. **Text instructions:** Ask Customer for Email Address. Verify their response matches information on file.

Quick Create: Agent script step

Name	<b>* Confirm Email Address</b>
Unique Name	<b>* msdyn_ConfirmEmailAddress</b>
Owner	<b>IAD User 01</b> <input type="button" value="X"/> <input type="button" value="Search"/>
Agent script	<b>Validate Customer Information</b>
Order	<b>2</b>
Action type	<b>Text</b>
Text instructions	<b>Ask Customer for Email address. Verify their response matches information on</b>

11. Select **Save and Close**. Both steps should now be in the **Agent script steps** table.

Agent script steps			
	Name	Order ↑	Action type
	✓ Confirm Phone Number	1	Text
	Confirm Email Address	2	Text

12. The agent script is now complete. Select **Save & Close**.

Validate Customer Information - Saved

General	Related												
Name: <b>Validate Customer Information</b> Unique Name: <b>msdyn_ValidateCustomerInformation</b> Owner: <b>IAD User 01</b> Language: <b>English (United States)</b> Description: <b>---</b>	Agent script steps <table border="1"> <thead> <tr> <th></th> <th>Name</th> <th>Order ↑</th> <th>Action type</th> </tr> </thead> <tbody> <tr> <td></td> <td>✓ Confirm Phone Number</td> <td>1</td> <td>Text</td> </tr> <tr> <td></td> <td>Confirm Email Address</td> <td>2</td> <td>Text</td> </tr> </tbody> </table>		Name	Order ↑	Action type		✓ Confirm Phone Number	1	Text		Confirm Email Address	2	Text
	Name	Order ↑	Action type										
	✓ Confirm Phone Number	1	Text										
	Confirm Email Address	2	Text										

**Congratulations!** You have completed creating an agent script with two steps to validate customer information, including phone number and email address.

### Task 3: Create a Session Template and associate the Agent Script to it

In this task, you will associate the agent script with a session template so it will load for agents based on the type of session they've opened. We will be associating the agent script we just created with a new **chat session** which is similar to the default chat session. This is the default chat session that opens during an escalation to an agent in Customer Service Center.

1. Open the **Omnichannel Administration** app in Power Apps if you aren't already in it.

The screenshot shows the 'Apps' screen of the Omnidirectional Administration app. At the top, there are two tabs: 'Apps' (which is selected) and 'Component libraries (preview)'. Below the tabs, a red warning bar displays the message '⚠️ 4 environment variables need to be updated. See environment variables'. The main area is a table with columns 'Name' and 'Modified'. It lists two apps: 'Omnichannel admin center' and 'Omnichannel Administration'. The 'Omnichannel Administration' app is selected, indicated by a checkmark icon next to its name.

Name	Modified
Omnichannel admin center	3 wk ago
<b>Omnichannel Administration</b>	3 wk ago

2. In the left navigation bar, under **Agent Experience**, select **Sessions**.

The screenshot shows the 'Agent Experience' navigation bar. The 'Sessions' option is highlighted with a blue vertical bar on its left, indicating it is the active section. Other options include 'Quick replies', 'Agent scripts', 'Macros', 'Personal quick rep...', 'Custom Presence', 'Application Tabs', and 'Notifications'.

3. Select **+New** to create a new session template.



## Active Session Templates ▾

4. Specify the following fields:

- a. **Name** : Chat session - <<UserName>>
- b. **Unique Name**: msdyn\_chat\_<<UserName>>
- c. **Type** : Generic
- d. **Title** : {customerName}
- e. **Description** : This is the session template for <<UserName>> chat channel.
- f. **Anchor Tab** : Customer Summary

Save & Close New Flow

! Make sure to choose the right session template type—once you save, the type can't be changed.

### New Session Template - Unsaved

**General** Agent scripts

Name	* Chat session - IADUser01
Unique Name	* msdyn_chat_IADUser01
Type	* Generic
Title	{customerName}
Communication panel mode	* Docked
Description	This is the session template for IADUser01 chat channel
Owner	<input type="button" value="IAD User 01"/> <input type="button" value="X"/> <input type="button" value=""/>

Anchor Tab \*  Customer Summary

5. Select **Save** button on the command bar.
6. Select the **Agent scripts** tab. In the **Agent scripts** section, select **Add Existing Agent script**.

### Chat session - default

Session Template

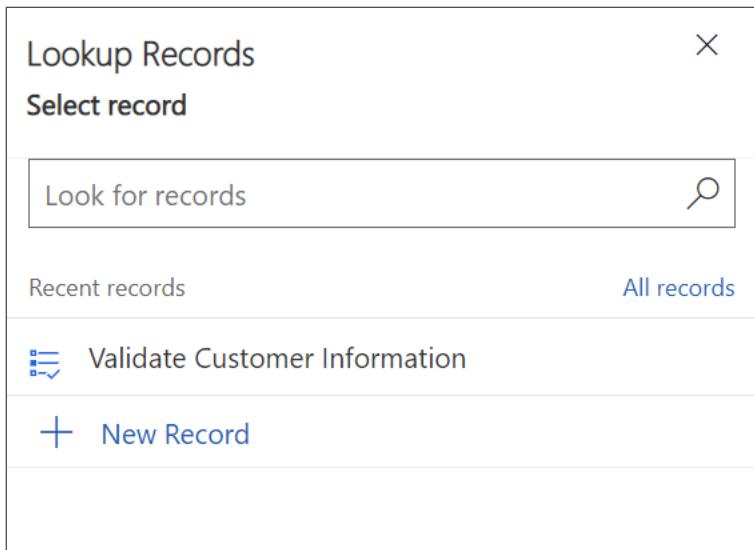
General Agent scripts Related

Agent scripts

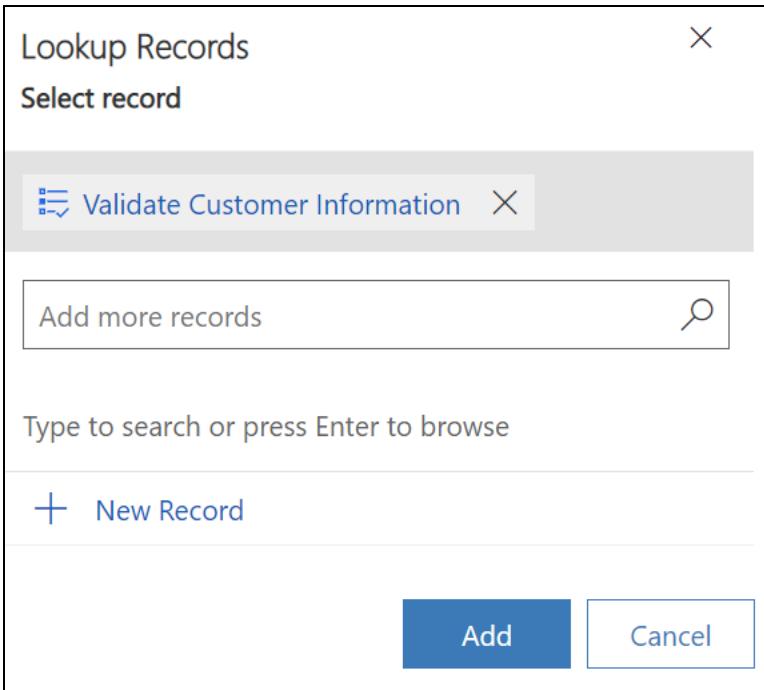
Add Existing Agent scr...

Name	Created On
No data available.	

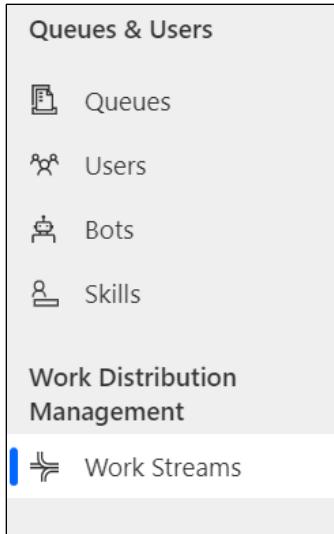
7. The **Lookup Records** pane should appear on the right.



8. Select the **Validate Customer Information** <<UserName>> agent script from the list that you created in Task 2 and click **Add**.



9. Navigate to **Work Streams**.



10. Select the workstream created in Exercise 1 – Task 3.

11. Select **Templates** Tab on the workstream.

IADUser01 Chat Workstream - Saved  
Work Stream

Push Work Distribution Mode Live chat Channel

Work Distribution Context Variables Skill Attachment Rules Routing Rules **Templates** Smart assist Quick Replies

Sessions

Default	Chat session - default
---------	------------------------

Notifications

Incoming unauthenticated	Chat - incoming unauthenticated - default
Incoming authenticated	Chat - incoming authenticated - default
Consult	Chat consult - default
Transfer	Chat - transfer - default
Supervisor Assign	Chat- supervisor assign - default

12. Modify the value in the field **Default** to Chat session - <<UserName>> and Select **Save** button in the command bar.

ⓘ Omnidchannel configuration changes take up to 15 minutes to reflect.

## IADUser01 Chat Workstream - Saved

Work Stream

Work Distribution   Context Variables   Skill Attachment Rules   Routing Rules   **Templates**

Sessions

Default   [Chat session - IADUser01](#)

**Congratulations!** You have successfully created an agent script with two steps and associated the agent script with the default chat session. Now your agents can use this script during a default chat session with a customer.

# Exercise 6: Configure Knowledge Articles

**Note:** If you are in an instructor led lab then please skip this exercise and tasks as this has been completed by your instructor. Your instructor will demonstrate the steps to review the pre-created knowledge article.

In this exercise, you will learn how to create and manage **Knowledge Articles** that can address any number of issues your customers would like to discuss during the Omnichannel Customer Service conversation. These knowledge articles will appear in the productivity pane in Omnichannel for Customer Service through AI-enabled suggestions.

## Task 1: Assign Knowledge Manager User Role

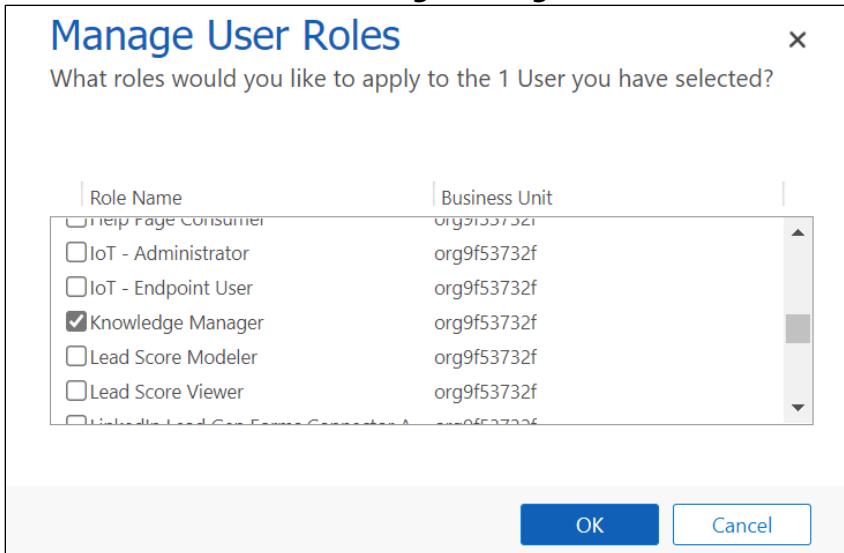
In this task, we will assign the necessary user role to create and view knowledge articles.

1. If you kept the User Settings page up from the previous exercise, navigate to that page. If you didn't leave it open, follow all the steps in Exercise 2, Task 1 and then return here to assign the proper role.
2. Once you've selected your user and clicked **Manage Roles**, you must assign the necessary role(s).

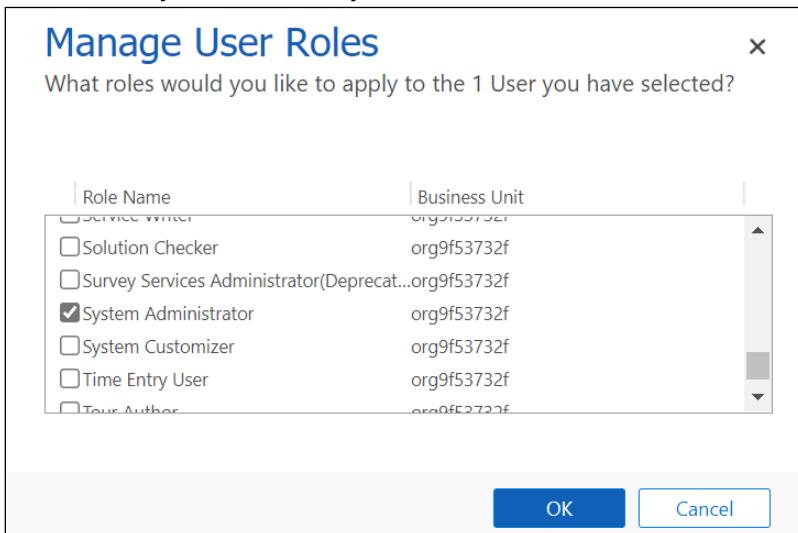
The screenshot shows the Dynamics 365 interface with a dark theme. At the top, there's a navigation bar with 'Dynamics 365', 'Settings', and 'Security' tabs. On the right of the bar, it says 'SANDBOX'. Below the bar, there are several buttons: '+ NEW', 'EDIT', 'APPROVE EMAIL', 'REJECT EMAIL', 'PROMOTE TO ADMIN', 'MANAGE ROLES' (which is highlighted in blue), and 'CHANGE BUSINESS UNIT'. A search bar labeled 'Search Results' is present. Below the search bar is a table with columns: 'Full Name ↑', 'Position', 'Main Phone', 'Business Unit', and 'Site'. Two rows are visible: one with a checked checkbox and another for 'IAD User 01' with a long ID.

3. There are three roles you can choose with [create/read permissions for Knowledge Articles](#).
  - i. Knowledge Manager
  - ii. Customer Service Representative

4. For this lab, select the **Knowledge Manager** role.



5. Also ensure you have the System Administrator role. Official training users have it assigned.



6. Select **OK** to close the Manage User Roles window and accept changes.

**Congratulations!** You have assigned the proper roles to create and read knowledge articles.

## Task 2: Set up Knowledge Management Settings

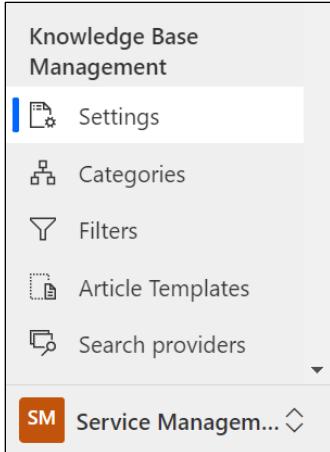
1. In [Power Apps](#), open the **Customer Service Hub** app.

The screenshot shows the Power Apps portal interface. On the left, there's a navigation bar with options like Home, Learn, Apps (which is selected), Create, Dataverse, Flows, and Chatbots. The main area is titled 'Apps' and shows two entries: 'Customer Service workspace' and 'Customer Service Hub'. A message at the top right says '10 environment variables need to be updated. See environment variables'. The 'Customer Service Hub' entry has a modified date of '3 wk ago'.

1. In Customer Service Hub, on the left navigation bar, go to the bottom left corner where there's a drop down that says **Service**. Select it and change the area to **Service Management**.

The screenshot shows the left navigation bar of the Customer Service Hub. It includes sections for Home, Recent, Pinned, My Work (with Dashboards and Activities), Customers (Accounts, Contacts, Social Profiles), Service (Cases, Queues), Knowledge (Knowledge Articles), and a 'Change area' dropdown. The 'Change area' dropdown is open, showing options: Service (which is checked), Service Management (which is selected), Scheduling, Help and Support, and Service (which is highlighted in blue).

2. Once in the Service Management area, scroll down to **Knowledge Base Management** section and select **Settings** in the left navigation.



3. **Record Types** allows you to configure the record types you want to turn on for knowledge management.
- The list will include all entities that are available for an N:N relationship.
  - Knowledge management is enabled for **Case** table by default. Because our scenario will also use the Case table, **we don't need to add any additional tables at this time.**

The screenshot shows the 'Record Types' configuration screen. It has two main sections: 'Available' and 'Selected'. The 'Available' section lists various entities, with 'Account' currently selected (highlighted in blue). The 'Selected' section lists 'Case' and 'Contact', both of which are highlighted with red boxes. Between the two sections are four buttons: '>', '>>', '<<', and '<'. Below the 'Available' list is a scroll bar.

4. For Support Portal Connection, this allows you to integrate an external portal for publishing knowledge articles.
- Selecting Yes would share the knowledge article as a link in the email sent to the customer.
  - Selecting No would share the article content inserted in the email body.
  - Keep as **No** as we will not be integrating an external portal connection

The screenshot shows the 'Support portal connection' settings. It includes a note: 'To share knowledge article as URLs, you'll need to first set up an external portal and turn on the setting below.' Below this is a section titled 'Use an external portal' with a toggle switch. The switch is currently set to 'No' (indicated by a grey circle) and has a blue outline.

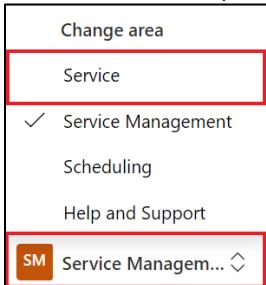
5. In the **Knowledge Articles Feedback** section, set **Enable users to provide feedback on knowledge articles from search control** to **Yes**. This will allow users to provide feedback on knowledge articles opened from knowledge search control.

The screenshot shows the 'Knowledge articles feedback' settings. It includes a note: 'Enable users to provide feedback on knowledge articles from search control.' Below this is a section titled 'Enable feedback' with a toggle switch. The switch is currently set to 'Yes' (indicated by a blue circle) and has a blue outline.

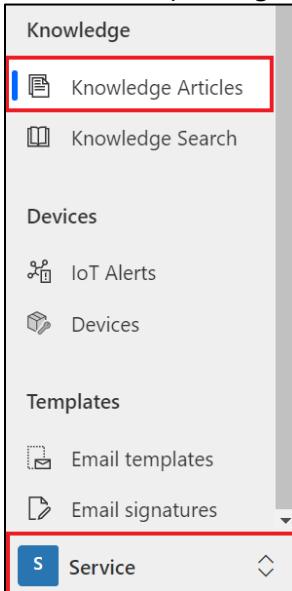
### Task 3: Create Knowledge Article

In this task, you will create a new knowledge article about Return conditions for agents to access during customer conversations.

1. In **Customer Service Hub**, on the left navigation bar, go to the bottom left corner where you previously modified the drop down. Change it back from Service Management to **Service**.



2. In the sitemap, navigate to **Service > Knowledge Articles**.



3. Select **New on the command bar**.

SANDBOX

Show Chart + New New From Template Delete Refresh Flow Excel Templates Export to Excel

Search this view

My Active Articles

Article Public N... Title Status Major Version N... Minor Version N... Views Modified On Language

No data available.

Home Recent Pinned My Work Dashboards Activities Customers Accounts Contacts Social Profiles Service Cases Queues Knowledge Knowledge Articles Knowledge Search Devices IoT Alerts All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

0 - 0 of 0 (0 selected)

4. You should be on the **Content** tab of a new knowledge article.

New Knowledge Article

New Process Active for less than one mi... Author (< 1 Min) Review Publish

Content Summary Analytics

ARTICLE CONTENT

Title	*	---	Description	---
Keywords	+	---		

English - United States Language Proposed Status Reason

5. On the **Article Content section** of the new knowledge article, specify the following details:

- Title:** Returns conditions
- Keywords:** Gift returns, Condition for Returns, Return Conditions
- Description:** Conditions for Returns

New Knowledge Article - Unsaved

New Process Active for less than one mi... Author (< 1 Min) Review Publish

Content Summary Analytics

ARTICLE CONTENT

Title	*	Returns conditions	Description	Conditions for Returns
Keywords	+	Gift returns, Condition for Returns, Return Conditions		

Please use the attachments function in the knowledge article editor instead of adding attachments in the notes section to search for knowledge article attachments in the portal. If you have "Sync knowledge article attachments to portal" turned on, then knowledge article attachments will automatically be synced to the notes attachment here. Learn more at <https://go.microsoft.com/fwlink/?linkid=2172080>.

English - United States Language Proposed Status Reason

- d. In the **Content** section, copy and paste the content for your knowledge article.

## Conditions for Returns

In order for the Goods to be eligible for a return, please make sure that:

- The Goods were purchased in the last 14 days
- The Goods are in the original packaging
- The following Goods cannot be returned:
  - The supply of Goods made to Your specifications or clearly personalized.
  - The supply of Goods which according to their nature are not suitable to be returned, deteriorate rapidly or where the date of expiry is over.
  - The supply of Goods which are not suitable for return due to health protection or hygiene reasons and were unsealed after delivery.
  - The supply of Goods which are, after delivery, according to their nature, inseparably mixed with other items.

We reserve the right to refuse returns of any merchandise that does not meet the above return conditions in our sole discretion.

## Returning Goods

You are responsible for the cost and risk of returning the Goods to Us. You should send the Goods at the following address:

[ADDRESS]

We cannot be held responsible for Goods damaged or lost in return shipment. Therefore, We recommend an insured and trackable mail service. We are unable to issue a refund without actual receipt of the Goods or proof of received return delivery.

## Gifts

If the Goods were marked as a gift when purchased and then shipped directly to you, You'll receive a gift credit for the value of your return. Once the returned product is received, a gift certificate will be mailed to You.

If the Goods weren't marked as a gift when purchased, or the gift giver had the Order shipped to themselves to give it to You later, We will send the refund to the gift giver.

6. Select **Save**.

New Knowledge Article - Unsaved

English - United States | Proposed

New Process Active for less than one mi... < Author (< 1 Min) Review Publish

Content Summary Analytics

**ARTICLE CONTENT**

Title	* Returns conditions	Description	Conditions for Returns
Keywords	* Gift returns, Condition for Returns, Return Conditions		

**CONTENT**

① Update your origins allow list if any iframe in the article doesn't work or displays error. [Learn more](#).

Designer | HTML | Preview

Conditions for Returns

In order for the Goods to be eligible for a return, please make sure that:

- The Goods were purchased in the last 14 days
- The Goods are in the original packaging
- The following Goods cannot be returned:
  - The supply of Goods made to Your specifications or clearly personalized.
  - The supply of Goods which according to their nature are not suitable to be returned, deteriorate rapidly or where the date of expiry is over.
  - The supply of Goods which are not suitable for return due to health protection or hygiene reasons and were unsealed after delivery.
  - The supply of Goods which are, after delivery, according to their nature, inseparably mixed with other items.

The Business Process flow bar at the top of the form helps you to drive the article towards completeness. You have the option to customize the stages in the Business Process flow to suit your requirements. We will now complete the author stage so it can move into review.

- On the Business process bar, select **Author**. The business step options should pop out below.

## New Knowledge Article - Unsaved

The screenshot shows the 'New Knowledge Article' page. At the top left, there's a red box labeled 'New Process' with the text 'Active for less than one mi...'. To the right, there's a circular progress bar with a red dot at the top, labeled 'Author (< 1 Min)'. On the far right, there's a 'Review' button with a circular icon. Below the header, there are tabs for 'Content' (which is selected), 'Summary', and 'Analytics'. Under 'ARTICLE CONTENT', there are fields for 'Title' (labeled 'Returns conditions') and 'Keywords' (labeled '+ Gift returns, Condition for'). A large red box highlights the 'Author' step, which contains the following fields:

- Set Keywords: \* Gift returns, Condition for
- Article Subject: \* Default Subject
- Assign Primary Author: A dropdown menu with a placeholder 'IA...' and a search icon.
- Mark for Review: \*  Mark Complete

Below the 'Author' step, there's a note: '① Update your origins allow list if any iframe in the article doesn't work or displays error. [Learn more](#)'. At the bottom, there are tabs for 'Designer' (selected), 'HTML', and 'Preview'. The preview area shows the text 'Conditions for Returns' with a standard rich text editor toolbar above it.

- Add the **Article Subject**: Default Subject. This is the subject of the article to help with searches.
- Check the box for **Mark for Review** as Mark Complete.
- In the **Assign Primary Author** drop-down list, you may choose a person who is responsible for maintaining the article content. By default, the user who creates the article is the primary author. For this training, we will keep it as our IAD user.
- Select **Next Stage** to mark the article complete and ready for review.

This screenshot shows the 'Author' step again, with several fields highlighted by a red box:

- Set Keywords: \* Gift returns, Condition for
- Article Subject: \* Default Subject
- Assign Primary Author: A dropdown menu with a placeholder 'IA...' and a search icon.
- Mark for Review: \*  Completed

- The knowledge article is now in the review stage of the business process flow and is ready for review.

The screenshot shows the Microsoft Dynamics 365 Knowledge Article creation interface. At the top, there are standard navigation buttons: Back, Forward, Save, Save & Close, New, New From Template, Add to Queue, Assign, Refresh, Check Access, Process, and a help icon. A yellow banner at the top right provides a note about using the attachments function in the knowledge article editor instead of adding attachments in the notes section.

The main area is titled "Returns conditions - Saved" and "Knowledge Article". A red box highlights the "New Process" status bar, which says "Active for less than one mi...". To the right of the status bar is a circular "Author" icon with a checkmark. Below the status bar, there are tabs: Content (underlined), Summary, Analytics, and Related.

The "ARTICLE CONTENT" section contains fields for Title ("\* Returns conditions") and Keywords ("\* Gift returns, Condition for Returns, Return Conditions").

A red box highlights a modal window titled "Review (< 1 Min)". The modal contains the text "Active for less than one minute" and a "Review" button. At the bottom of the modal is a blue "Next Stage" button with left and right arrows.

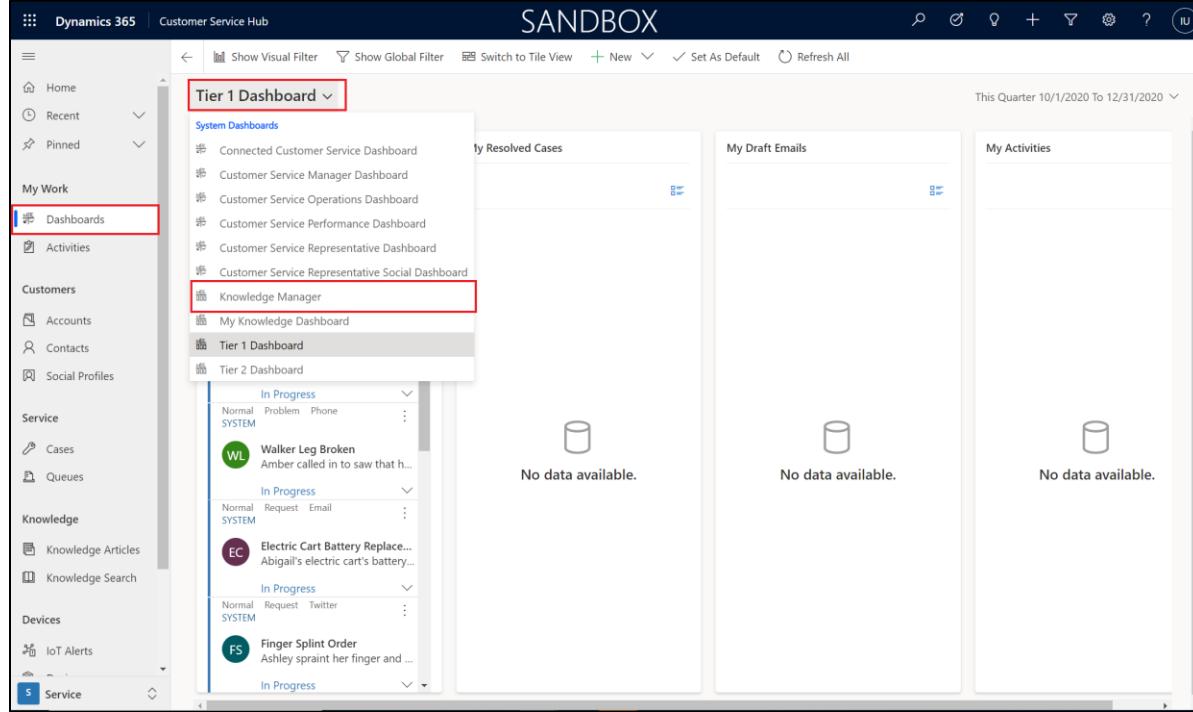
At the bottom right of the main screen, there is a "Attach Files From" dropdown menu.

**Congratulations!** You have successfully created a knowledge article for Returns conditions and marked it for review.

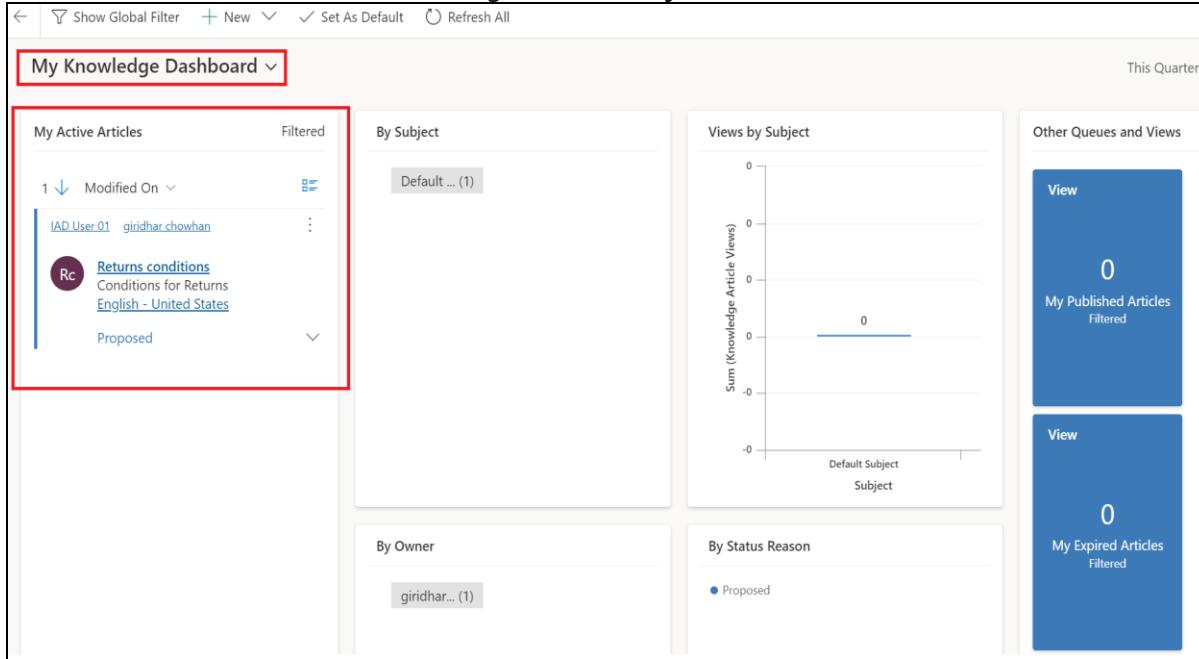
## Task 4: Review and Publish Knowledge Article

To ensure accuracy of the knowledge article, typically someone else would review and approve it. For this training exercise, you will mark the article reviewed and approved yourself. Quick note that this task also requires the Knowledge Manager role or another that can approve knowledge articles.

1. In Customer Service Hub, navigate to **Service > Dashboards** and use the drop-down to choose the **My Knowledge Dashboard**.



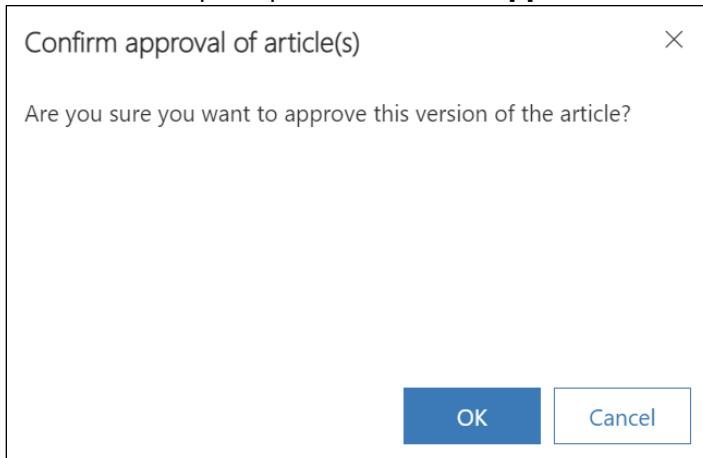
2. Note the **Returns Conditions** knowledge article in **My Active Articles** stream.



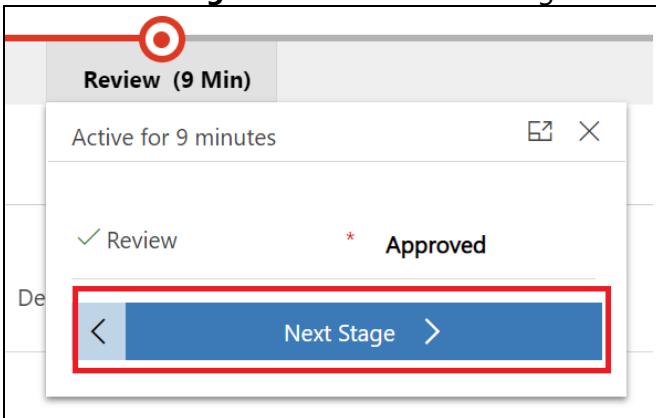
3. Select the **Returns Conditions** knowledge article.
4. On the Business process bar, in the **Review** stage and in the **Review** drop-down, select **Approve**.

The screenshot shows the Microsoft Dynamics 365 Knowledge Article editor. At the top, there are standard navigation buttons: Save, Save & Close, New, New From Template, Add to Queue, Assign, Refresh, Check Access, Process, and a Help icon. A yellow banner at the top right provides a note about sync functionality. Below the banner, the title 'Returns conditions - Saved' and 'Knowledge Article' are displayed. A red bar indicates the process is 'Active for 6 minutes'. The main content area shows 'ARTICLE CONTENT' with a title 'Returns conditions' and keywords 'Gift returns, Condition for Returns, Return Conditions'. To the right, a 'Review (6 Min)' stage is shown with a red circle and a checkmark. A context menu is open over this stage, showing options: 'Review', 'Next Stage', and a dropdown menu with 'Select--', 'Approved' (which is highlighted with a red border), and 'Rejected'. The 'Approved' option is also highlighted with a red border in the menu.

5. Click **OK** when prompted to **Confirm approve article**.



6. Select **Next Stage** to move to Publish stage.



7. You should now be in the **Publish** stage and **Status Reason** should have changed to **Approved**.



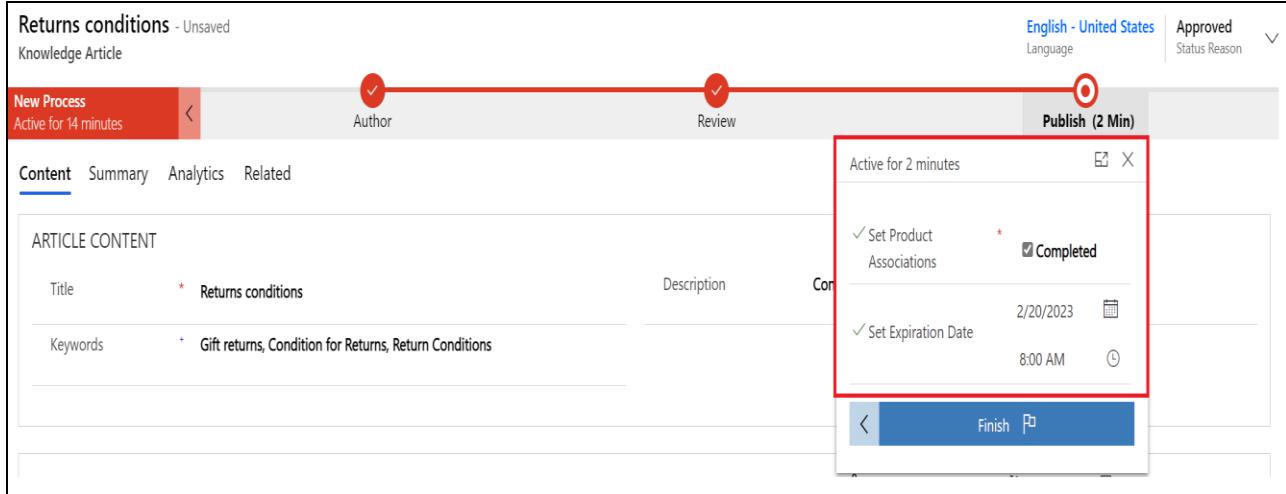
**Congratulations!** You have successfully reviewed and approved the knowledge article. We will show you how to publish the Knowledge Articles to be available during Omnichannel for Customer Service calls.



## Task 5: Publish your Knowledge Article

In this task, you will learn how to publish the knowledge article so it's live and ready to be used.

1. In your **Returns Conditions** Knowledge Article, Select the **Publish** stage.
  - a. For **Set Product Associated** check the box **Completed**.
  - b. Add an **Expiration Date** for one year from now.
  - c. Select **Finish**



2. Once you select Finish, the business process flow should show as completed.
3. Specify the following details (see screenshot below):
  - a. **Publish:** Now
  - b. **Published Status:** Published
  - c. **Expiration State:** Published
  - d. **Expiration Status:** Published
  - e. **Publish approved related translations with Article**, choose Yes.
4. Select **Publish**

Publish

Publishing the article might make the contents available to the public depending on the permissions settings. Confirm these settings before publishing.

Publish	* Now
Published status	* Published
Expiration Date	2/20/2023 
	8:00 AM 
Expiration State	* Published
Expiration Status	* Published
Publish approved related translations with Article	Yes

 Publish 

**Congratulations!** You have successfully reviewed and published the knowledge article. We will see these knowledge articles highlighted in Omnichannel for Customer Service when testing the final escalation.

Repeat Exercise 4 so that as a customer service agent, you can validate the customer information using agent scripts, and guide the customer by viewing Customer's data and knowledge articles.

# Summary

**Nice work!** You have completed **Lab 01 – Seamless Customer Service**.

In this lab, you learned how to do the following:

- Create a Power Virtual Agent chat bot instance, enable the integration between Power Virtual Agent and Dynamics 365 Omnichannel for Customer Service and configure the human agent escalation scenario in Power Virtual Agent.
- Create and configure queues, workstream and chat widget data to route the conversations based on the conditions triggered by the Customer in D365 Commerce e-Commerce portal' chat widget and the chat bot in Power Virtual Agent.
- Create and configure Agent Scripts which will help the Customer Service agent to validate customer information when a conversation is initiated between a customer and a human agent.
- Create knowledge articles that can help a customer agent to address a customer's question about Return conditions during the Omnichannel Customer Service conversation.
- Embed an Omnichannel Chat Widget into a D365 Commerce's e-commerce site page using e-Commerce Site builder so that a customer can view the chat widget page on the e-Commerce Site and chat with a bot or human agent.
- Experience the interaction with PVA bot and hand-off to human agent during escalation scenarios.