



# Microsoft Cloud for Retail in a Day

Lab 01: Seamless Customer Service

Step-by-Step Lab

90 minutes

February 2022

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# 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:

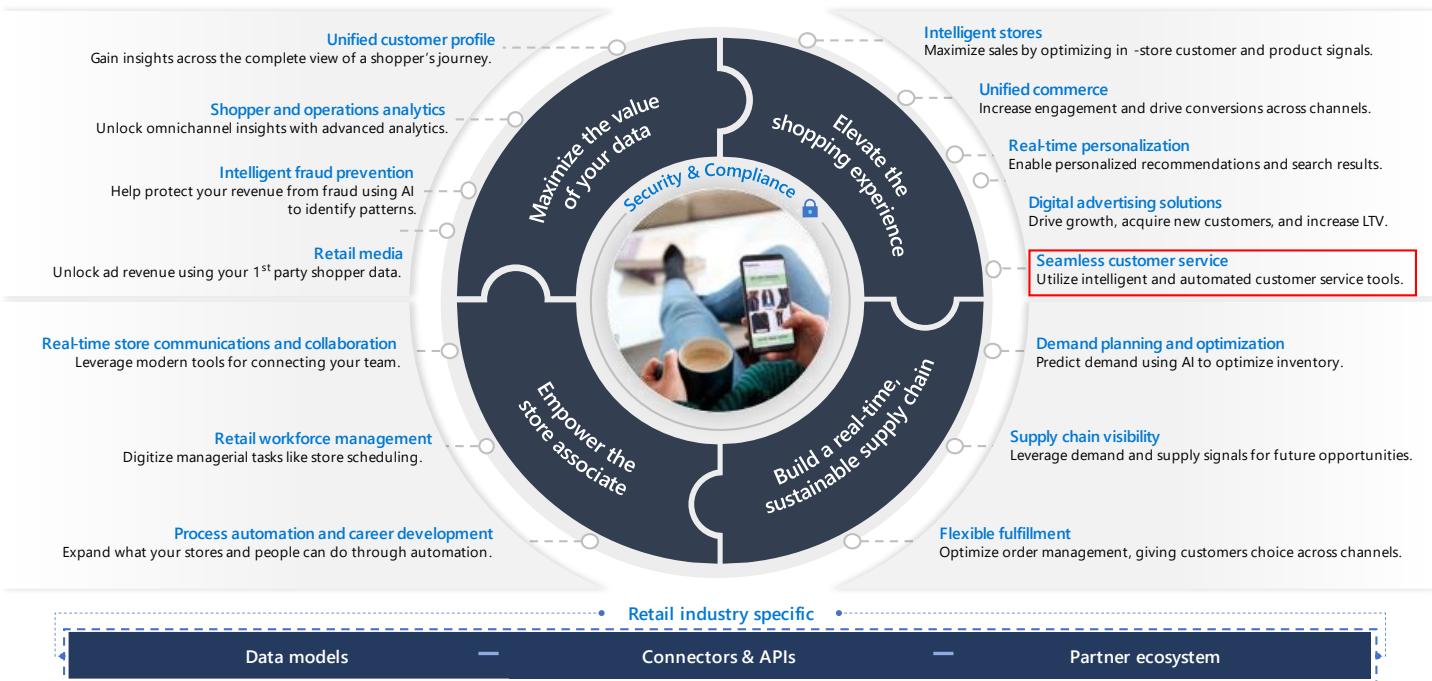
- Tailor customer engagement by providing at-a-glance customer history, and utilize AI to classify, prioritize, and assign customers across all channels to the most qualified agent

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:

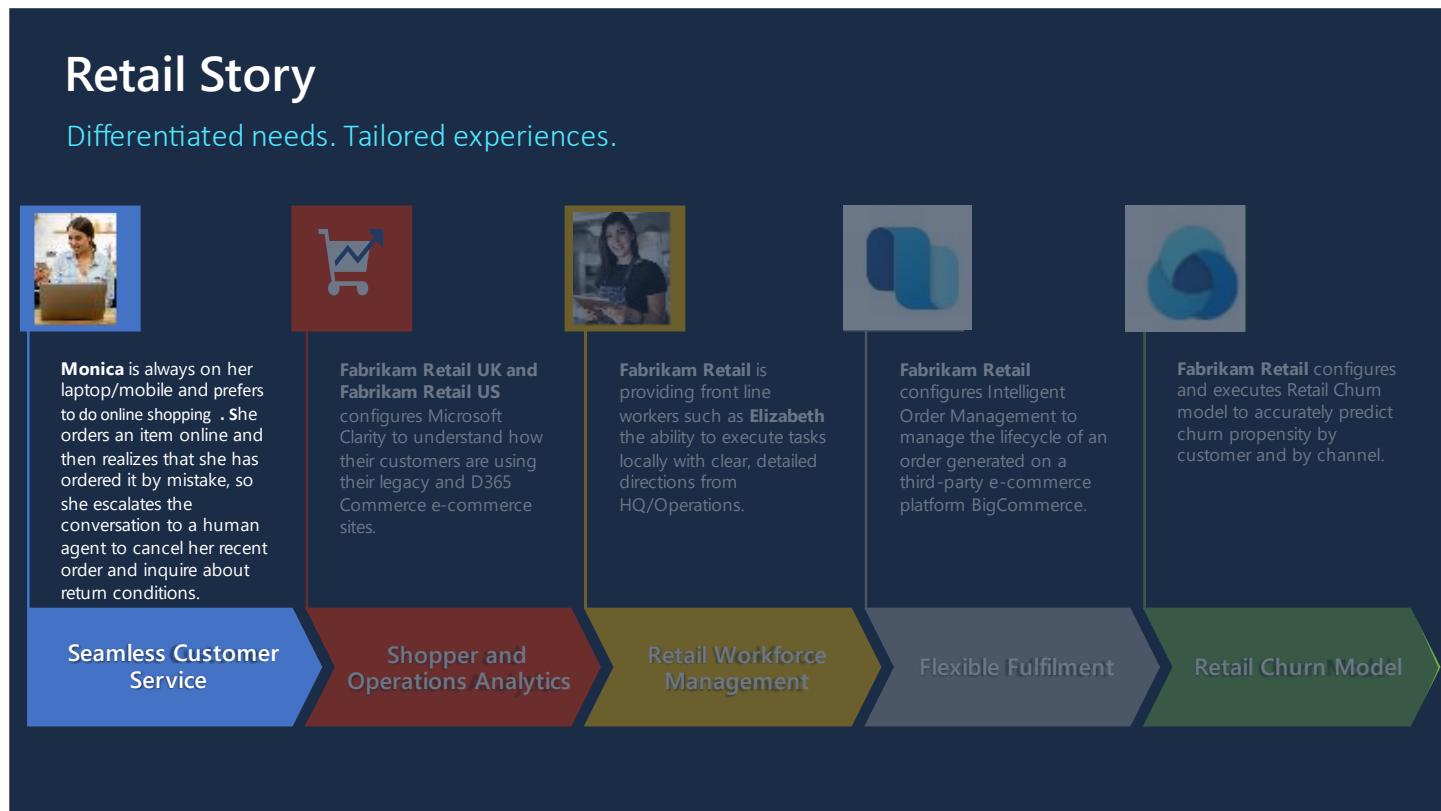
- Provide self-service support with virtual agents, knowledge base portals, and community support forums.



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## 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 Commerce E-commerce site has been setup
- 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:

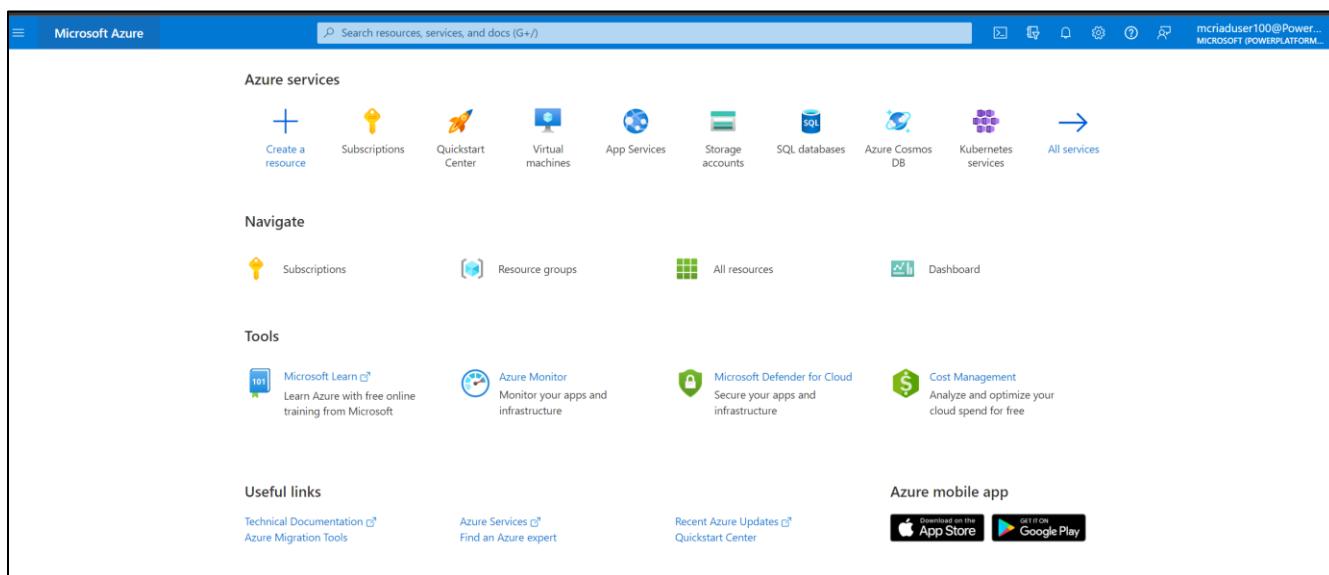
1. Create a Chat bot.
2. Integrate PVA with Omnichannel for Customer Service Instance.
3. Configure hand-off to Omnichannel for Customer Service.
4. Create a Custom Scenario.

## Task 1: Register an application in AAD

In this task, you will learn to create an application registration in AAD which will be used in Task 2 for Power Virtual Agent to connect with D365 Customer Service.

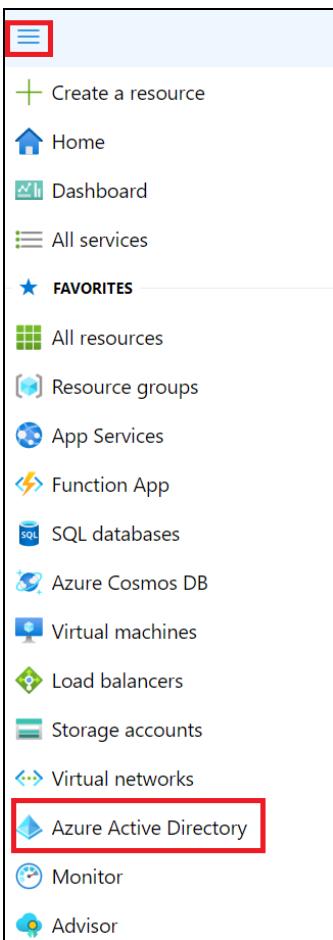
1. While in the In-Private or Incognito window, navigate to <https://portal.azure.com>
2. Sign-in with the credentials provided by your instructor.

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

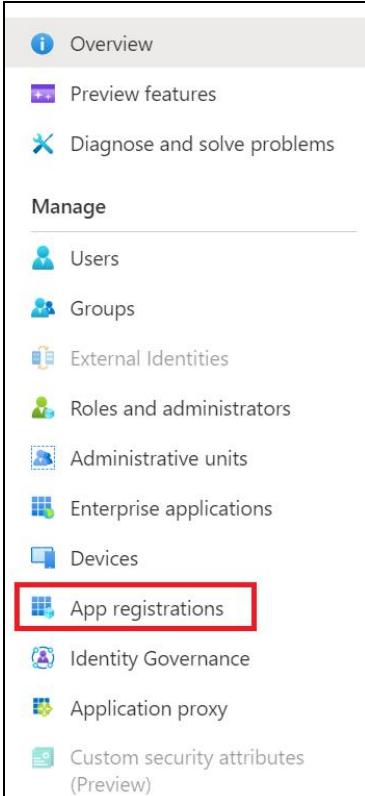


The screenshot shows the Microsoft Azure portal interface. At the top, there's a search bar and a user profile. Below the header, the 'Azure services' section features a 'Create a resource' button and icons for Subscriptions, Quickstart Center, Virtual machines, App Services, Storage accounts, SQL databases, Azure Cosmos DB, Kubernetes services, and All services. Under 'Navigate', there are links for Subscriptions, Resource groups, All resources, and Dashboard. The 'Tools' section includes Microsoft Learn, Azure Monitor, Microsoft Defender for Cloud, and Cost Management. The 'Useful links' section has links to Technical Documentation, Azure Services, Recent Azure Updates, and Azure Migration Tools. The 'Azure mobile app' section shows download links for the App Store and Google Play. The bottom of the page has a footer with links to Support, Feedback, and Help.

3. From the menu on the top left of the screen, select Azure Active Directory.



4. From the Azure Active Directory menu, select App registrations.



5. From the top menu, select the New registration button.

The screenshot shows the Microsoft Azure portal with the URL [https://portal.azure.com/#blade/Microsoft\\_AAD\\_B2B/AppRegistrationsBlade](#). The top navigation bar includes 'Microsoft Azure', a search bar, and a 'Home > Microsoft' breadcrumb. The main title is 'Microsoft | App registrations' under 'Azure Active Directory'. Below the title are navigation links: 'Overview' (selected), 'New registration' (highlighted with a red box), 'Endpoints', 'Troubleshooting', 'Refresh', and 'Download'. The 'New registration' link is located at the top right of the main content area.

6. Enter a unique name for your app such as "**MRIAD <<User Number>> <<MMDD>> Bot**". Remember the name of your App as you would it to identify it in the later exercises in this lab.

The screenshot shows the 'Register an application' form in the Microsoft Azure portal. The title is 'Register an application'. The 'Name' field is filled with 'MRIAD100 0315 Bot' and has a green checkmark icon. The 'Supported account types' section shows the 'Accounts in this organizational directory only (Microsoft only - Single tenant)' option selected. Below it are other options: 'Accounts in any organizational directory (Any Azure AD directory - Multitenant)', 'Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)', and 'Personal Microsoft accounts only'. A 'Help me choose...' link is present. The 'Redirect URI (optional)' section contains a dropdown menu set to 'Select a platform' and a text input field with 'e.g. https://example.com/auth'. At the bottom, there is a note about integrating apps from outside the organization and a link to 'Enterprise applications'. A checkbox for accepting 'Microsoft Platform Policies' is checked. The 'Register' button is highlighted with a red box.

7. Select **Register**.

The system will be creating an Application in the background.

8. Copy and save the Application (client) ID as you would need it in Task 3 of this exercise.

The screenshot shows the Microsoft Azure portal interface. At the top, there's a navigation bar with 'Home > Microsoft' and a search bar. Below that is a card for the application 'MCRIAD100 0315 Bot'. The card has a 'Delete' button, an 'Endpoints' button, and a 'Preview features' button. On the left, there's a sidebar with 'Overview' (selected), 'Quickstart', 'Integration assistant', 'Manage' (with 'Branding & properties', 'Authentication', 'Certificates & secrets', and 'Token configuration' options), and a feedback message: 'Got a second? We would love your feedback on Microsoft identity platform (previously Azure A...)'.

Essentials	
Display name	: <a href="#">MCRIAD100 0315 Bot</a>
Application (client) ID	: ec80[REDACTED]226
Object ID	: [REDACTED]
Directory (tenant) ID	: [REDACTED]
Supported account types	: <a href="#">My organization only</a>

**Congratulations!** You have successfully created an Application in AAD.

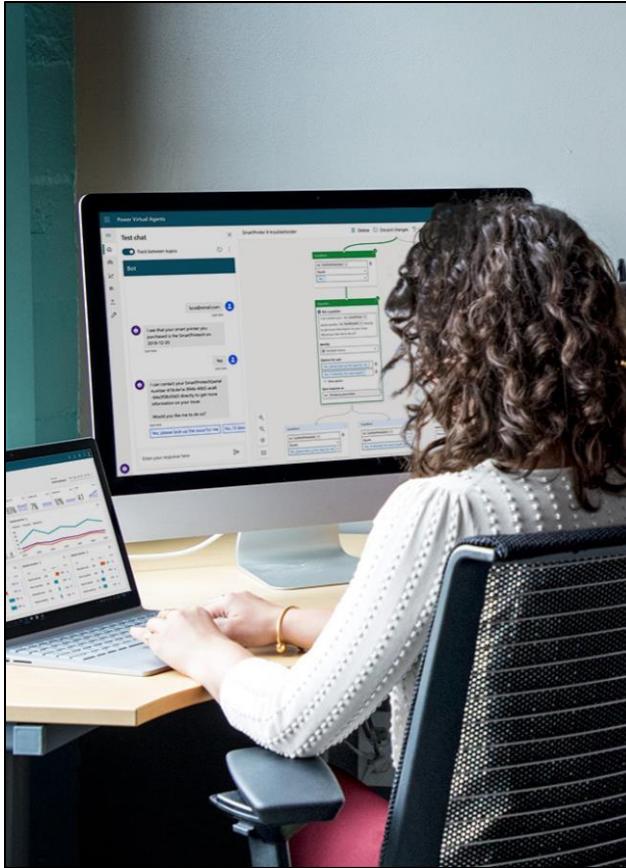
## Task 2: Create a Chat bot

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.powerbi.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 "IADUser <>UserNumber>> 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.



**Create a chatbot**

Name your bot\*  
IADUser01 Commerce Bot

What language will your bot speak?\* ⓘ  
English (US)

Select an environment\* ⓘ  
mcriad - United States

Signed in as IADUser01@PowerPlatformOpenHac... [Sign out](#) [Create](#)

- 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.

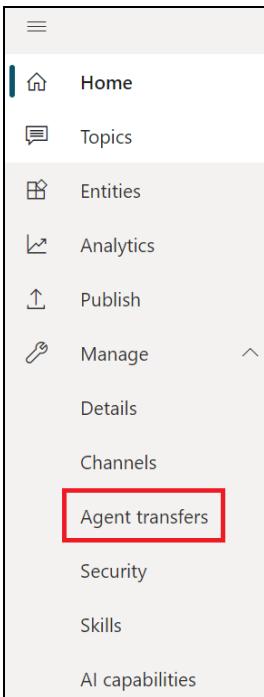
**Pro Tip:** If you've created a bot in this environment before, to create another bot select the robot icon  on the navigation bar, and then select *New bot*.

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

### Task 3: Integrate PVA and Omnichannel for Customer Service

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

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



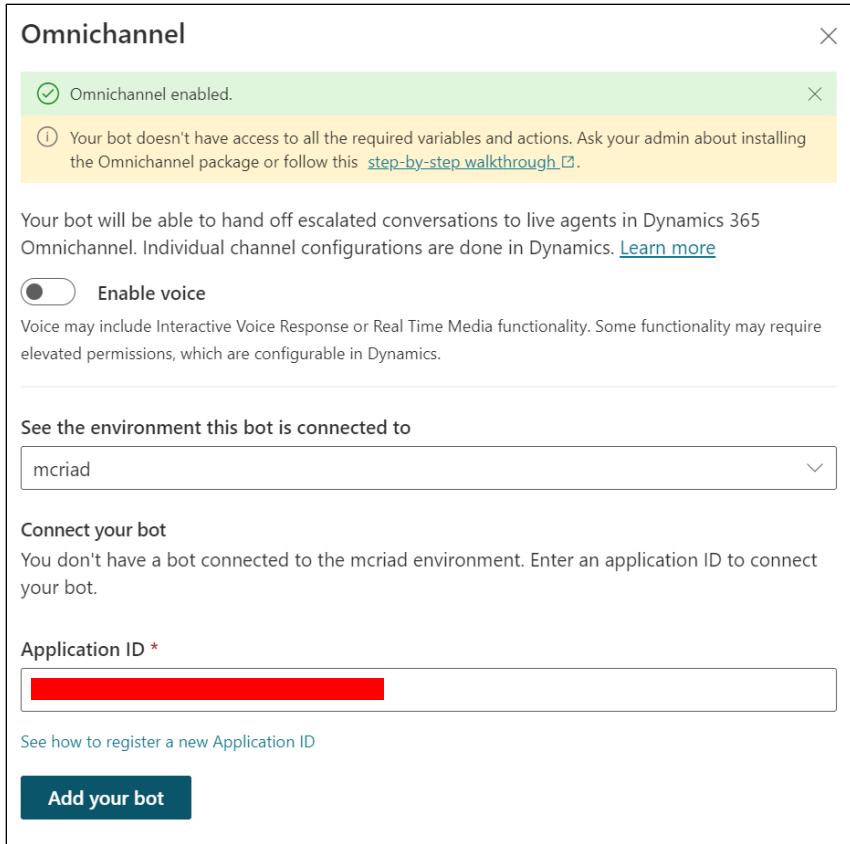
2. Select the **Omnichannel** tile.

The screenshot shows the 'Agent transfers' configuration page. It includes a heading 'Agent transfers', a sub-instruction 'Connect to a customer engagement app to enable your bot to hand off a chat session to a live agent or other bot.', a link 'Learn more', and a question 'How would you like the bot to hand off chat sessions?'. There are two options: 'Omnichannel' (represented by a purple heart icon) and 'A custom engagement hub' (represented by a blue icon of a person inside a house). The 'Omnichannel' option is highlighted with a red box.

3. Select **Enable**.



4. Paste the application ID of the Application registration **created in Task 1** 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:** You will see a warning – “Your bot doesn't have access to all the required variables and actions. Ask you admin about installing the Omnichannel package or follow this step-by-step walkthrough.” You can ignore this warning for now.

**Omnichannel**

Omnichannel enabled. X

Your bot successfully added. X

i Your bot doesn't have access to all the required variables and actions. Ask your admin about installing the Omnichannel package or follow this [step-by-step walkthrough](#).

Your bot will be able to hand off escalated conversations to live agents in Dynamics 365 Omnichannel. Individual channel configurations are done in Dynamics. [Learn more](#)

**Enable voice**

Voice may include Interactive Voice Response or Real Time Media functionality. Some functionality may require elevated permissions, which are configurable in Dynamics.

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**See the environment this bot is connected to**

mcriad

**Connected bot**

i You need to take action before you can enable voice. Learn more about the set-up for voice in this [step-by-step walkthrough](#)

Commerce Bot

[View details in Omnichannel](#)

[Disconnect bot](#)

[Refresh](#)

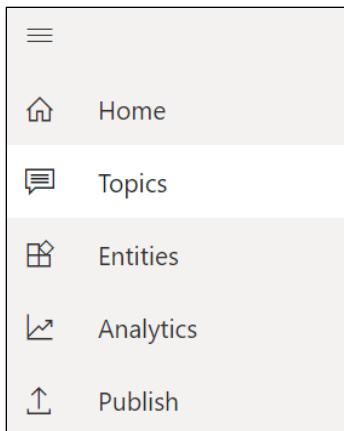
5. Close the Omnichannel form by selecting **X** on the top right edge of the form.

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

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

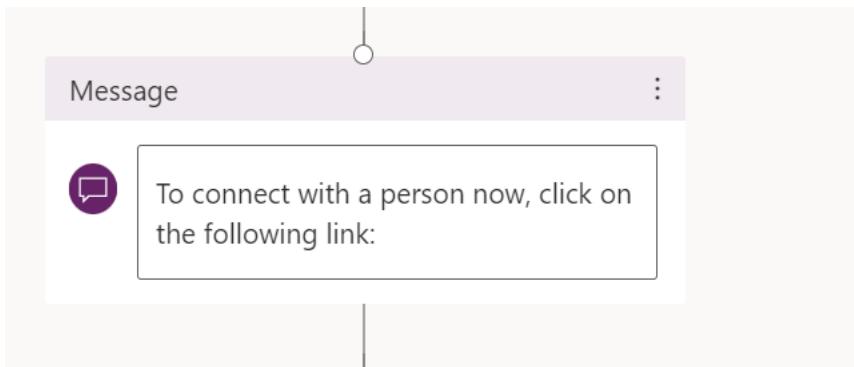
3. Select **Go to authoring canvas**.

**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.

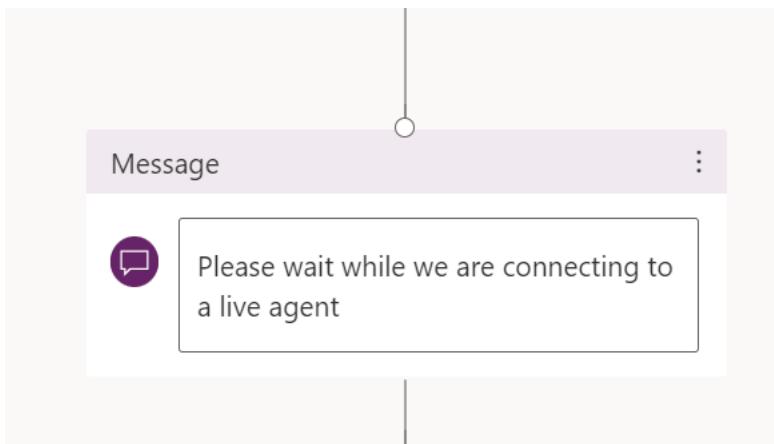
The screenshot shows the 'Escalate' setup page. The 'Setup' tab is selected. The 'Name' field contains 'Escalate'. The 'Friendly name' field contains '(1)' and the 'Description' field contains 'System Intent Escalate'. In the 'Trigger phrases (65)' section, it says 'For system topics, trigger phrases can't be edited.' Below this, there are four trigger phrases: 'Talk to agent', 'Talk to a person', 'Talk to someone', and 'Call back'. On the right side, there is a 'Modified by' field with '01/15/2019' and a 'Status' field with a dash. A red box highlights the 'Go to authoring canvas' button, which has a gear icon and the text 'Go to authoring canvas'.

4. Change the statement in the message node to "Please wait while we are connecting to a live agent"

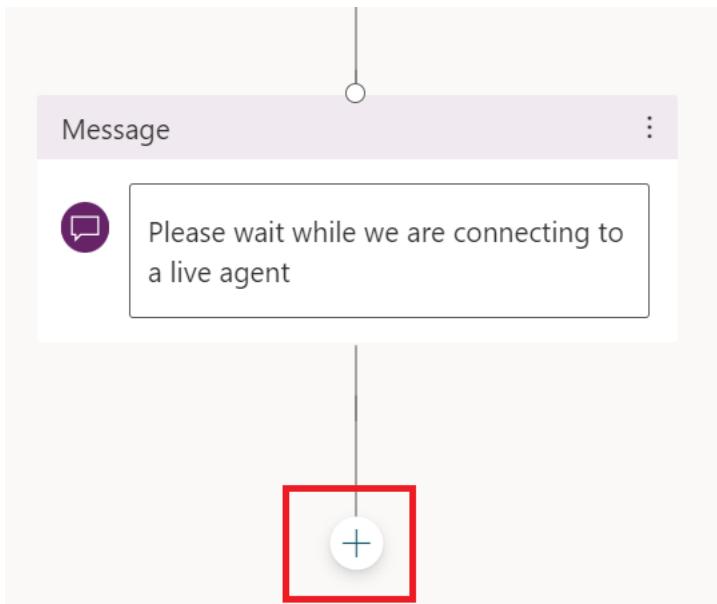
#### Original statement



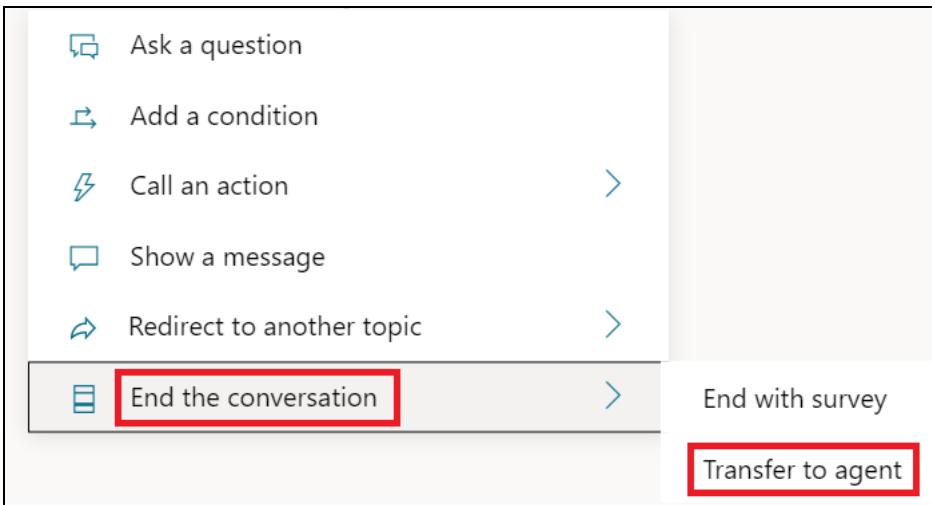
#### Updated Statement



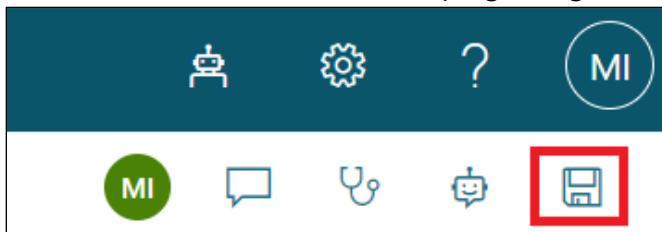
5. Select plus(+) icon to add a new node.



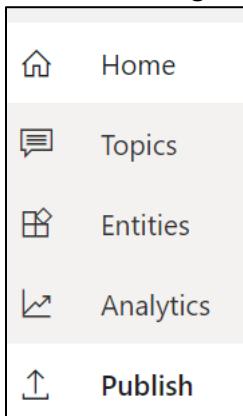
6. Select **End the conversation** and then select **Transfer to agent**.



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



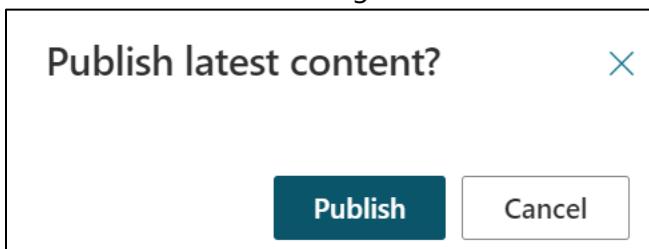
8. Once the changes have been saved, Select **Publish** on the left pane.



9. Select **Publish** button



10. 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

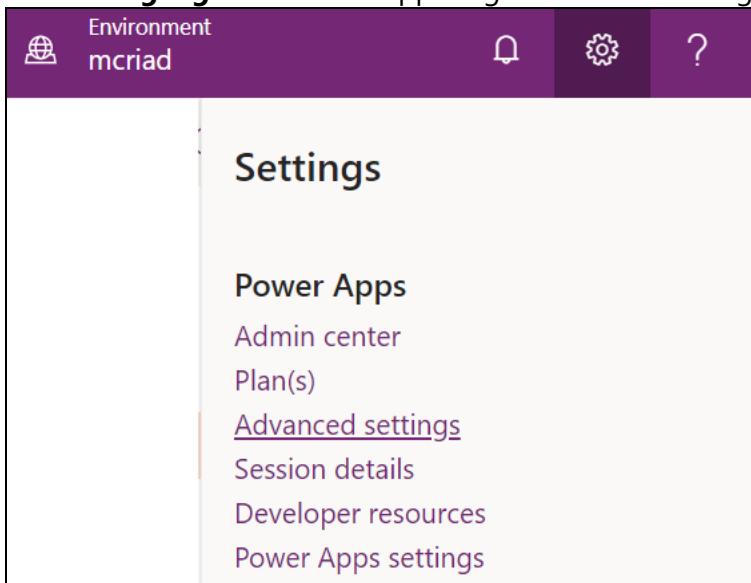
In this task, you will learn to assign an omnichannel agent security role to a human agent.

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 on second attempt.

The screenshot shows the Dynamics 365 Business Management interface. At the top, there is a yellow banner with the text "Sandbox" and a message about security settings being deprecated. Below the banner, the title "Business Management" is displayed. A section titled "Which feature would you like to work with?" lists several options with icons and descriptions:

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

- 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.

The screenshot shows the Dynamics 365 Settings menu. The top navigation bar includes "Dynamics 365", "Settings", and "Business Management". The "Settings" menu is expanded, showing three main categories: "Business", "Customization", and "System". The "System" category contains several options, with "Security" highlighted by a gray background and white border.

Business	Customization	System
Business Management	Customizations	Administration
Templates	Solutions	Security
Product Catalog	Microsoft AppSource	Data Management
Service Management	Plug-In Trace Log	System Jobs
Sync Error	Solutions History	Document Management

- Under Security, select **Users**.

## Security

### Which feature would you like to work with?



#### Users

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 'System Views' section, there is a list of user categories. The 'Enabled Users' option is highlighted with a light blue background, while the other options are white. The list includes: @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.

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

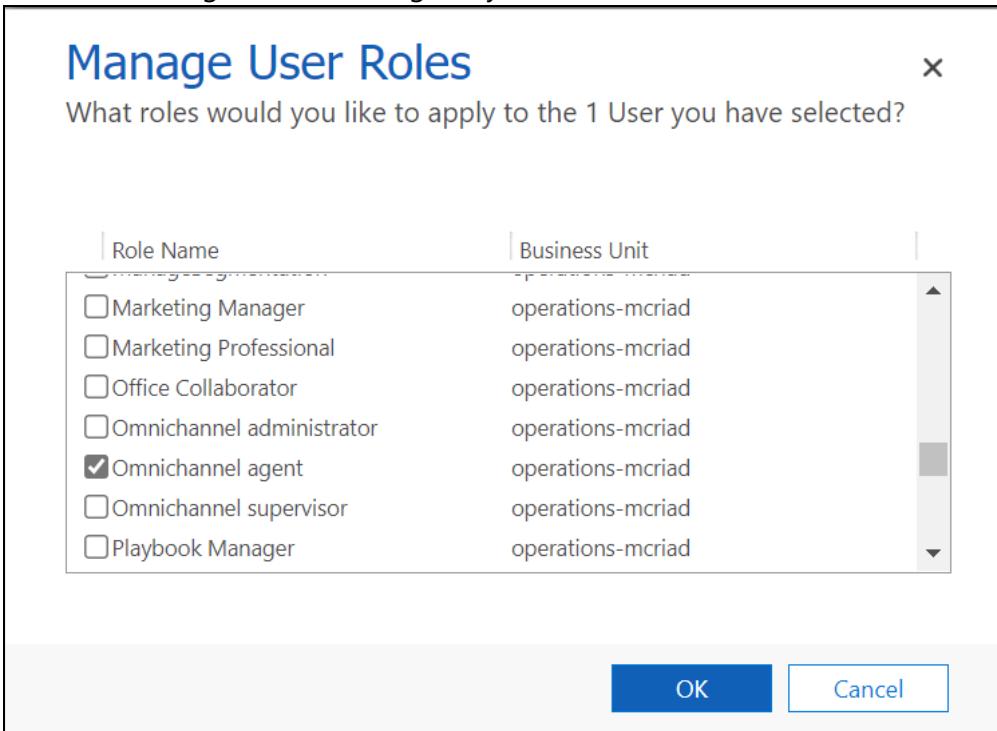
*Note: If you are in an official training, search for your assigned user – IAD User [x]*

The screenshot shows a grid view titled 'Search Results'. A 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'. There is one visible row for 'IAD User 01' with the email 'IADUser01@PowerPlatformOp...'. The bottom right corner of the grid has a 'Charts' button.

9. 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 are navigation links: NEW, EDIT, APPROVE EMAIL, REJECT EMAIL, PROMOTE TO ADMIN, MANAGE ROLES (which is selected), and CHANGE BUSINESS UNIT. Below this is a search bar labeled "Search Results". A table displays user information with columns: Full Name (sorted by name), Position, Main Phone, Business Unit, and Site. One row is visible, showing "IAD User 01" under "Full Name".

10. Verify if **Omnichannel Agent** role is assigned to your user. If it isn't assigned, then select the Omnichannel Agent role to assign to your user and then select **OK**.

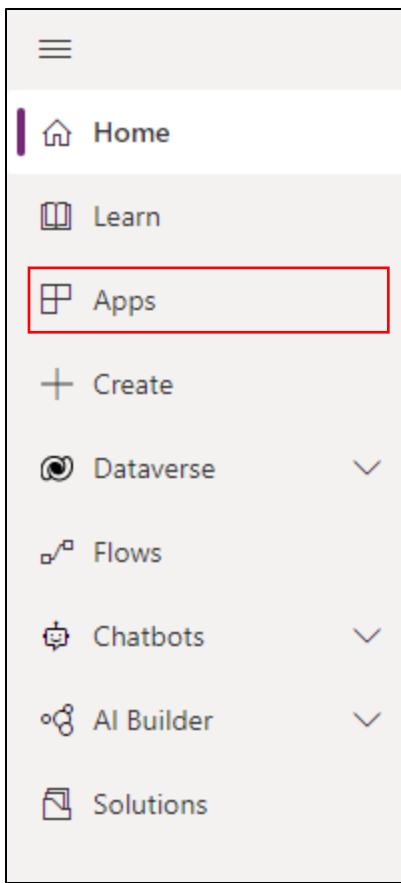


**Congratulations!** You assigned the proper omnichannel agent role to your user to allow you to be a live agent in omnichannel.

## 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>, Select on Apps on Left Navigation Bar



2. Open the **Omnichannel admin center** app.

The screenshot shows the Microsoft Power Apps portal. On the left, there's a navigation sidebar with 'Home', 'Learn', 'Create', 'Data', 'Flows', 'Chatbots', 'AI Builder', and 'Solutions'. The 'Create' section is expanded. In the main area, there are two tabs: 'Apps' (which is selected) and 'Component libraries (preview)'. A warning message says '1 environment variable needs to be updated. See environment variable'. Below this, a list of apps is shown with icons and names. The 'Omnichannel admin center' app is highlighted with a red border.

Name
Customer Service admin center (preview)
Omnichannel Administration
Sales Hub
Intelligent Order Management
Omnichannel for Customer Service
Customer Service workspace
<b>Omnichannel admin center</b>
Customer Service Hub
Channel Integration Framework

3. On the Homepage select **Create a queue**.

The screenshot shows the Dynamics 365 Omnichannel admin center homepage. The left sidebar includes 'General settings', 'Home', 'Users', 'Queues', 'Workstreams', 'Channels', 'Record routing', 'Advanced settings', 'User attributes', 'Agent experience', 'Customer settings', 'Supervisor settings', 'Diagnostics', and 'Insights'. The main content area has sections for 'Welcome to Omnichannel for Customer Service', 'Try out live chat with this demo', 'Workstreams' (with a 'Create a workstream' button), 'Queues' (with a 'Create a queue' button highlighted by a red box), and 'Learn more' links for both sections.

4. Create a new Queue with the following details:

- Name:** <<UserName>> "Escalate To Human"
- Type:** Messaging
- Group number:** <<user number>> example:80
- Click Create.**

## Create a queue

X

Queues are used to collect and distribute work among agents. Within queues, you can add users, set an assignment method, and add operation hours. [Learn more](#)

Name \*

MCRiadUser80 Escalate To Human

Type \*

Messaging

Group number \* ⓘ

80

Owner

mcr iaduser80

Create

5. 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.

### 6. Add user to the queue

MCRiadUser80 Escalate To Human <a href="#">Edit</a>		Messaging	mcr iaduser80	
		Type	Owner	
Users				
Name ↑	Role	Capacity profile	Capacity	Business unit

7. Search for your user name and add it to the queue

### Add Users

Choose which agents can be assigned work items from this queue. [Learn more](#)

mcr iaduser80

Name ↑	Role	Capacity profile	Capacity	Business unit
mcr iaduser80	Agent			operations-mcriad

8. The user is now added to the queue as **agent**

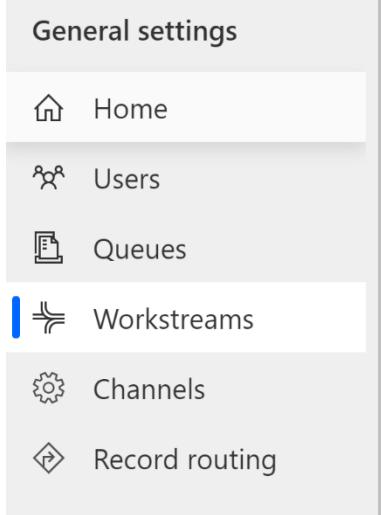
Users	Search		See more	Add users
Name ↑	Role	Capacity profile	Capacity	Business unit
mcr iaduser80	Agent			operations-mcriad

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

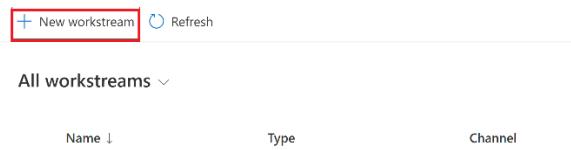
### Task 3: Create a Live Work Stream with Context Variables and Routing Rules

In this task, we will set up basic chat routing. This will allow 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 which only contains the bot user (agent).
  - **Human Routing Rule:** When user chooses to “Talk to an agent”, 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 workstream** to create a new workstream.



3. Enter the following details in the workstream below:
  - a. **Name:** <<UserName>> “Chat Workstream”
  - b. **Type :** Messaging
  - c. **Channel:** Chat

## Create a workstream

A workstream is a collection of settings, including channel set up, routing rules, work distribution, and bots. Your workstream settings will be used to route customers to the right queues and agents. [Learn more](#)

Name \*

MCRiadUser80 Chat Workstream

Owner

mcr iaduser80

Type \*

Messaging

Channel \*

Chat

4. Choose the work distribution mode as "**Push**" and **create** the Workstream

### Work distribution mode

Push

Incoming conversations will be assigned to agents automatically based on capacity and presence. You can also allow picking of open work items that go unassigned.

Pick

Incoming conversations will go to the open work items section of the agent dashboard. Agents will pick the conversations they work on.

5. In the workstream created, it is required to setup **Chat channel** by clicking **Set up chat**

MCRiadUser80 Chat Workstream [Edit](#)

Chat

Channel

Messaging

Type

mcr iaduser80

Owner

Live chat \* Required

### Set up your chat channel

We'll guide you through each step of the process. When you're done, the settings you've turned on will show up here. [Learn more](#)

[Set up chat](#)

6. Setup a **Live Chat** pop-up opens as below

**Name:** <<user name>> Chat widget

**Language :** English-United states

## Live chat setup

Channel details

Chat widget

Behaviors

User features

Review and finish

Success

**Channel details**

Name \*

Language \*

Type \*

Channel \*

### 7. Enable Proactive chat

#### Live chat setup

Channel details

Chat widget

Behaviors

User features

Review and finish

Success

Subtitle

Theme color \*

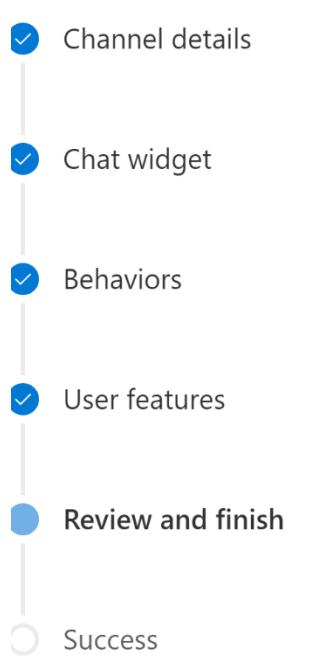
Logo URL \*

Agent display name

Widget position \*

Proactive chat   On

### 8. Click **Next** and continue through the steps to review and **Create channel**



## Review and finish

### Channel Details

Name: MCRIADUser80 Chat Widget  
Language: English - United States

### Chat Widget

Chat title: Let's chat  
Chat subtitle: We're Online  
Chat color: Blue  
Logo URL: <https://oc-cdn-ocprod.azureedge.net/livechatwidget/scripts/LiveChatBootstrapper.js>  
Proactive chat: Enabled

Back

Create channel

9. Make sure to copy the script of the chat widget and save it as it will be required in the next exercise later

### Chat Channel Created

We have successfully created your chat channel

#### What's Next?

Now that your channel has been setup, you can now look at the following next steps

#### Add Widget To Your Website

Copy and paste this snippet to add your chat widget to any webpage. You can get this snippet anytime from your chat ch

```
<script id="Microsoft_Omnichannel_LCWidget" src="https://oc-cdn-ocprod.azureedge.net/livechatwidget/scripts/LiveChatBootstrapper.js" data-app-id="ca4e2a99-6467-4a30-99d8-9efdd37cd488" data-lcw-version="prod" data-org-id="e103e9eb-cebc-4840-912e-3c8cf4e60a9f" data-org-url="https://unqe103e9ebcebc4840912e3c8cf4e60-crm.omnichannelengagementhub.com"></script>
```

 Copy

10. In your **chat workstream** record, scroll down to select **Advanced settings > Add a Context variable** to create context variables

## Advanced settings

### Sessions

#### Default

##### Chat session - default

This determines which tabs to display when the agent begins a new session, and which scripts will be used.

### Context variables

#### Add a context variable

Add custom context that can be used to define routing

[Learn more](#)

 Add context variable

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

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

#### Add context variable



Name \*

va\_Scope

Type \*

Text



12. Click **Save and Close**.

13. Again in the your **chat workstream** record, select the **Add Context Variables** tab.

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

- a. **Name:** Email
- b. **Type:** Text

## Add context variable X

Name \*

Type \*

 ▼

15. Click **Save and Close**.

16. Again in your **chat workstream** record, select the Add **Context Variables** tab.

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

- a. **Name:** msdyn\_CustomerId
- b. **Type:** Text

## Add context variable X

Name \*

Type \*

 ▼

18. Click **Save and Close**.

19. In the **chat workstream** record, select the **Context Variables** tab and add.

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

- a. **Name:** msdyn\_CustomerName
- b. **Type:** Text

## Add context variable

Name \*

Type \*

21. Click **Save and Close**.

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

Context variables		 Edit
Name	Type	
msdyn_customername	Text	
msdyn_CustomerId	Text	
va_Scope	Text	
Email	Text	

4 of 4

23. Now we will create Routing Rules to direct the incoming chat requests to Queue.

24. Scroll to the **Routing Rules** tab in the workstream, Click **Create ruleset** under **Route to queues**

Routing rules [Learn more](#)

 Work classification (optional)  
Add detailed information to incoming work items with classification rules. This allows for more precise routing and assignment. [Learn more](#)

 Route to queues  
Create rules to send incoming work items to the right queues. If no rules are created or no rules match, incoming work will be sent to the default queue. [Learn more](#)

 Create ruleset

 Create ruleset

25. Create route-to-queues ruleset

**Name** : Human agent

**Description** : Escalate to human agent

## Create route-to-queues ruleset

X

After you name this ruleset, you can start creating rules.

Name \*

Human Agent

Description

Escalate to human agent

[Learn more](#)

**Create**

**Cancel**

### 26. Create a **route to queue Rule**



**Create a route to queue rule**

**+ Create rule**

### 27. Create rule condition , choose "**Add related entity**"

**Rule name :** Human agent rule

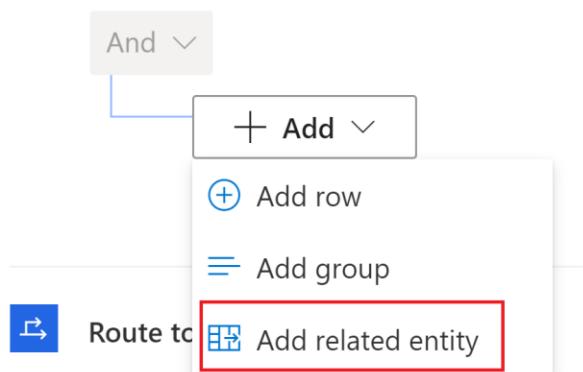
Rule Name \*

Human agent rule

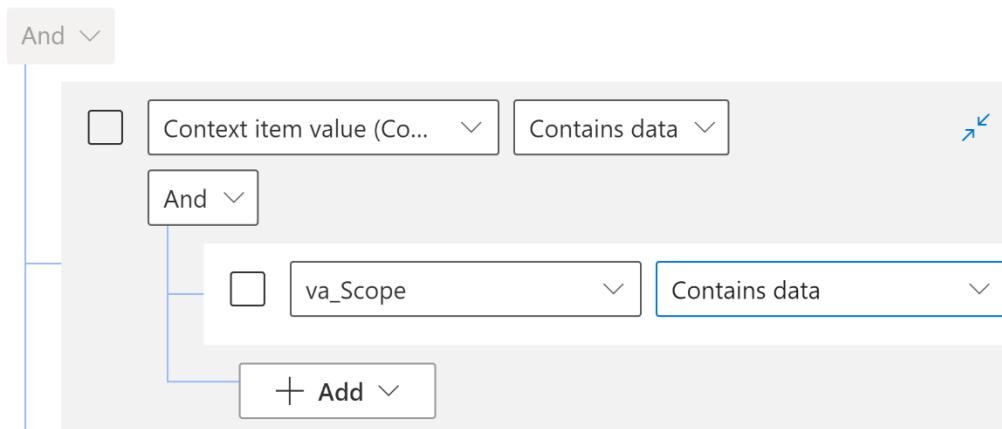
#### 🔗 Root record: Conversation

Root record is the starting record for the conditions and t

#### ↳ Conditions



28. Configure rule condition , choose **Context item value** and **Contains data**. In the inline condition choose **va\_Scope** and value as **Contains data**  
Conditions



29. Choose Route to queue name as "<<Username>> Escalate to Human " queue created in task 2 -point 4

#### ↳ Route to queues

MCRIADUser80 Escalate To Human \*

30. Once configured the rule set is shown as below



## Route to queues

Create rules to send incoming work items to the right queues. If no rules are created or no rules match, incor

Ruleset name	Type	Description
Human Agent	Manual - Decision list	Escalate to human agent

31. Click on left arrow to go back to the workstream.

Route to queues  
← MCR Fabrikam Demo Escalate to Human [Edit](#)

32. Next step would be to configure a Bot to the chat workstream. Click “**Add Bot**” under **Advanced settings >Bot** section of the workstream.

**Bot** Optional

### Add a bot

All incoming work will be routed to the bot first. If needed, your bot will transfer customers to the right queues to speak with human agents.

[Learn more](#)

+ Add bot

33. In the Bot **Name** field ,Choose the Power virtual agent queue created in Task 2.

**Add a bot**



When you save, we'll send all incoming work to this bot first. [Learn more](#)

**Name \***

Virtual Agent MCRIAD80 0401 Bot



[Edit in power virtual agents](#)

**Bot type**

Power Virtual Agents

**Description**

---

**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 Bot. These all work together and allow customers to chat with a virtual 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](#)

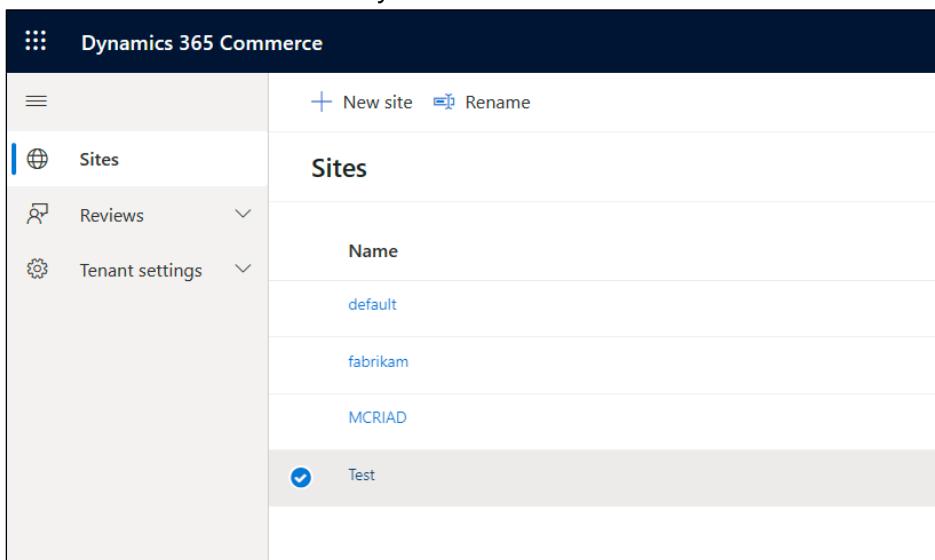
## Task 1: Create a site page

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.

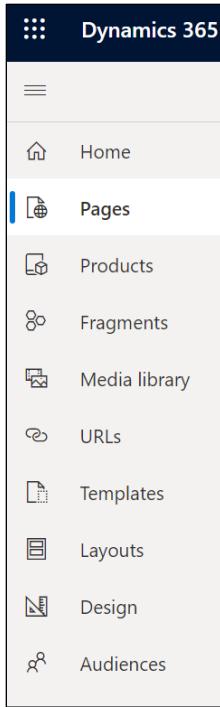
*Note: If you are in instructor led training. Use the URL provided under the Environment Name of "D365 Commerce Site Builder:" and credentials provided by your instructor in the training information document.*

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 the bar, there is a header with a grid icon, "Sites", "New site", and "Rename" buttons. On the left, a sidebar menu includes "Sites" (selected), "Reviews", and "Tenant settings". The main content area is titled "Sites" and lists sites with columns for "Name" and a "Selected" checkbox. The sites listed are "default", "fabrikam", "MCRiad", and "Test" (which is selected).

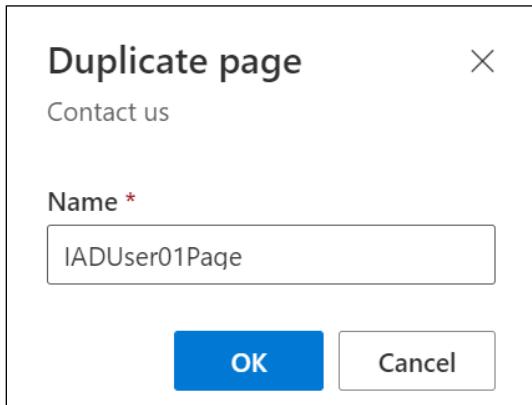
3. Select **Pages** on the left navigation bar.



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

A screenshot of the Dynamics 365 Commerce Pages grid. The grid has columns for Name and Publish status. One row is selected, showing the page name "Contact us" and publish status "Published · Pending changes". The top navigation bar includes New, Publish, Unpublish, Delete, Duplicate, and Dependencies buttons.

5. Provide a unique name for the page. For Ex: <<UserName>>Page and Select **OK** button. Remember the page name because you will be making changes to the same page in Lab 02 (Microsoft Clarity).



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

The screenshot shows the Dynamics 365 Commerce interface. On the left, there's a navigation pane with icons for Home, Pages (selected), Products, and Fragments. The main area is titled 'Pages' with a sub-label '(i) 32 results'. It has a search bar labeled 'Name' and a list of pages. One page, 'IADUser01Page', is highlighted in blue.

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

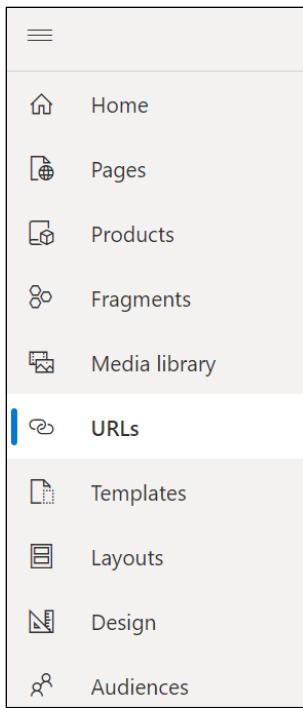
This screenshot shows the same Dynamics 365 Commerce interface as the previous one, but with a red box highlighting the 'Publish' button in the top right command bar. The list of pages remains the same, with 'IADUser01Page' still selected.

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

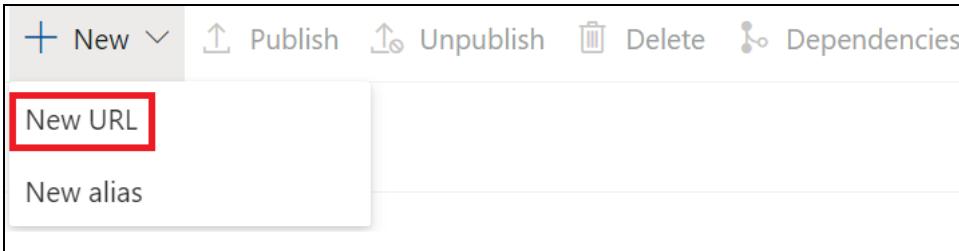
## Task 2: Create and Publish URL

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 (Eg: IADUser<<Number>>Page) 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

X

### URL path

IADUser01Page

### URL preview

www.contoso.com/IADUser01Page

What are you creating a URL for?

Internal page

Direct URL link to a page within your site

Media library document

Direct link to a document within your site

Internal URL redirect

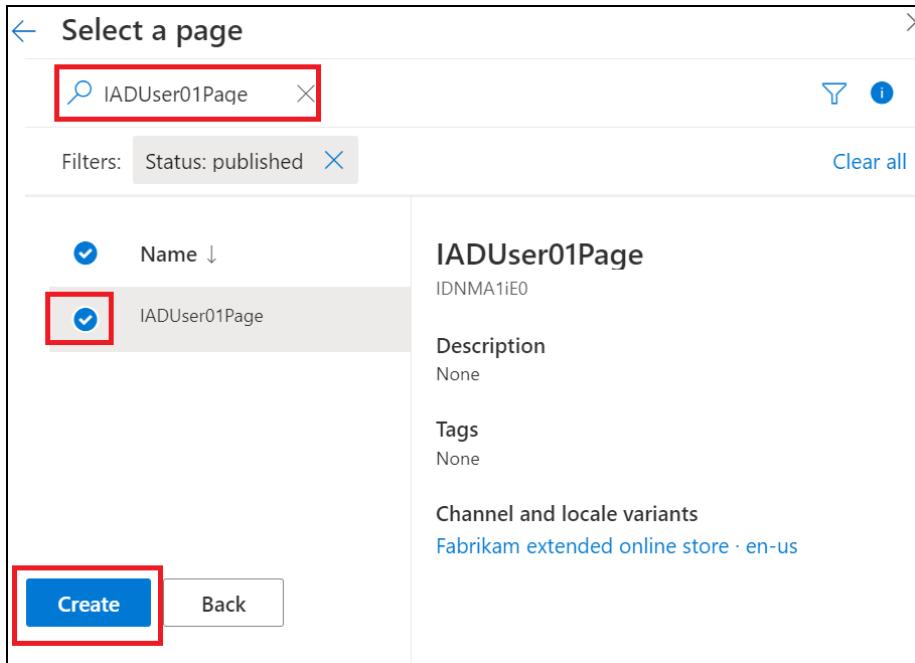
URL redirect to another URL within your site

External page

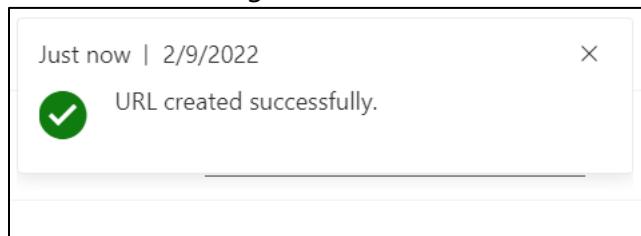
URL redirect to another URL outside your site

Next

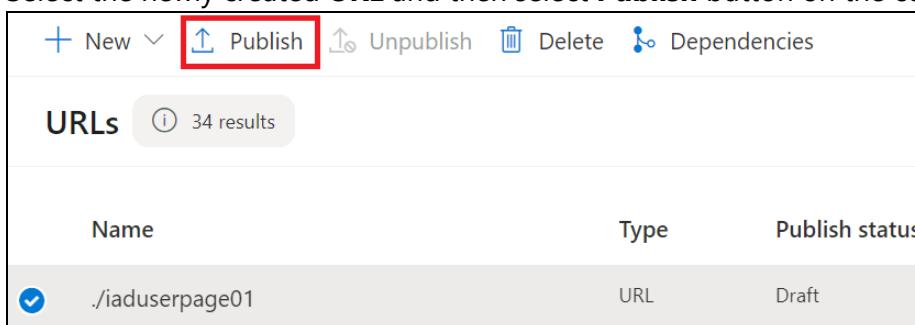
4. Search for the page created in Task 1 (For Ex: IADUser01Page) and select your page then select **Create** button.



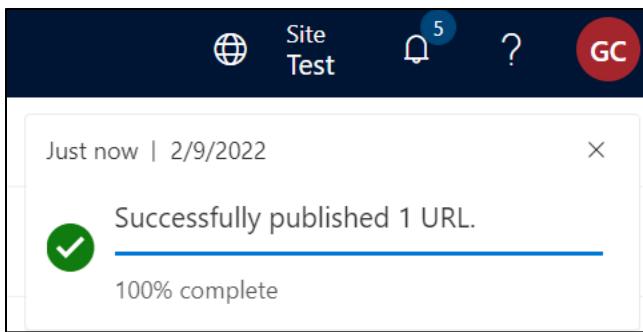
5. If the URL is successfully generated, you will see a notification on the top right edge of the browser with a successful message.



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



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

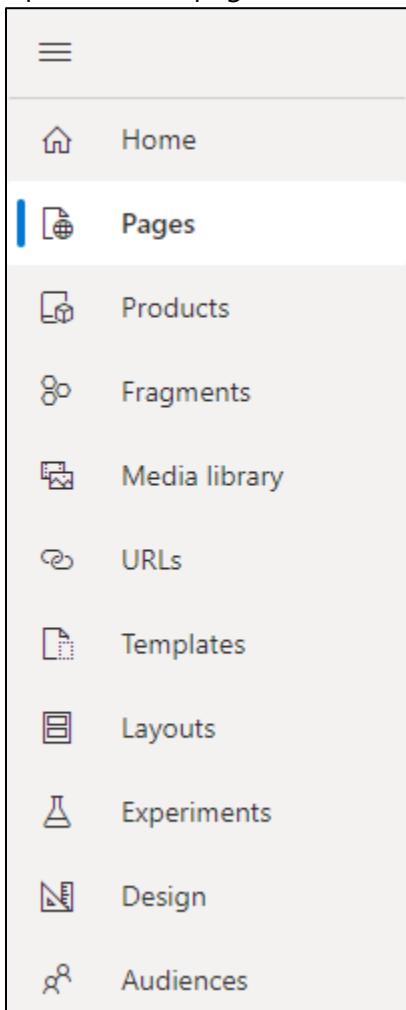


**Congratulations!** You have successfully created a URL and published it.

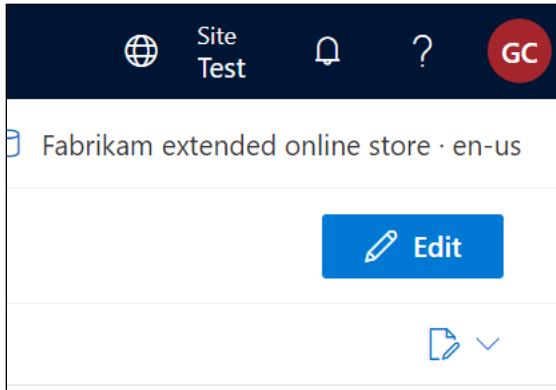
### Task 3: Embed a Chat Widget into an e-Commerce Site Page

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. Click on Pages in Left Navigation Bar



2. Click on the Page and Open it.
3. Select **Edit** on the top right edge of the page.



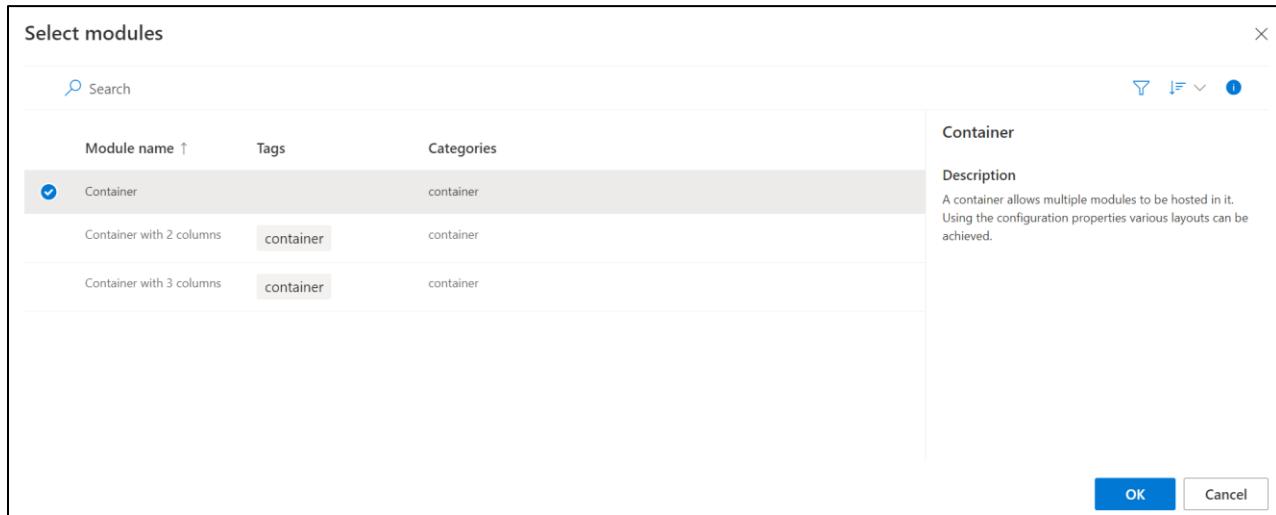
4. Select **Sub footer slot** and then select + **Add module**.

The screenshot shows the page outline for 'IADUser01Page' in 'Draft' mode. The outline tree is as follows:

- IADUser01Page
  - Default Page (Required)
    - Header slot
    - Sub header slot
    - Main slot
    - Sub footer slot** (highlighted)
    - Footer slot

On the right side of the outline, there are two buttons: '+ Add module' and 'Add fragment'.

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



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

The screenshot shows the 'IADUser01Page' outline. The 'Outline' section lists slots: Header slot, Sub header slot, Main slot, Sub footer slot, and Footer slot. The 'Container 3' slot is currently selected, highlighted with a grey background. To the right of the outline, there is a 'Module actions' menu with the following options: Add module, Add fragment, Clone, Delete, Share as fragment, Targeting, and New target. The 'Add module' option is the first item in the list.

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

## Select modules

The screenshot shows a search interface with a search bar containing 'Chat'. Below the search bar is a table with three columns: 'Module name ↑', 'Tags', and 'Categories'. There are two rows of results:

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

8. 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 3>Step 9]. 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 \* ⓘ  
https://oc-cdn-ocprod.azureedge.net/...

Data application id \* ⓘ  
981f7b9f-0a52-4a72-9048-c269d86...

Data organization id \* ⓘ  
e103e9eb-cebc-4840-912e-3c8cf4e...

Data organization URL \* ⓘ  
https://unqe103e9ebcebc4840912e...

Code snippet

Widget snippet

```
<script id="Microsoft_Omnichannel_LCWid" get" src="https://oc-cdn-ocprod.azureedge.net/livechatwidget/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://unqe103e9ebcebc4840912e3c8cf4e60-crm.omnichannelengagementhub.com"></script>
```

Proactive chat ▾

Enabled ⓘ

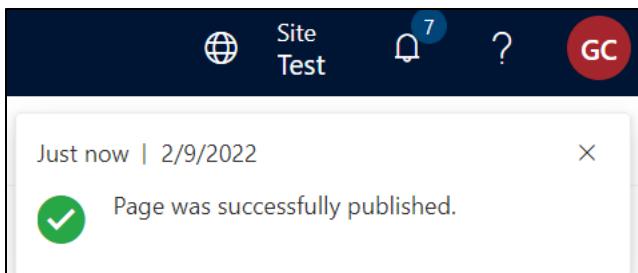
9. Select **Finish editing**.

The screenshot shows the SharePoint ribbon with the following items: Site Test, a bell icon, a question mark icon, and a red circular icon with 'GC'. Below the ribbon, the page title is 'Fabrikam extended online store · en-us'. At the bottom of the page, there are two buttons: 'Finish editing' (highlighted with a red box) and 'Discard edits'.

10. Select **Publish**.

The screenshot shows the SharePoint ribbon with the following items: Delete, Preview, Share, and Publish (highlighted with a red box).

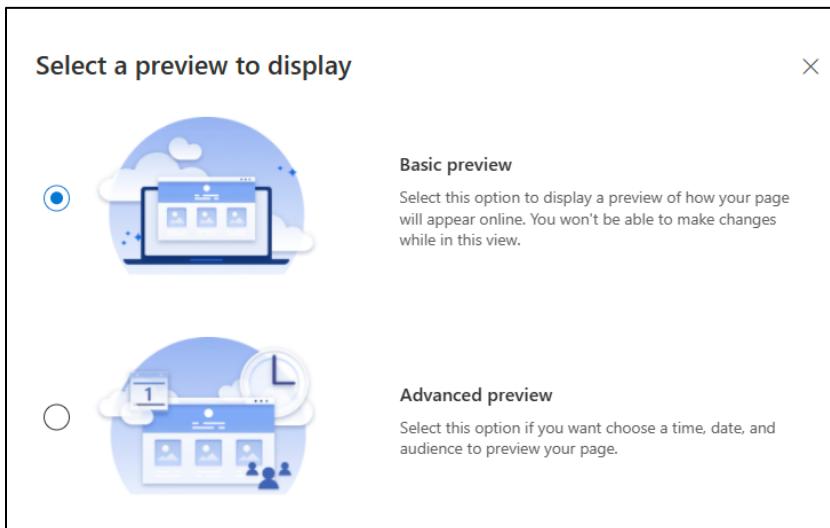
11. If the page has been successfully published, you will see a notification on the top right edge of the browser with a successful message.



12. Select **Preview**.



13. Click on Basic Preview.



14. 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

 Search Sign in   (0)

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

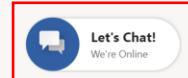
Send us a letter:

Customer Care center

1 Fabrikam Ave

Redmond, WA 98052

USA

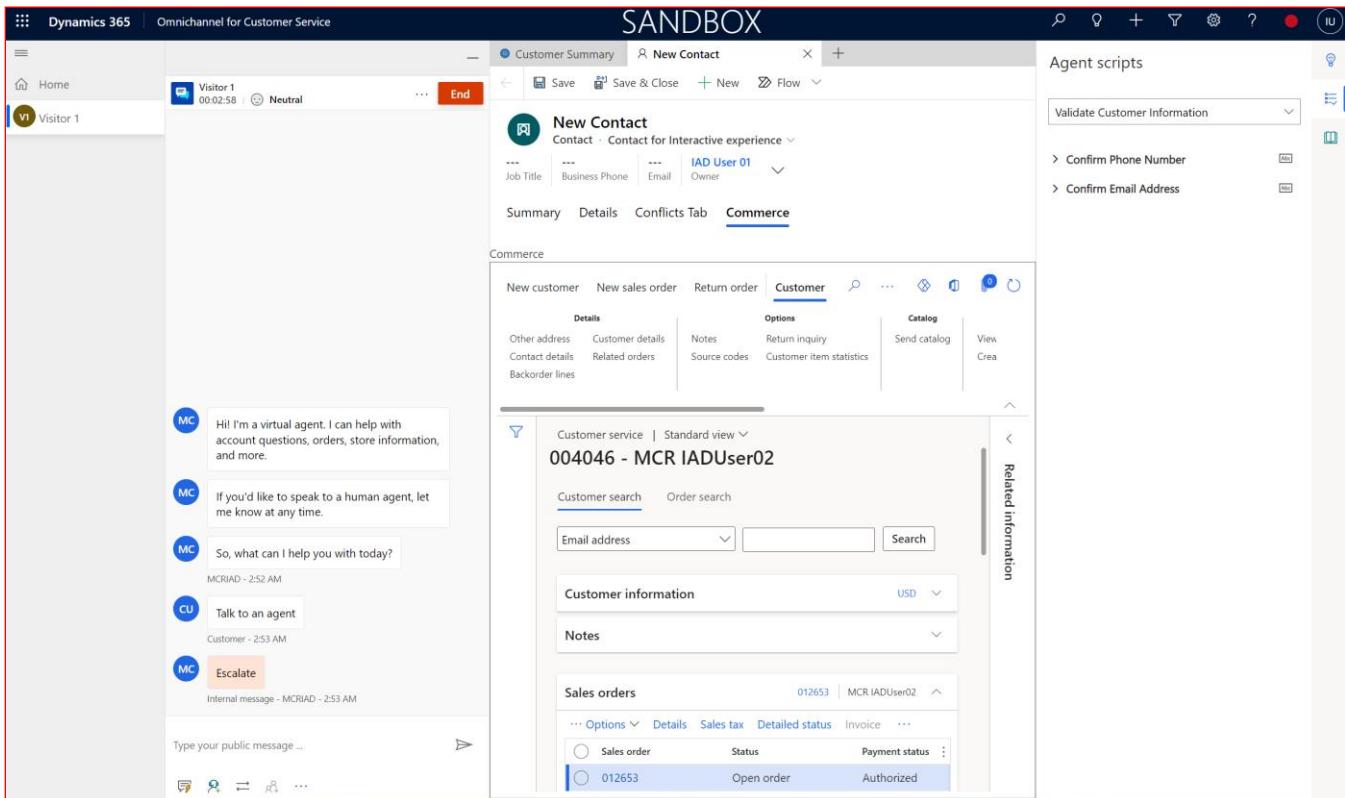


**Congratulations!** In this exercise, you have successfully created & published an e-commerce page, its url and then embedded the chat widget into an e-commerce page.

# 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.

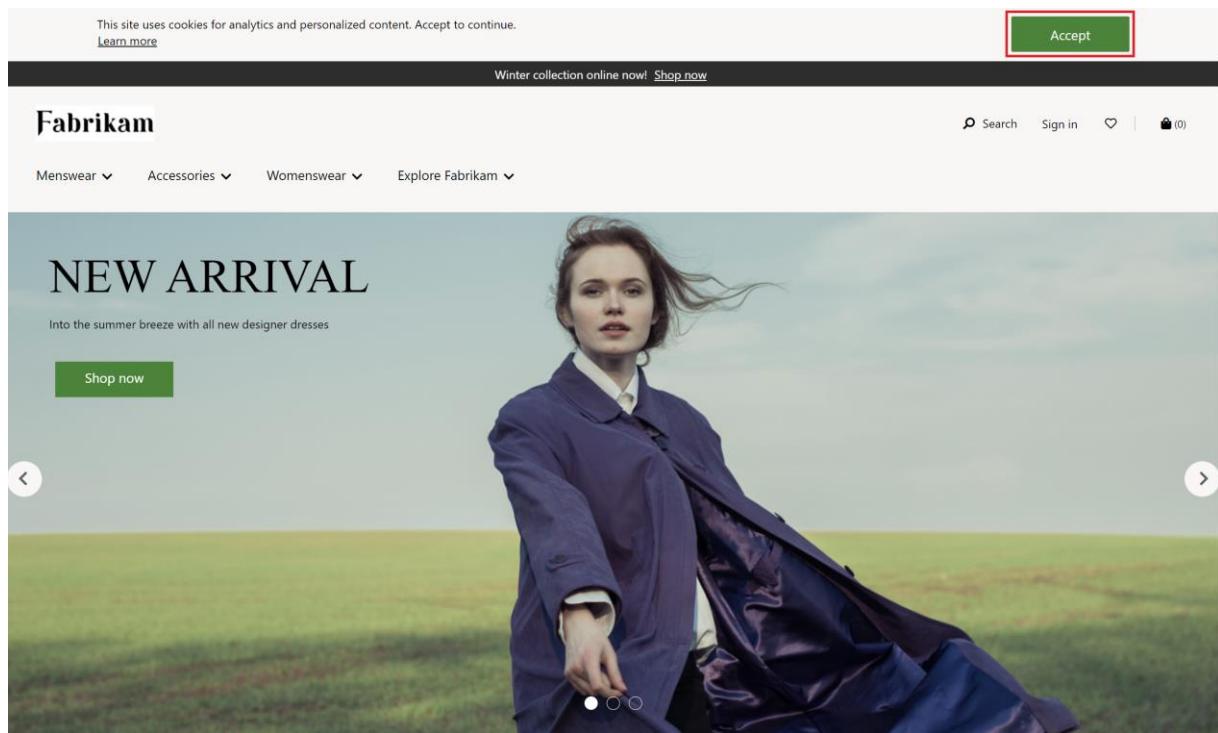


## Task 1: Customer creates an account, logs into e-Commerce Site and places an order

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 (under the Environment name of **E-commerce Site URL**.)



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



3. Select **Sign up**

The screenshot shows the 'Sign in' page. On the left, there are fields for 'Email address \*' and 'Password \*', both with placeholder text. Below these are links for 'Forgotten password?' and a large green 'Sign in' button. On the right, there is a section for new users with the heading 'Don't have an account?'. It includes a link 'Create an account with us to track your orders and save your favorites to the Wishlist.' and a large green 'Sign up' button, which is also highlighted with a red box.

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. Check your email using <https://outlook.office.com> and signing in using the provided user.
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**

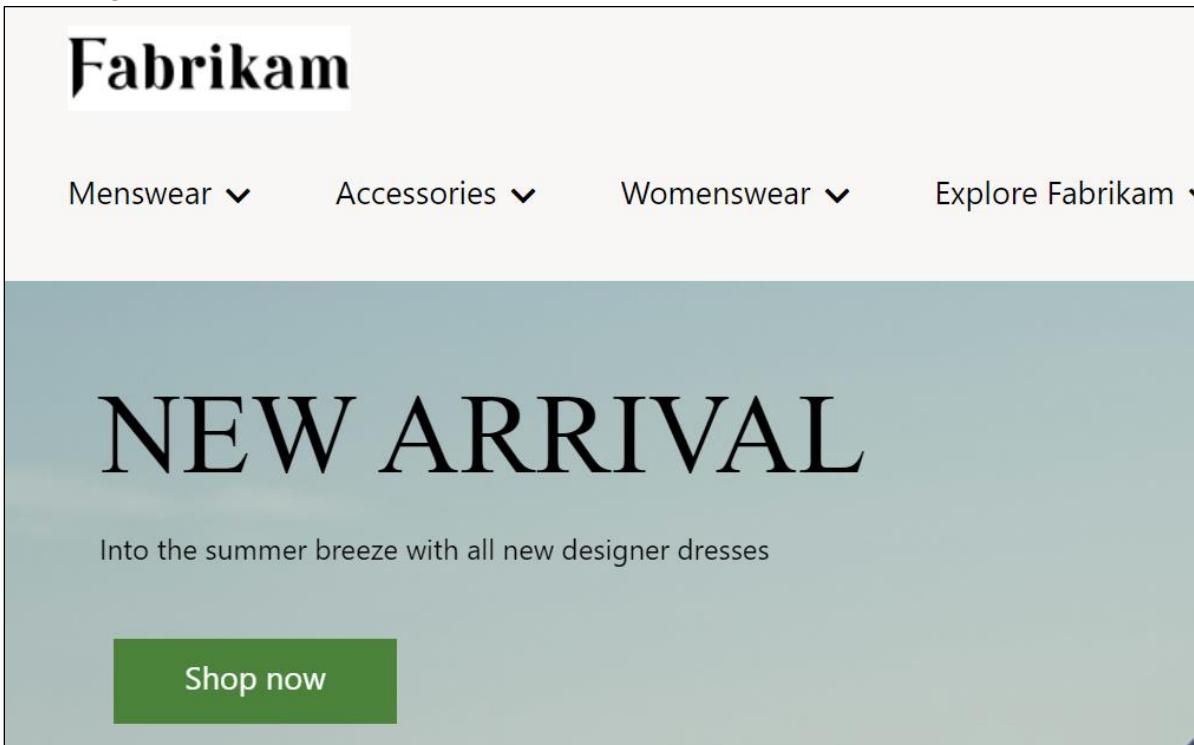
7. Enter a password, confirm the password and select **Sign up**.

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
<hr/> TOTAL	<hr/> \$98.00

 Checkout

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

1. SHIPPING ADDRESS

 **Delivery** (1 item)



Name \*  
MCR IAD

Street \*  
Test123

City \*  
Redmond

State \*  
Washington

Zip code \*  
98052

Country \*  
United States

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**

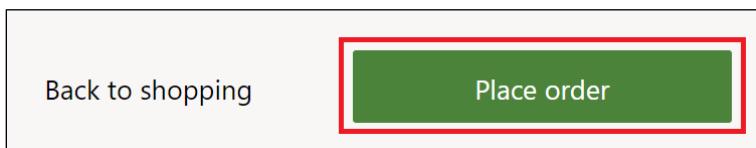
13. Provide the dummy test payment details below and select **Save & continue**

- 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

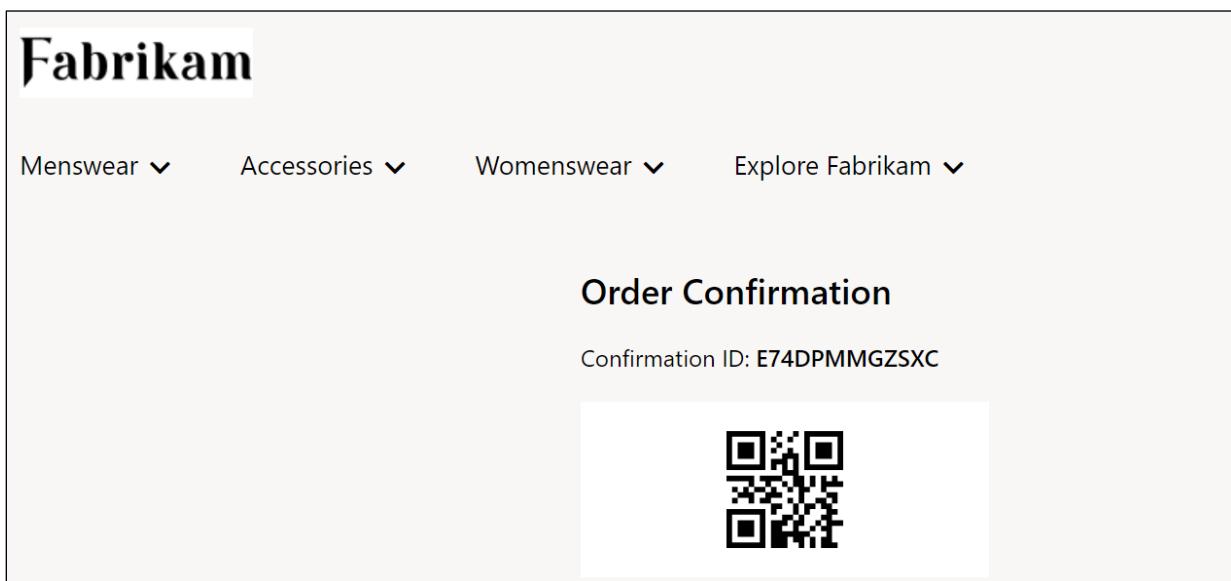
- i. **State/province** : WA
- j. **ZIP code** : 98052
- k. **Same as shipping address** : Set the checkbox to Yes.

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				
<a href="#" style="background-color: #5cb85c; color: white; padding: 5px 20px; text-decoration: none; font-weight: bold;">Save &amp; continue</a>				

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

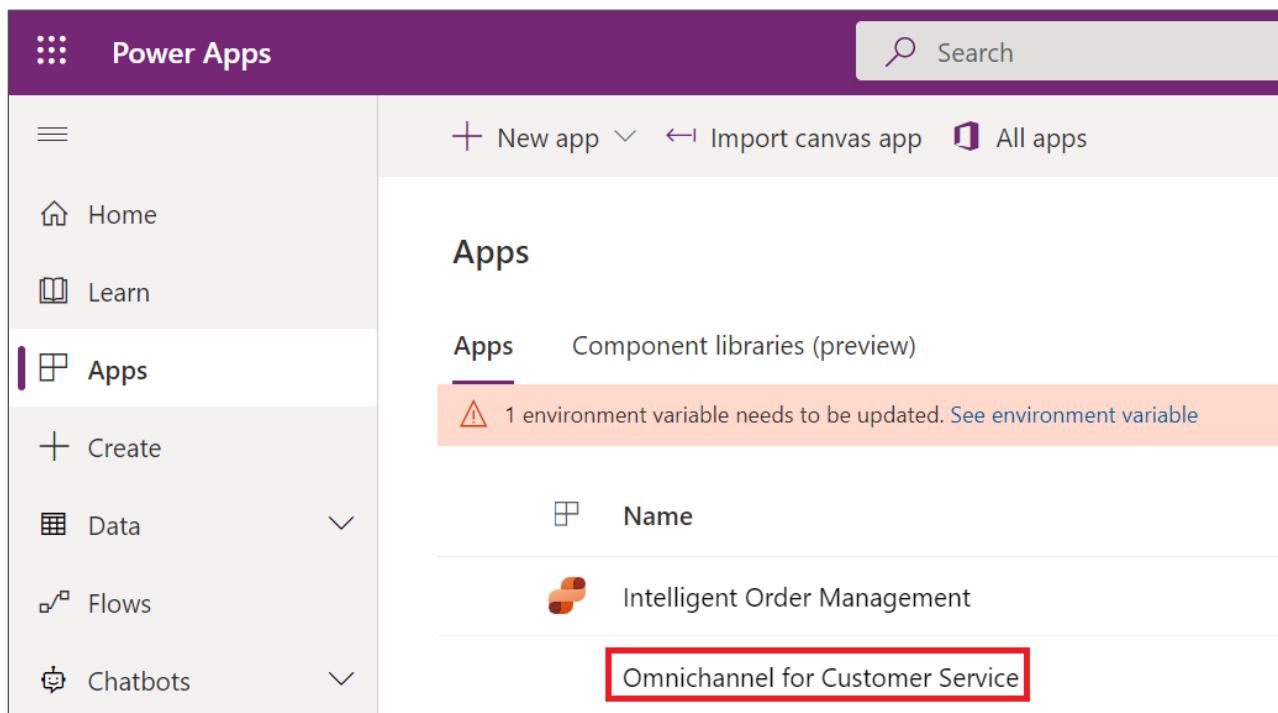
In this task, you will login into Omnichannel for Customer Service as a Customer agent.

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. Use the URL provided under the Environment Name of "**D365 F&O Environment:**"

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. Use the Environment pointed under the Environment Name of "**D365 Omnichannel for Customer Service/Dataverse Environment Name:**"



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.

- 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.

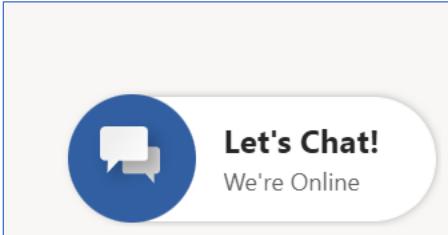


**Congratulations!** You have successfully logged in as both the customer and the live agent. Now it's time to start the PVA Bot conversation.

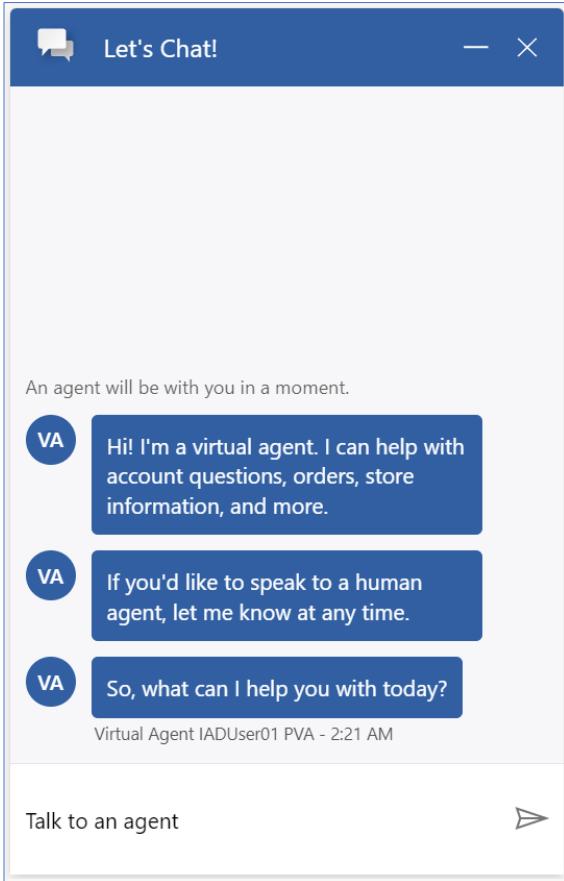
### Task 3: Customer Escalates through PVA Bot

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

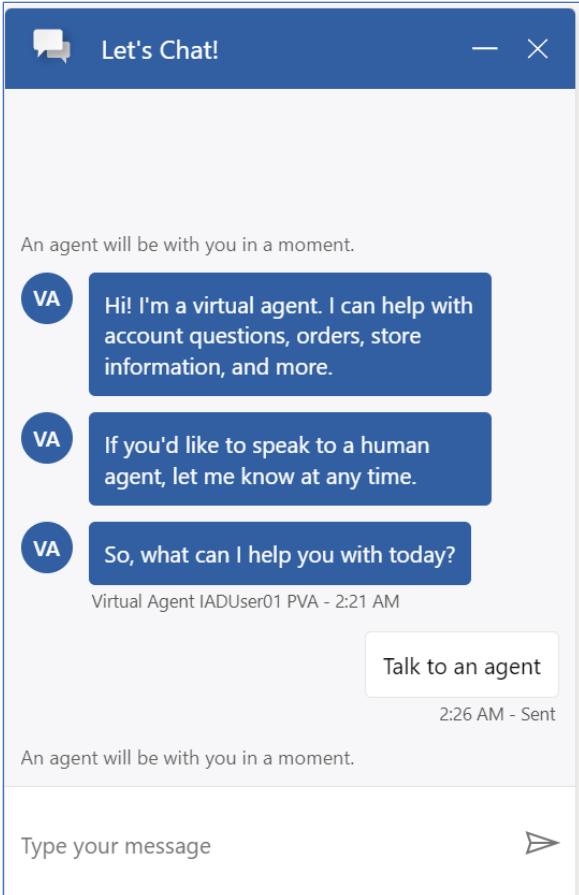
1. Open a new tab page in your browser and append the e-Commerce Portal's url at the end with the url name created in Exercise 5- Task 2. For Ex: <https://mcriad.commerce.dynamics.com/iaduser01page>
2. Select **Let's Chat** PVA Bot chat widget in the bottom right corner of the site.



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.**



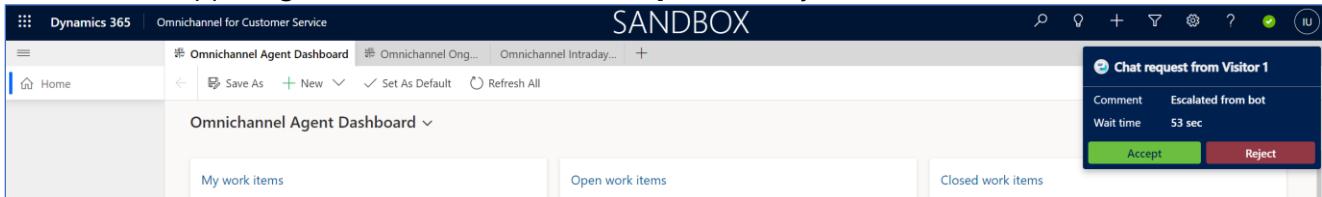
6. Now let's switch over to the Omnichannel for Customer Service app so you can accept the escalation as an agent.

**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.

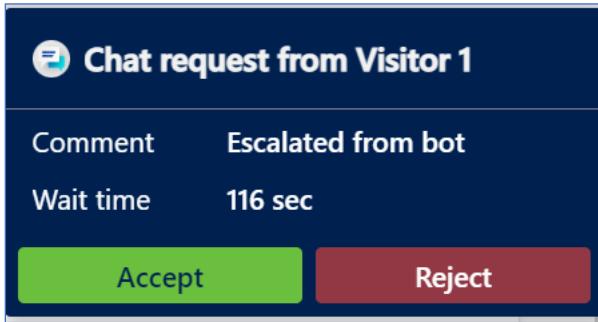
## Task 4: Agent Provides Personalized Service in Omnichannel for Customer Service with the Productivity Pane

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.

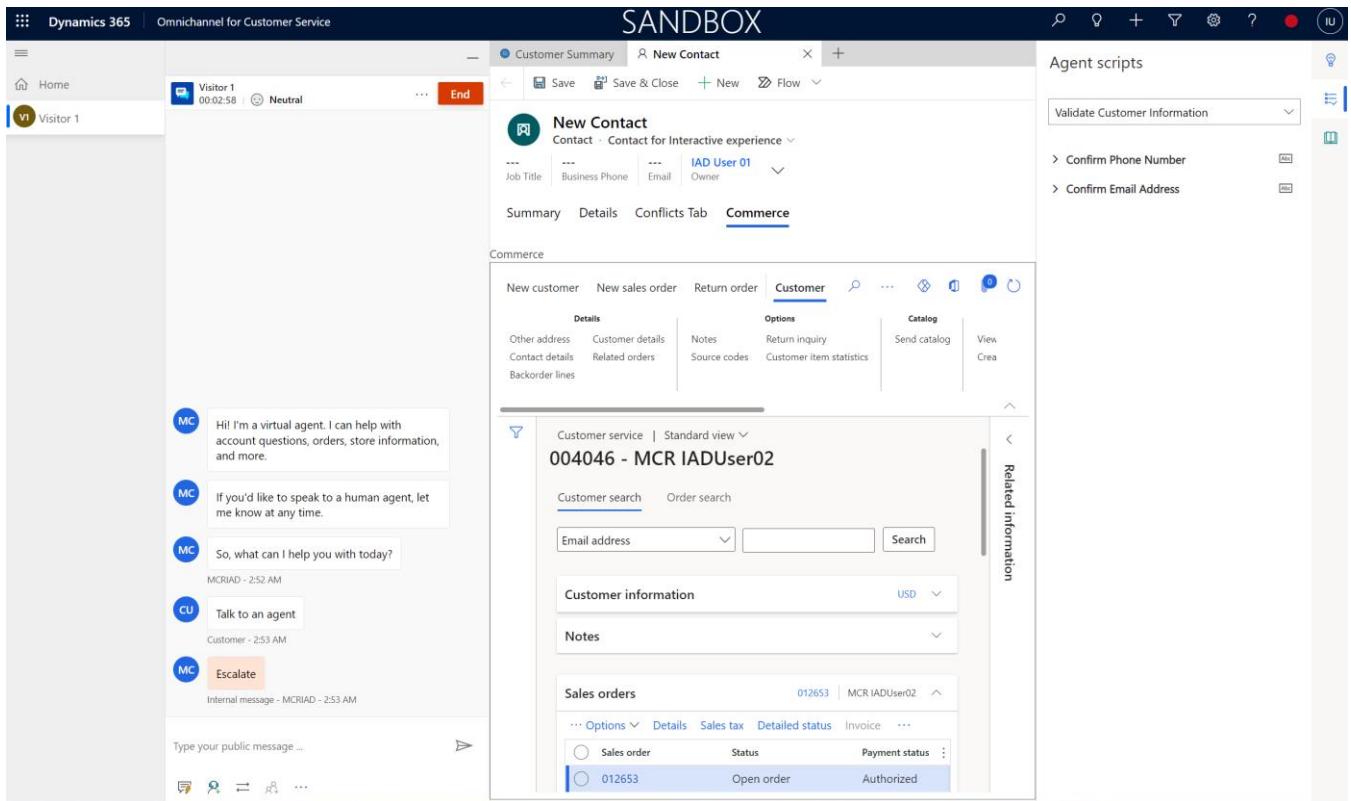
1. Navigate back to the **Omnichannel for Customer Service** app. You should be signed in as your IAD User.
2. Notice in the upper right corner there is a **Chat request** from your user.



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 Dataverse 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:

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

The screenshot shows the Dynamics 365 Customer Service interface. On the left, there is a live chat window with a visitor named 'Visitor 1' (00:00:13, Neutral). The visitor asks 'So, what can I help you with today?'. The agent responds with 'Customer Name : Giri, 1234' and 'Customer ID : MCRiad - 9:54 AM'. The visitor then asks if they can rephrase their question. The agent replies with 'Customer Name : Jennifer Beach' and 'Customer - 9:55 AM'. The visitor again asks for rephrasing. The agent then suggests 'Talk to an agent' and 'Escalate'. An internal message is sent to 'MCRiad - 9:55 AM'. At the bottom, there is a text input field for public messages and a toolbar with icons for copy, paste, and more.

**New Conversation**

**Details**

Search customer ---

Search for or create a new customer, and link

+ New Account + New Contact

**Conversation summary**

Pre-chat survey Visitor details

No pre-chat survey found

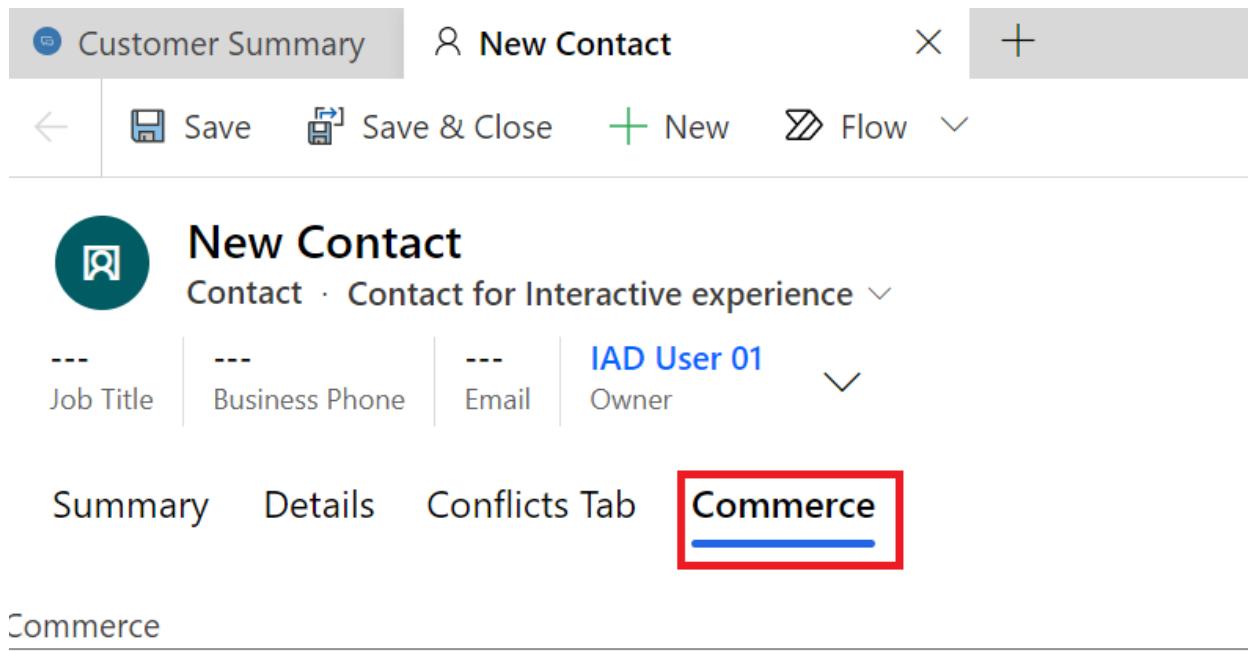
**Conversation details**

Engagement channel Live Chat

Waiting time 9 secs

Queue IADUser01 Escalate To Human

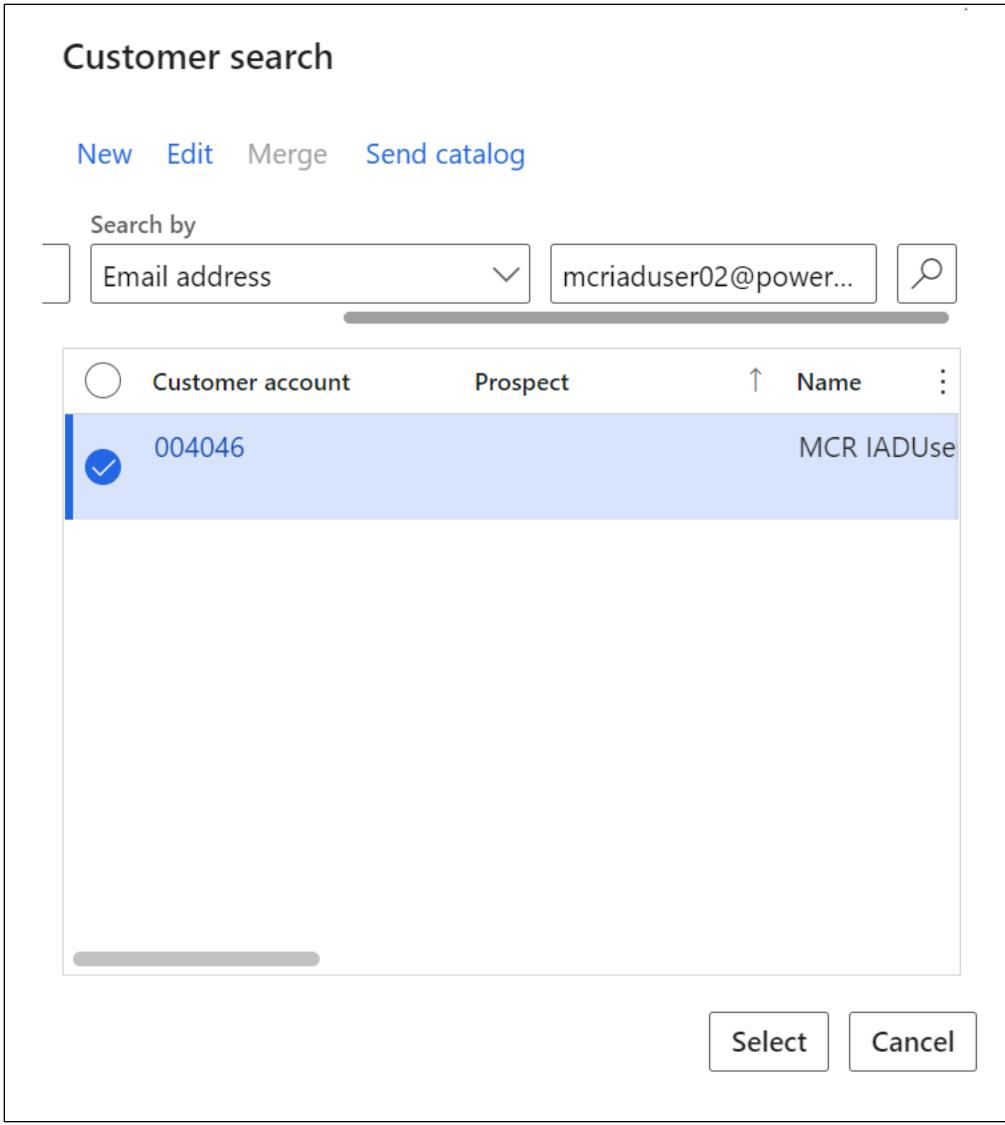
- b) On the **New contact** tab, select **Commerce** and this will open the embedded F&O Customer Service screen.



- 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.

The screenshot shows the 'New Contact' screen in Microsoft Dynamics 365. At the top, there is a contact card with fields for Job Title (---), Business Phone (---), Email (---), and Owner (IAD User 01). Below the card, tabs include Summary, Details, Conflicts Tab, and Commerce, with Commerce being the active tab. A sub-header 'commerce' is visible. The main area is titled 'Customer' and includes links for New customer, New sales order, Return order, and a search bar. Below this, two sections are shown: 'Details' (Other address, Customer details, Contact details, Related orders, Backorder lines) and 'Options' (Notes, Customer item statistics, Source codes, Prospect details, Return inquiry, Sales quotation). On the right, there are buttons for Campaign, Call list, and Activity details. A sidebar on the left shows 'Customer service | Standard view' and a 'Customer service' section with 'Customer search' (selected) and 'Order search'. The 'Customer search' section contains an 'Email address' input field containing 'mcriaduser02@power...', a red box highlights this field, and a 'Search' button next to it. A red box also highlights the 'Search' button. To the right of the search section is a 'Related information' sidebar.

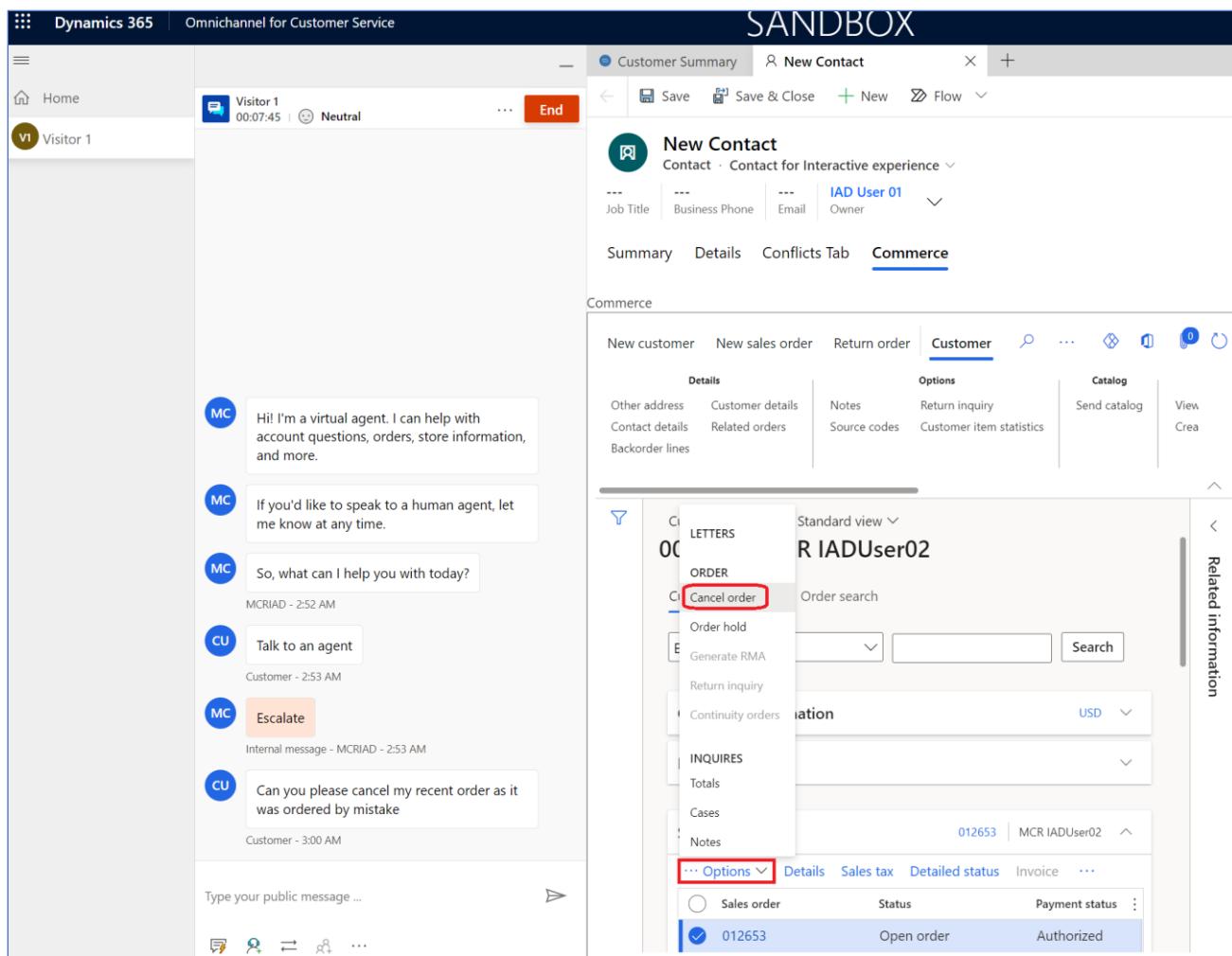
- d) Select the customer and then click **Select** button.



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

The screenshot shows the Microsoft Dynamics 365 Commerce interface. At the top, there are tabs: Summary, Details, Conflicts Tab, and Commerce, with Commerce being the active tab. Below the tabs is a header bar with the word 'Commerce' and several icons: New customer, New sales order, Return order, Customer (highlighted in blue), a magnifying glass icon, three dots, a gear icon, a person icon, and a file icon. The main content area is titled 'Customer' and contains three columns: 'Details' (Other address, Contact details, Backorder lines), 'Options' (Notes, Related orders, Source codes), and 'Catalog' (Send catalog, View catalog, Create catalog). Below this is a section titled 'Customer service | Standard view' showing the ID '004046 - MCR IADUser02'. It includes a search bar with 'Customer search' selected, an email input field containing 'mcriaduser02@power...', and a 'Search' button. A detailed 'Customer information' section shows the name 'MCR IADUser02' and the address 'Test123, Redmond, WA 98052, USA'. There is also a currency selector set to 'USD'.

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. Below that is an 'Order Confirmation' section with the text 'Order placed on: 2/26/2022' and 'Confirmation ID: E74DPMGZ5XC'. On the right, there's a user menu with options: 'My account' (highlighted with a red box), 'Order history', and 'Sign out'.

## Order details

### Online purchase

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



#### Canceled (1 item)



**Silk Belted Sheath**  
Size: 2  
Qty: 1

[Buy it again](#)

\$98.00

Canceled

#### Ship to

MCR IAD  
Test123  
Redmond, WA 98052  
USA

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 4: Configure Agent Scripts

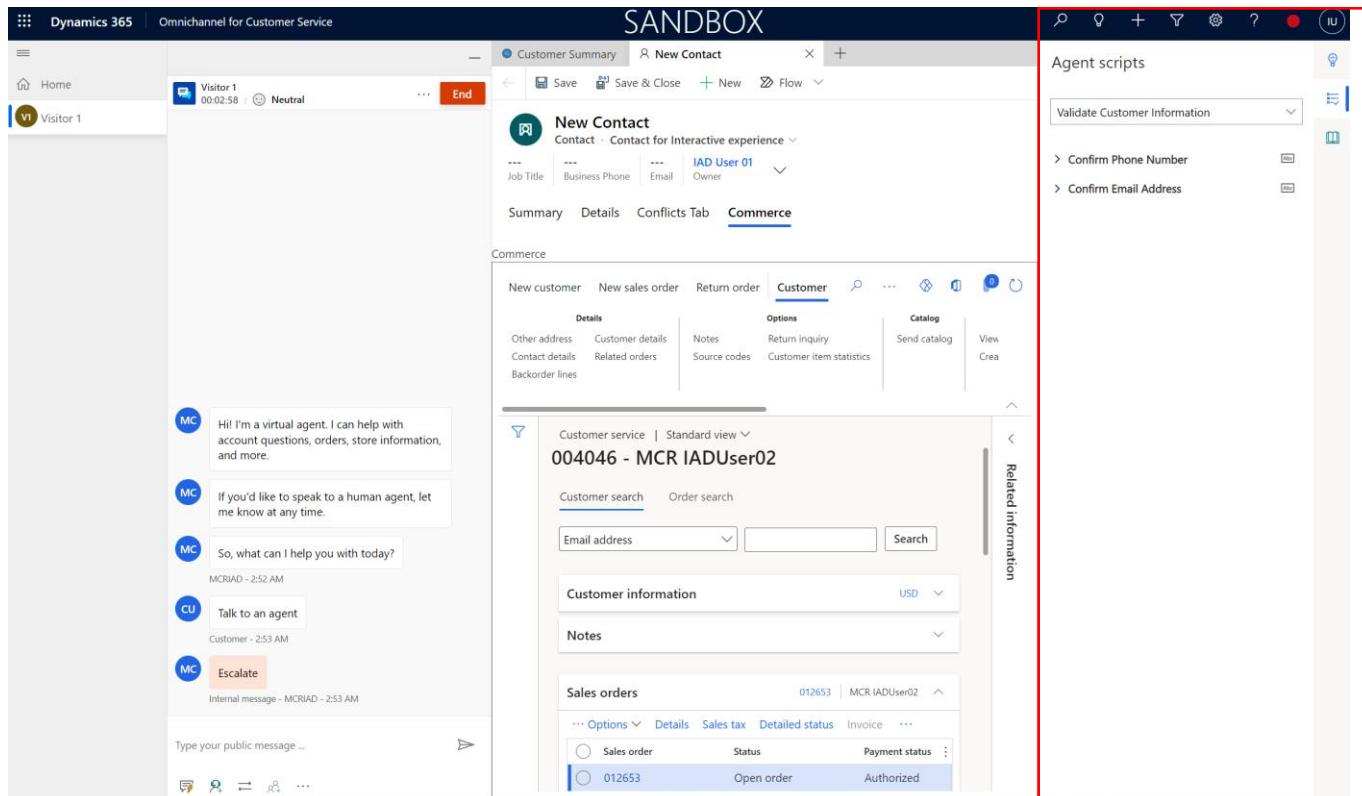
Fabrikam Retail wants to ensure they have proper tools in place to provide the best service and guidance during customer interactions.

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.



## Task 1: Assign Productivity Tools Administrator Role

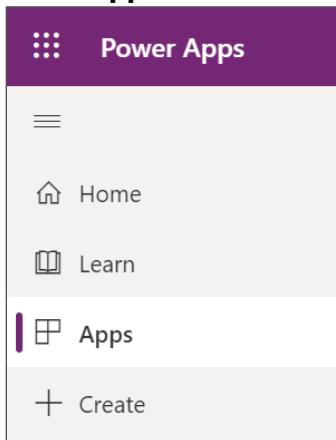
In this task, you will verify if assigned and if not assigned already, proceed to assign the necessary roles to your user to create and use agent scripts. Specifically, you will be adding the **Productivity tools administrator** and **Productivity tools user** roles. The Productivity tools administrator 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](#)

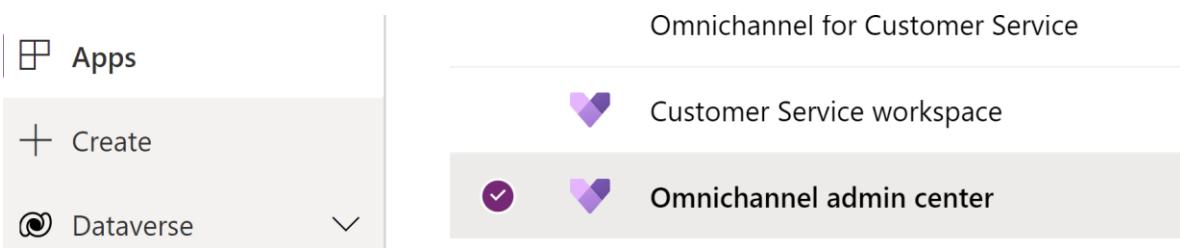
1. Using an In-Private or Incognito window, navigate to [Power Apps](#).
2. Select the correct environment from the upper right **Environment** drop down.



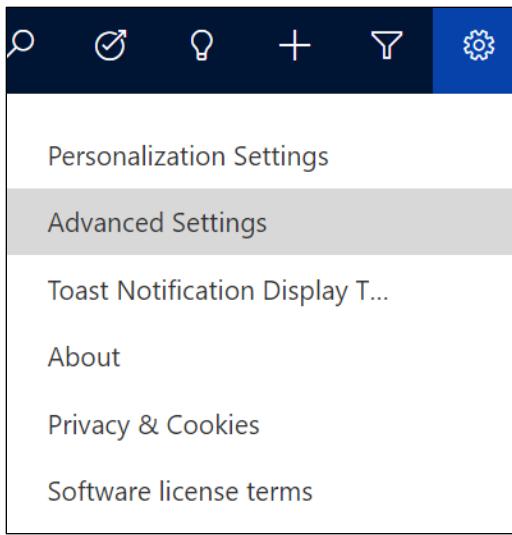
3. Select **Apps** on the left navigation bar.



5. Open the **Omnichannel Admin Center** app.



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



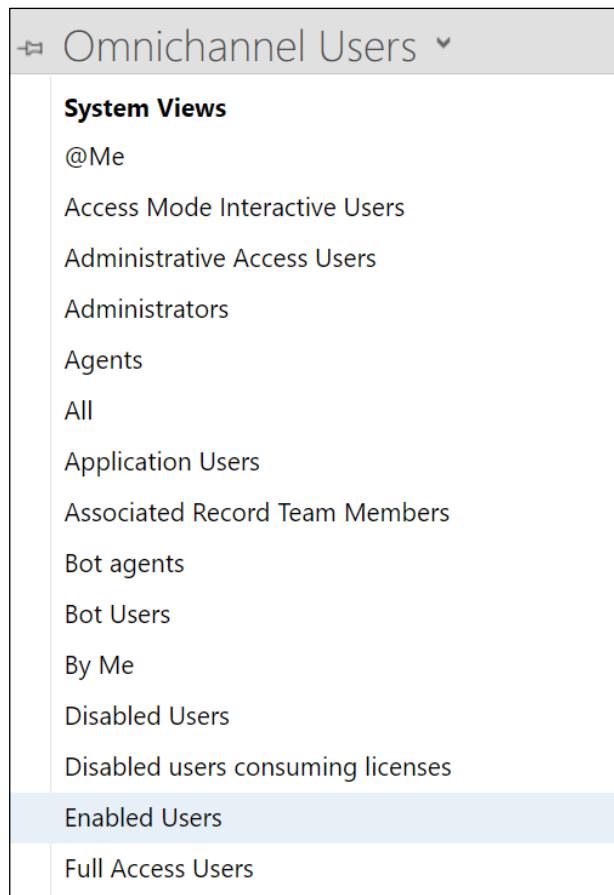
7. A new window should open and navigate to Dynamics 365. It may take a while to load. If it's been longer than a minute, stop and reload the page. It should then load faster.
8. In Dynamics 365, select **Settings > Security**.

A screenshot of the Dynamics 365 Settings page. The top navigation bar shows 'Dynamics 365' and 'Business Management'. Below is a large red button with a gear icon labeled 'Settings'. The main content area is divided into three columns: Business, Customization, and System. The 'System' column contains several options, with 'Security' highlighted by a grey background.

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

A screenshot of the Security page. The title 'Security' is at the top. Below is a section titled 'Which feature would you like to work with?' with a table. The first row shows 'Users' with a user icon, a description 'Add new users. Edit information about users and deactivate user records. Manage the teams, roles, and licenses assigned to users.', and a 'Details' button.

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.



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'. At the top, there are several command buttons: NEW, EDIT, APPROVE EMAIL, REJECT EMAIL, PROMOTE TO ADMIN, MANAGE ROLES, and CHANGE BUSINESS UNIT. Below the buttons is a search bar with the placeholder 'Search Results'. The main area displays a table with columns: Full Name ↑, Position, Main Phone, Business Unit, and Site. A single row is visible, showing a checked checkbox, the name 'mcr iaduser80', and the business unit 'operations-mcriad'.

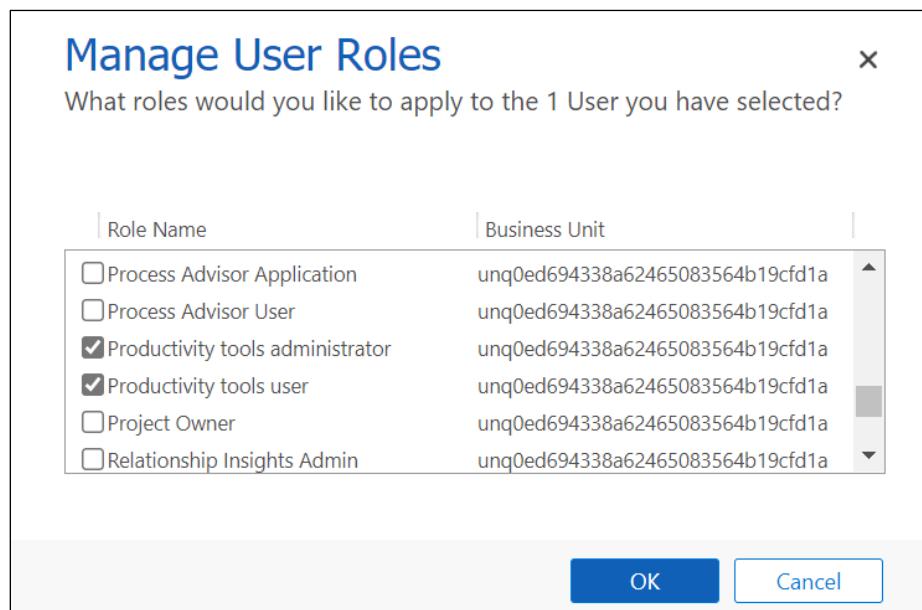
12. Select your user for the training and select **Manage Roles** on the top command bar.

Search Results ▾

	Full Name ↑	Position	Main Phone	Business Unit	Site
<input checked="" type="checkbox"/>	mcr iaduser80			<a href="#">operations-mcriad</a>	

13. Scroll down and verify if the two roles are selected. If not already selected, select the following two roles for 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 Admin Center 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 the creation of this agent script and its steps.

1. Navigate to **Omnichannel Admin Center** application which you opened in the first task.

In the left navigation bar, under **Agent Experience** click **Manage on Agent scripts**

The screenshot shows the Dynamics 365 Omnichannel Admin Center interface. The left sidebar has a 'Agent experience' section highlighted with a red box. Other sections include Home, Users, Queues, Workstreams, Channels, Record routing, Advanced settings, User attributes, Customer settings, Supervisor settings, and Diagnostics. The main content area is titled 'Agent experience' with the sub-section 'Agent productivity'. It lists 'Personal quick replies', 'Transcript', 'Quick replies', and 'Agent scripts'. The 'Agent scripts' section is also highlighted with a red box. Each item has a 'Manage' button to its right.

2. 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 'General' tab is selected. The form fields are:

- Name\***: Validate Customer Information
- Unique Name\***: msdyn\_ValidateCustomerInformation80
- Owner\***: mcr iaduser80
- Language\***: English (United States)

On the right side, there is a section titled 'Agent script steps' with a table:

Step	Action
1	✓   Name ↴

3. 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 :

4. 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 :

5. 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 the customer to confirm phone number.

## Confirm Phone Number - Saved

Agent script step

General Related

Name	*	Confirm Phone Number
Unique Name	*	msdyn_ConfirmPhoneUser80
Owner	*	 mcr iaduser80
Agent script	*	 Validate Customer Information
Order	*	1
Action type	*	Text
Text instructions	*	Ask customer to confirm phone number

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

Agent script steps			
Name	Order	Action type	Modified On
Confirm Phone Number	1	Text	9/13/2021 3:19 PM

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

## Confirm Email Address - Saved

Agent script step

**General**   **Related**

Name	*	Confirm Email Address
Unique Name	*	msdyn_ConfirmEmailAddressUser80
Owner	*	 mcr iaduser80
Agent script		 Validate Customer Information
Order	*	2
Action type	*	Text
Text instructions	*	Ask Customer for Email Address. Verify their response matches information on file

9. 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

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

## Validate Customer Information - Saved

Agent script

General Related

Name*	Validate Customer Information
Unique Name*	msdyn_ValidateCustomerInformation80
Owner*	mcr iaduser80
Language*	English (United States)
Description	---

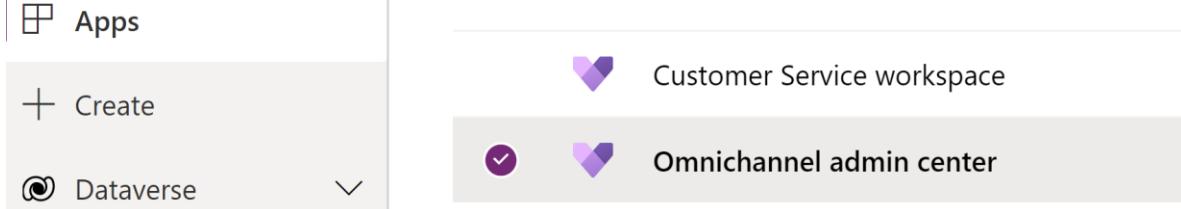
Agent script steps			
	Name	Action type	Modified On
✓	Confirm Phone Number	1 Text	4/1/2022 7:25 PM
	Confirm Email Address	2 Text	4/1/2022 7:28 PM

**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 Admin Center** app in Power Apps if you aren't already in it.  
Omnichannel for Customer Service



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

Application tab templates	Choose which tabs to open when a new session begins. Create different templates for different session types. <a href="#">Learn more</a>	Manage >
Session templates	Choose which session templates open when a new session starts. <a href="#">Learn more</a>	Manage >
Custom presence	Set presences to update automatically or allow agents and supervisors to update manually. You can also create custom presences. Presence will be used when assigning work to available agents. <a href="#">Learn more</a>	Manage >
Data masking	Create rules to mask sensitive data sent by customers or agents, such as credit card information, social security numbers (SSN), or profanity. <a href="#">Learn more</a>	Manage >

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

Chat session-IADUser80 - Saved

Session Template

General Agent scripts Related

Name	* Chat session-IADUser80	Anchor Tab	* <input checked="" type="checkbox"/> Customer Summary
Unique Name	* msdyn_chat_IADUser80	Additional Tabs	
Type	* Generic	<input checked="" type="checkbox"/> Name ↑ ↴ Can close ↴	
Title	{customerName}	N	
Communication panel mode	* Docked		
Description	---		
Owner	*  mcr iaduser80		

5. Select the **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

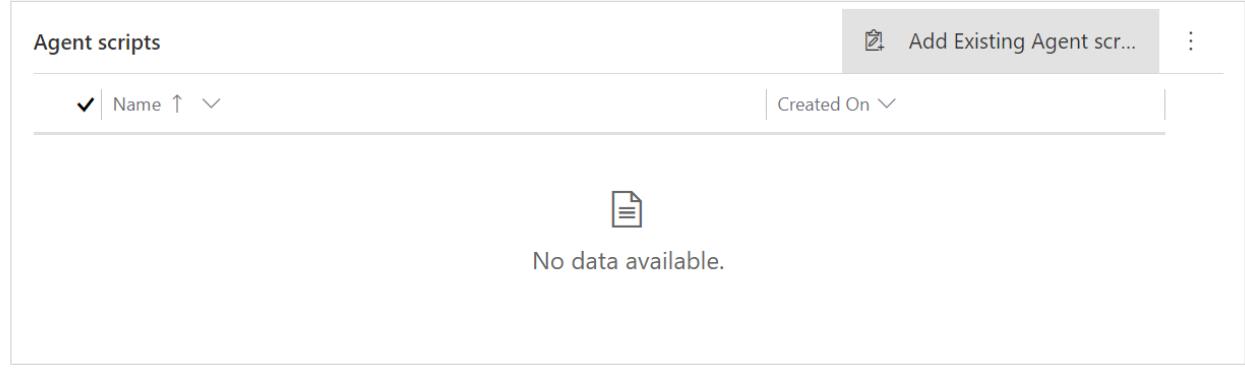
General Agent scripts Related

Agent scripts

Add Existing Agent scr... :

✓ Name ↑ ▾      Created On ▾

No data available.



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

Lookup Records X

Select record

 Select record

[← All](#) Agent scripts

 Validate Customer Information  
4/1/2022 7:23 PM

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

Lookup Records X

Select record

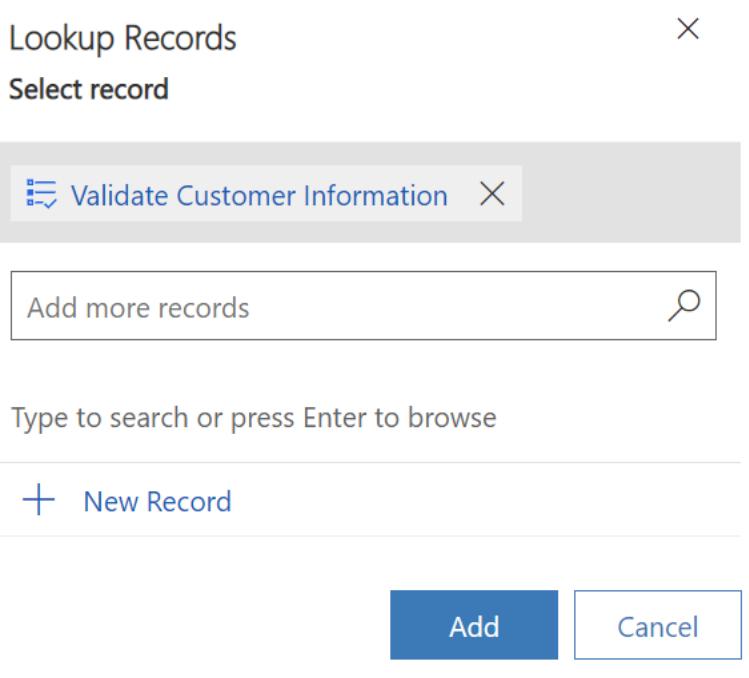
 Validate Customer Information X

Add more records Select record

Type to search or press Enter to browse

+ New Record

Add Cancel



9. Navigate to **Work Streams**.

The screenshot shows the 'All workstreams' view. The top navigation bar includes 'New workstream', 'Edit' (highlighted with a red box), 'Copy', 'Delete', and 'Refresh'. The left sidebar has sections for 'Pinned', 'General settings' (with 'Home', 'Users', and 'Queues' options), and 'Workstreams' (which is currently selected). The main area displays a table with three rows:

Name ↓	Type
MRIADUser80 Chat Workstream	Messaging
MRIADUser95 Chat Workstream	Messaging
Test96	Messaging

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

11. Scroll down to **Advanced settings> Sessions** and click edit to choose the session template

The screenshot shows the 'Sessions' section under 'Advanced settings'. It lists a single entry: 'Default' with 'Chat session - default' selected. A note below states: 'This determines which tabs to display when an agent begins a new session, and which agent scripts will be used.'

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

Sessions X

**Default template \***

ⓘ Only session templates of type 'Generic' are supported at this time.

[Create session templates](#)

13. Once saved the sessions appear in the Workstream page as below with the Agent notifications

The screenshot shows the 'Advanced settings' section of the Dynamics 365 User Settings page. It is divided into two main sections: 'Sessions' and 'Agent notifications'.  
**Sessions:**  

- Default:** Chat session-IADUser80. A note states: 'This determines which tabs to display when an agent begins a new session, and which agent scripts will be used.'

  
**Agent 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

**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.

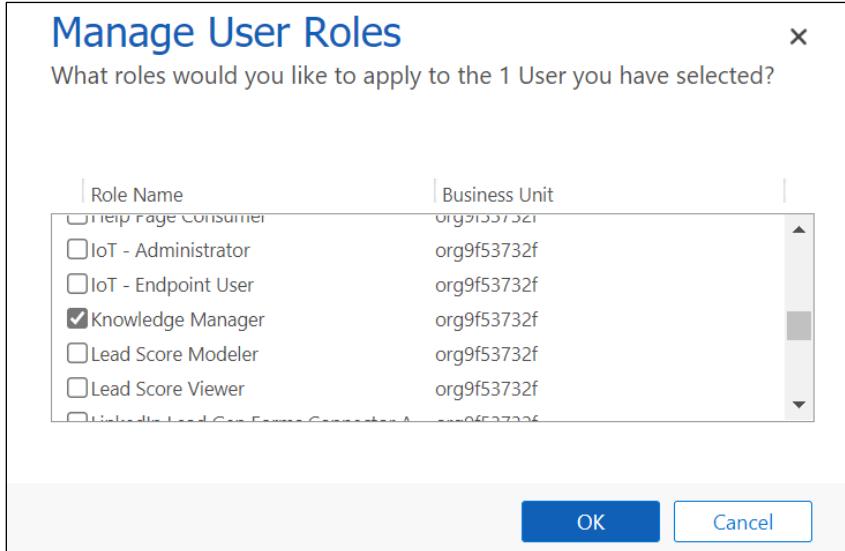
### Task 1: Assign Knowledge Manager User Role

In this task, we will verify if the necessary security role to create and view knowledge articles are present and if not, assign them.

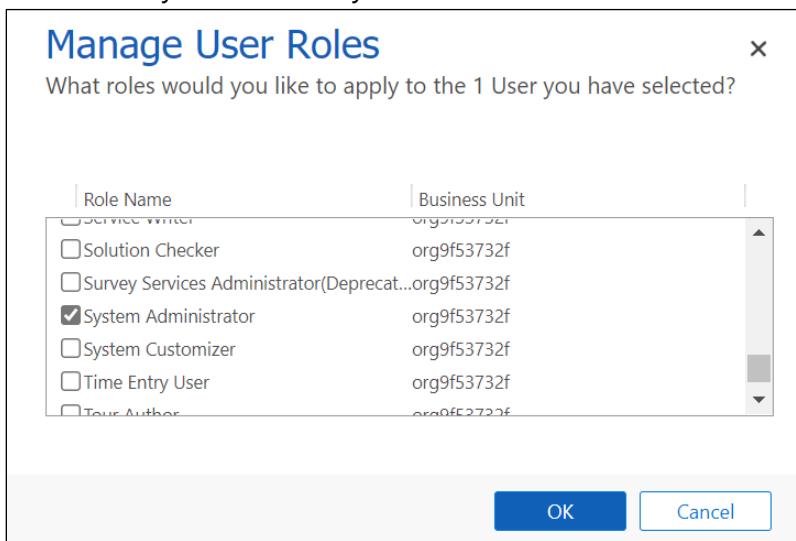
1. If you kept the User Settings page up from the previous exercise, navigate to that page. If you didn't leave it open, follow all the steps in Exercise 2, Task 1 and then return here to assign the proper role.
2. Once you've selected your user and clicked **Manage Roles**, you must assign the necessary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

The screenshot shows the 'Security' page in Dynamics 365. At the top, there are navigation links: Dynamics 365, Settings, and Security. The page title is 'Sandbox'. Below the title, there are several buttons: NEW, EDIT, APPROVE EMAIL, REJECT EMAIL, PROMOTE TO ADMIN, MANAGE ROLES (which is highlighted), and CHANGE BUSINESS UNIT.  
The main area is titled 'Search Results'. A table lists users with the following columns: Full Name, Position, Main Phone, Business Unit, and Site. Two users are listed:  
1. IAD User 01 (checked) - unq0ed694338a62465...  
2. Another user (unchecked)

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, check if the **Knowledge Manager** role is assigned and if not select it.



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.

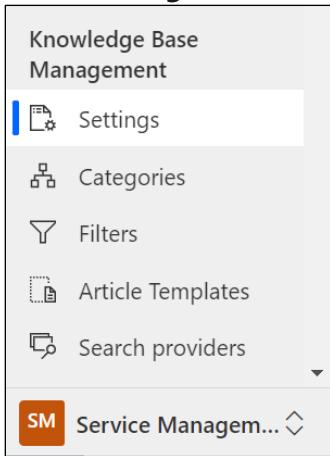
The screenshot shows the Power Apps portal interface. On the left, there's a navigation bar with icons for Home, Learn, Apps (which is selected), Create, Dataverse, Flows, and Chatbots. The main area is titled "Apps" and shows two entries: "Customer Service workspace" and "Customer Service Hub". A red warning banner at the top states: "⚠️ 10 environment variables need to be updated. See [environment variables](#)".

Name	Modified
Customer Service workspace	3 wk ago
Customer Service Hub	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), and Knowledge (Knowledge Articles). At the bottom left, there's a "Change area" dropdown menu with options: Service (selected), Service Management (highlighted), Scheduling, Help and Support, and Service (selected again).

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



- 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**.

This screenshot shows the 'Record Types' configuration page. It has two main sections: 'Available' on the left and 'Selected' on the right. The 'Available' section contains a list of entities, with 'Account' being the first item and highlighted with a red box. The 'Selected' section contains 'Case' and 'Contact', also highlighted with a red box. Between the two sections are four buttons: '>', '>>', '<<', and '<'. Above the sections, there is a note: 'Select the record types for which you want to turn on knowledge base management.'

- 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

This 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 for 'Use an external portal' with a toggle switch. The switch is set to 'No' and is highlighted with a red box.

- 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.

#### Knowledge articles feedback

Enable users to provide feedback on knowledge articles from search control.

Enable feedback

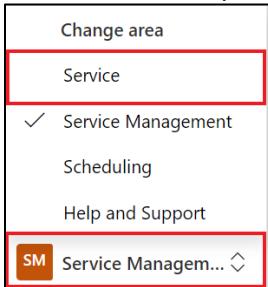


Yes

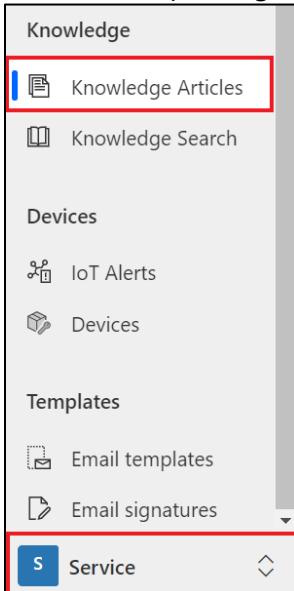
### Task 3: Create Knowledge Article

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**.

The screenshot shows the Dynamics 365 Customer Service Hub interface. On the left, there's a navigation bar with sections like Home, Recent, Pinned, My Work, Customers, Service, Knowledge, and Devices. Under Knowledge, 'Knowledge Articles' is selected and highlighted with a red box. At the top, there's a toolbar with options like Show Chart, New (highlighted with a red box), New From Template, Delete, Refresh, Flow, Excel Templates, Export to Excel, and a search bar. The main area is titled 'My Active Articles' and shows a message 'No data available.' with a document icon.

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

The screenshot shows the 'New Knowledge Article' form. At the top, it says 'New Knowledge Article'. Below that is a process flow with four stages: 'New Process' (Active for less than one mi...), 'Author (< 1 Min)', 'Review', and 'Publish'. The 'Content' tab is selected and highlighted with a red box. Other tabs include 'Summary' and 'Analytics'. The 'ARTICLE CONTENT' section contains fields for 'Title' (with a red asterisk) and 'Keywords'. The 'Description' field is also visible.

5. On the **Article Content section** tab of the new knowledge article, specify the following details:
  - Title:** Returns conditions IADUser <<UserNumber>>
  - 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		

English - United States   Proposed  
Language   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.

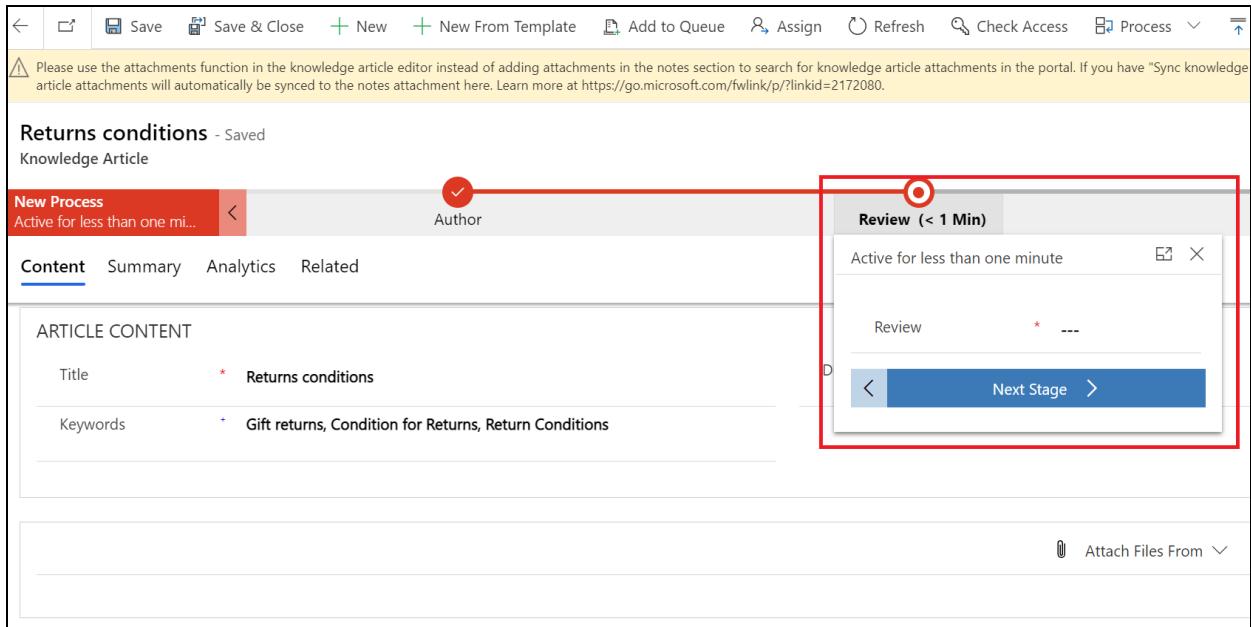
## New Knowledge Article - Unsaved

The screenshot shows the 'New Knowledge Article' interface. At the top, there's a 'New Process' bar with the message 'Active for less than one mi...'. Below it, the 'Content' tab is selected. The main area is titled 'ARTICLE CONTENT' and contains fields for 'Title' (labeled 'Returns conditions') and 'Keywords' ('Gift returns, Condition for'). To the right, a modal window titled 'Author (< 1 Min)' is open, also with a red border. It lists several steps: 'Set Keywords' (checked), 'Article Subject' (checked, labeled 'Default Subject'), 'Assign Primary Author' (dropdown menu open, showing 'IA...', 'X', and a search icon), 'Mark for Review' (checkbox), and 'Mark Complete' (checkbox). The 'Mark for Review' row has a red border.

- 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 modal window again. The 'Article Subject' field is highlighted with a red box. The 'Assign Primary Author' dropdown and its contents ('IA...', 'X', search icon) are also highlighted with a red box. The 'Mark for Review' row, which includes the checkbox and the word 'Completed', is also highlighted with a red box.

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

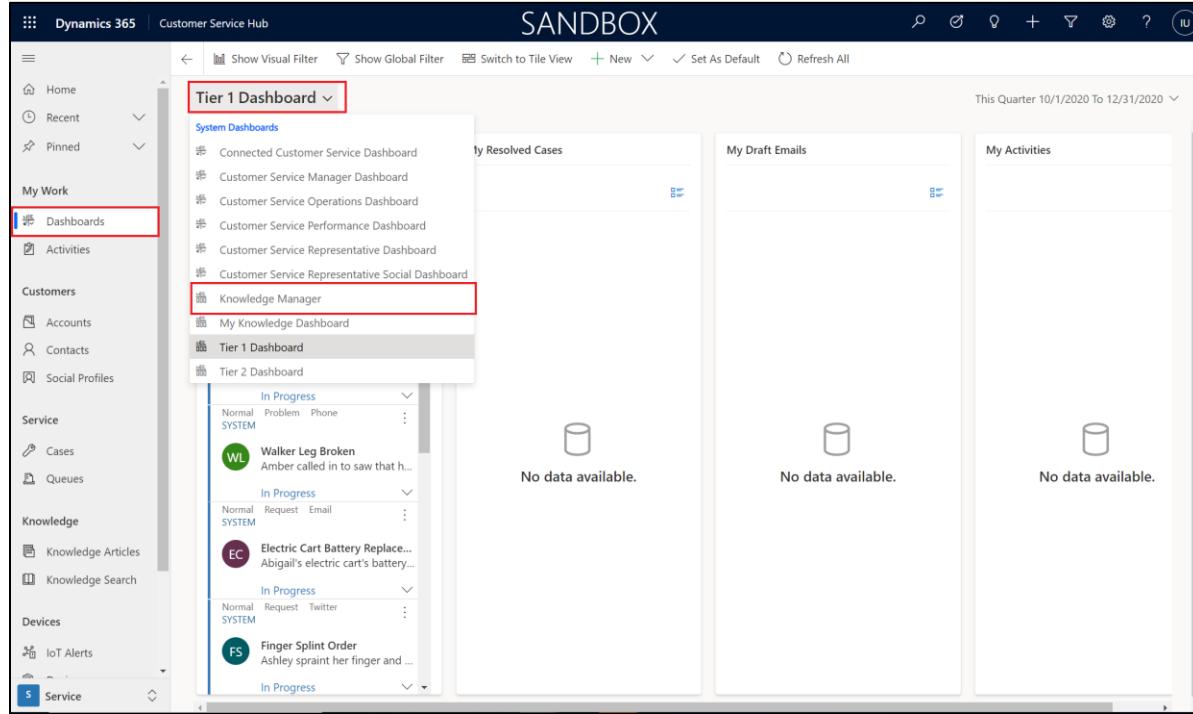


**Congratulations!** You have successfully created a knowledge article for Returns conditions and marked it for review.

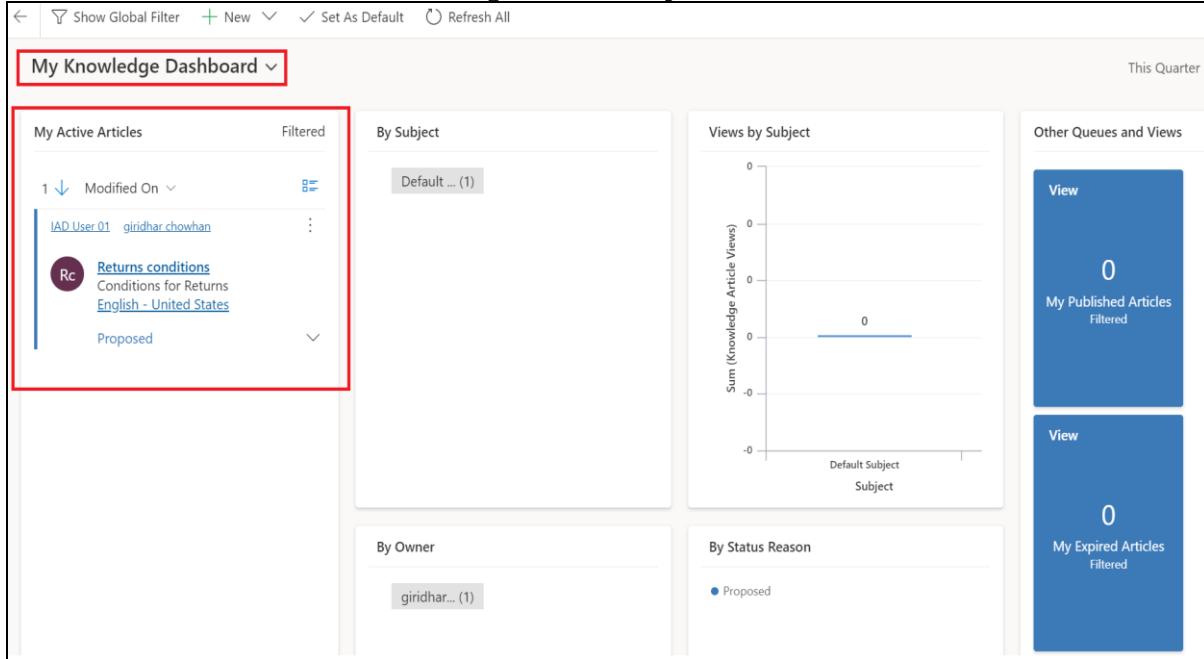
## Task 4: Review and Publish Knowledge Article

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.

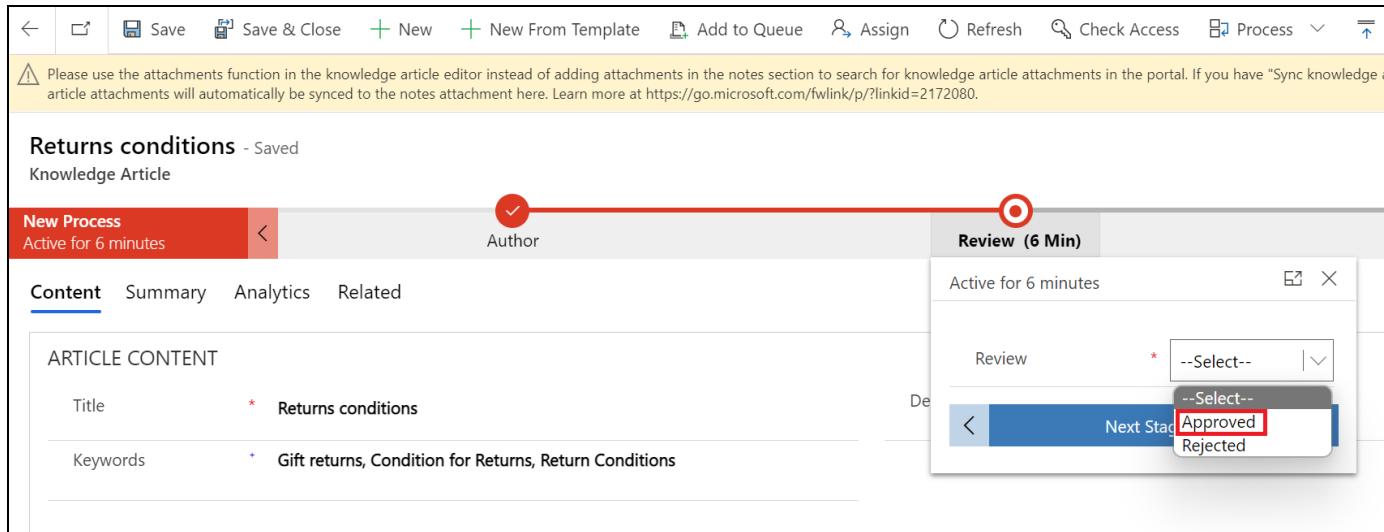
1. In Customer Service Hub, navigate to **Service > Dashboards** and use the drop-down to choose the **My Knowledge Dashboard**.



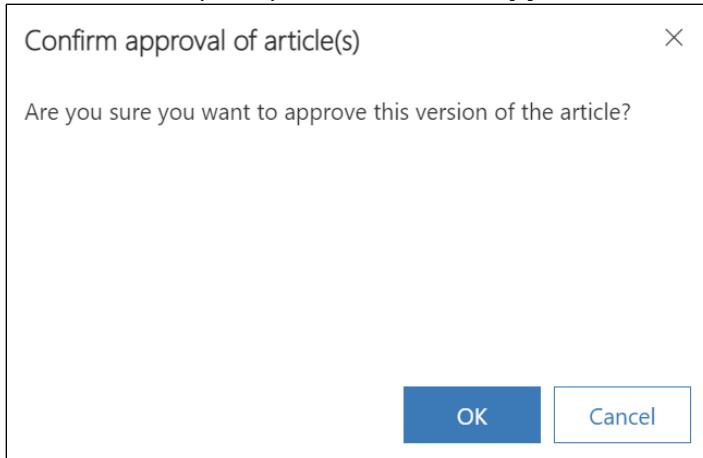
2. Note the **Returns Conditions** knowledge article in **My Active Articles** stream.



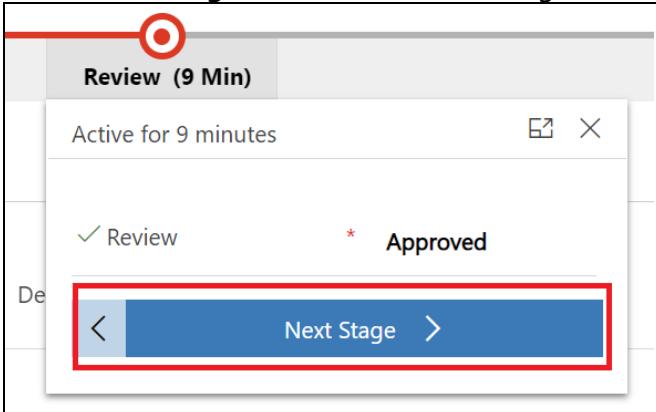
3. Select the **Returns Conditions** knowledge article.
4. On the Business process bar, in the **Review** stage and in the **Review** drop-down, select **Approve**.



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**.

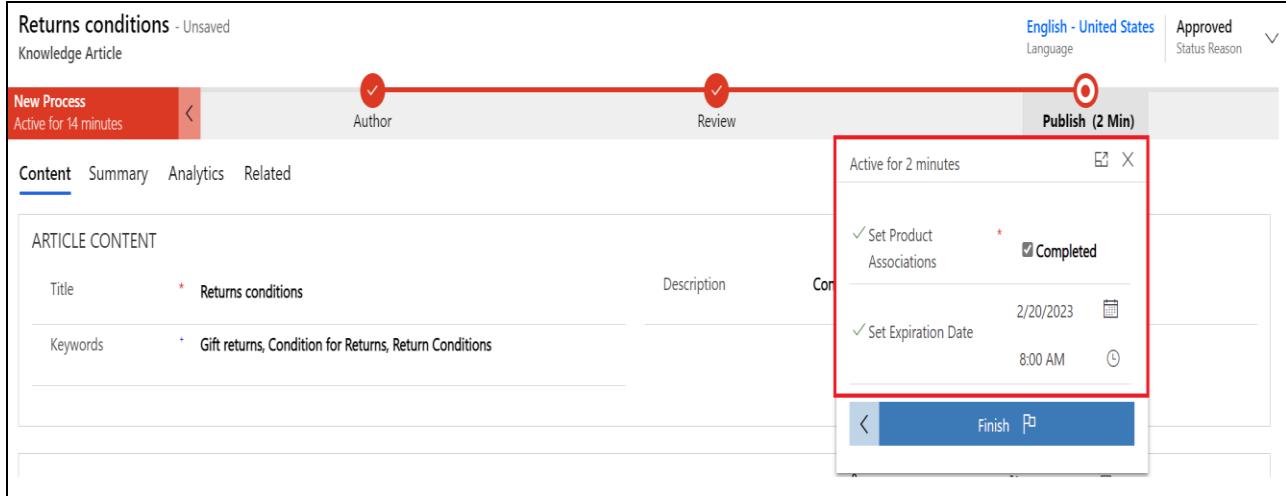


**Congratulations!** You have successfully reviewed and approved the knowledge article. We will show you how to publish the Knowledge Articles to be available during Omnichannel for Customer Service calls.

## 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.