Microsoft Cloud for Retail

in a Day

Lab 01: Seamless Customer Service

Step-by-Step Lab

90 minutes

February 2022

Contents

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:

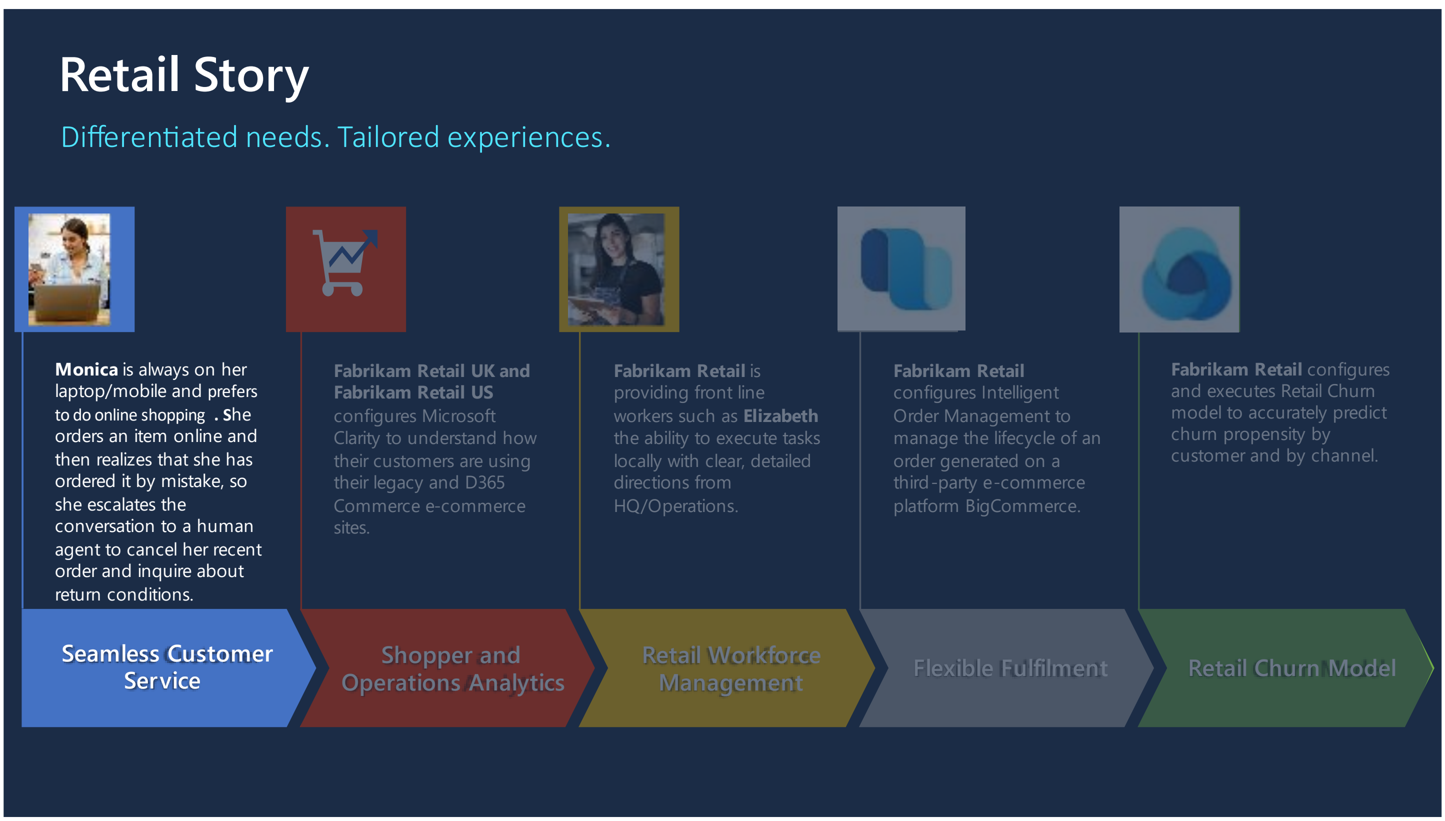
- Elevate agent effectiveness with tools such as giving the option to work across multiple open cases and utilizing Microsoft Teams to connect with subject-matters experts
- Utilize the Internet of Things (IoT) to send remote commands to resolve issues quickly and to identify devices in need of attention
- 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.

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:

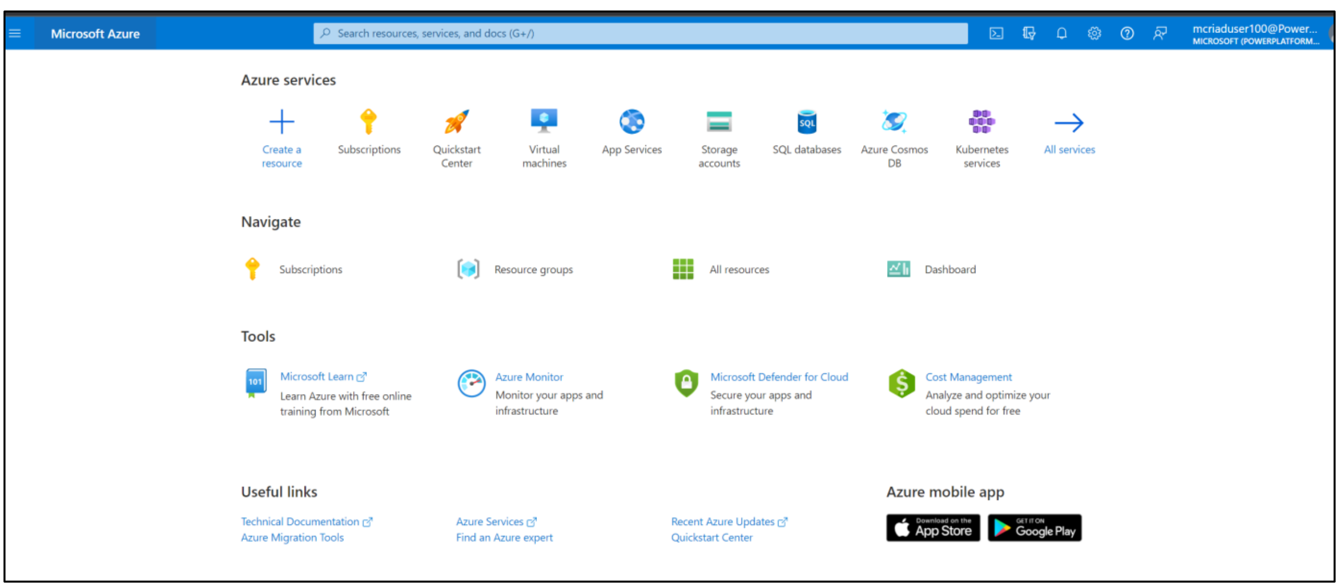
1. Create a Chat bot.
2. Integrate PVA with Omnichannel for Customer Service Instance.
3. Configure hand-off to Omnichannel for Customer Service.
4. Create a Custom Scenario.

Task 1: Register an application in AAD

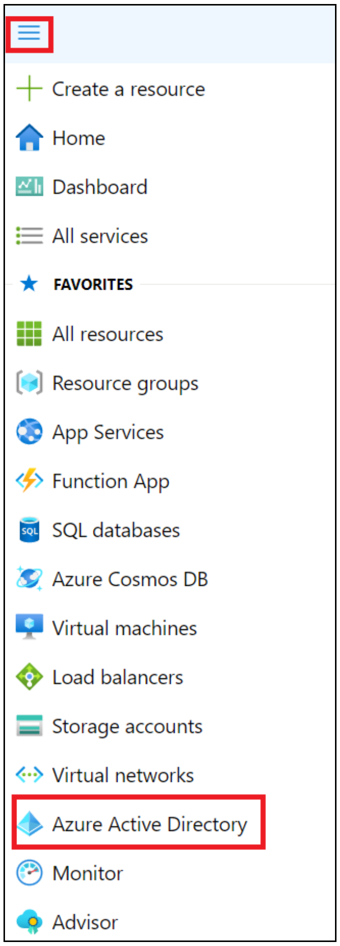
In this task, you will learn to create an application registration in AAD which will be used in Task 2 for Power Virtual Agent to connect with D365 Customer Service.

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.

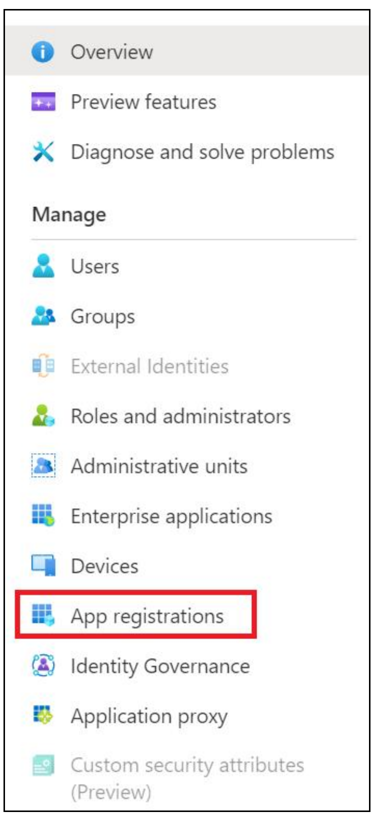
   ***Note**: If you are in instructor led training. Use the credentials provided by your instructor in the training information document.*



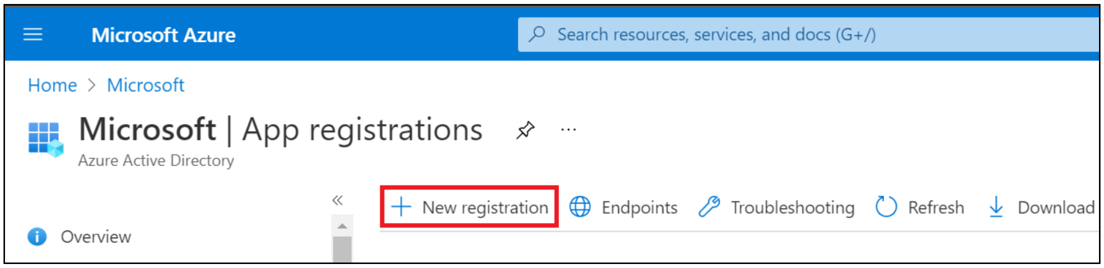
3. From the menu on the top left of the screen, select Azure Active Directory.



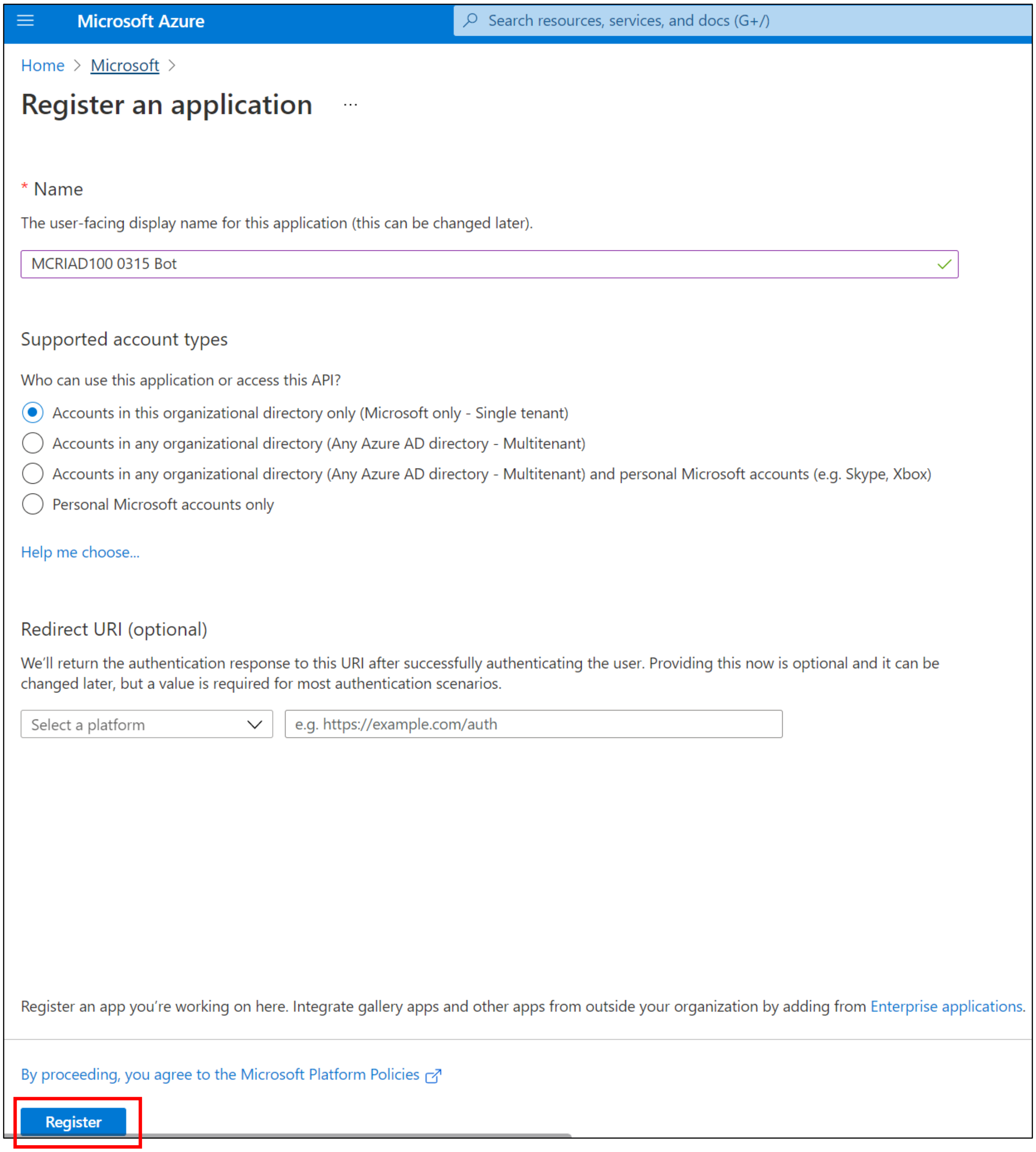
4. From the Azure Active Directory menu, select App registrations.



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



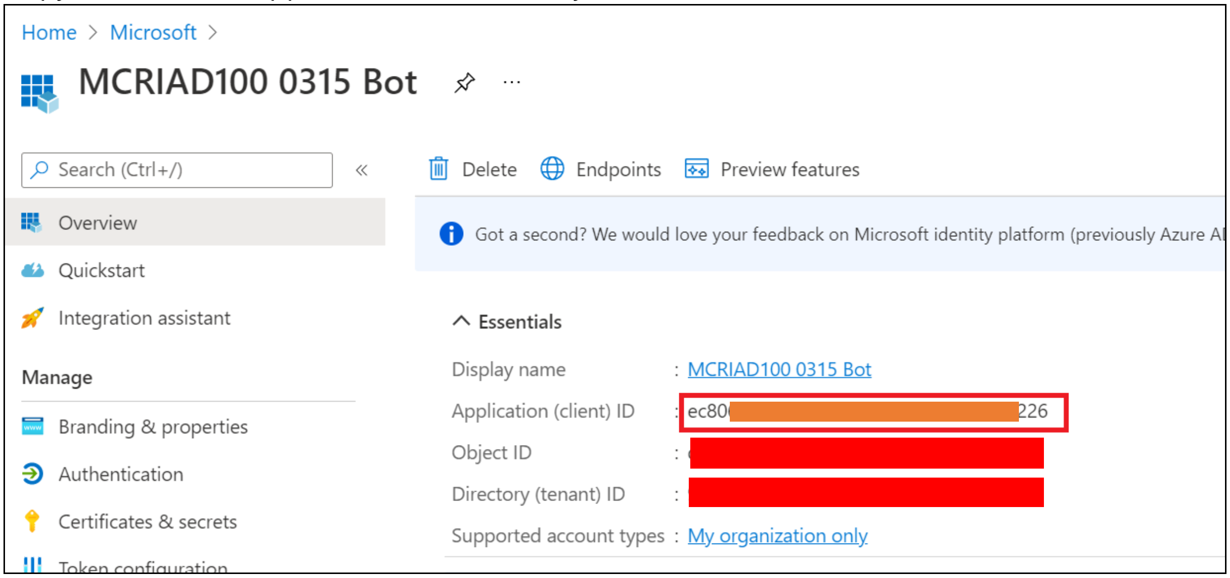
6. Enter a unique name for your app such as "**MCRIAD <<User Number>> <<MMDD>> Bot**". Remember the name of your App as you would it to identify it in the later exercises in this lab.



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.



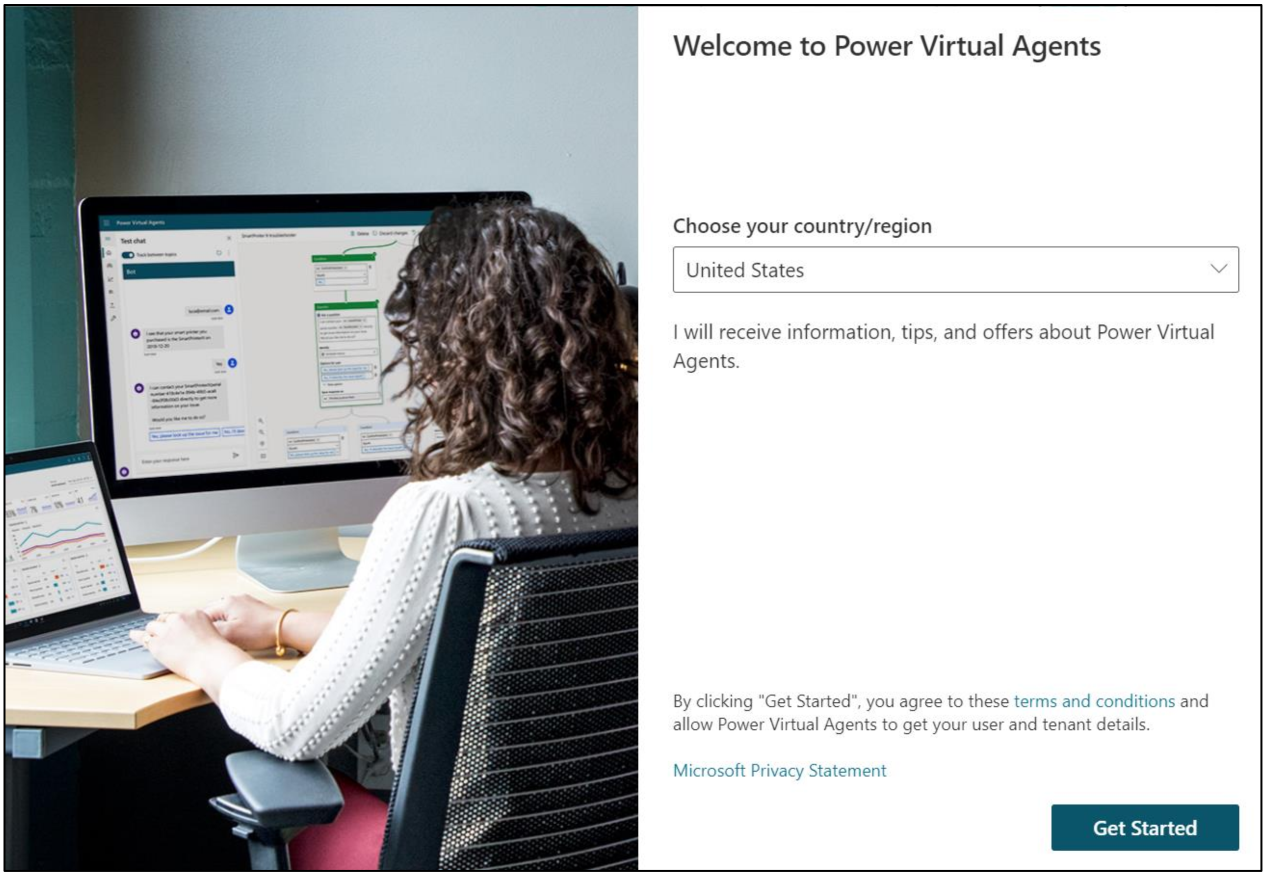
Congratulations! You have successfully created an Application in AAD.

Task 2: Create a Chat bot

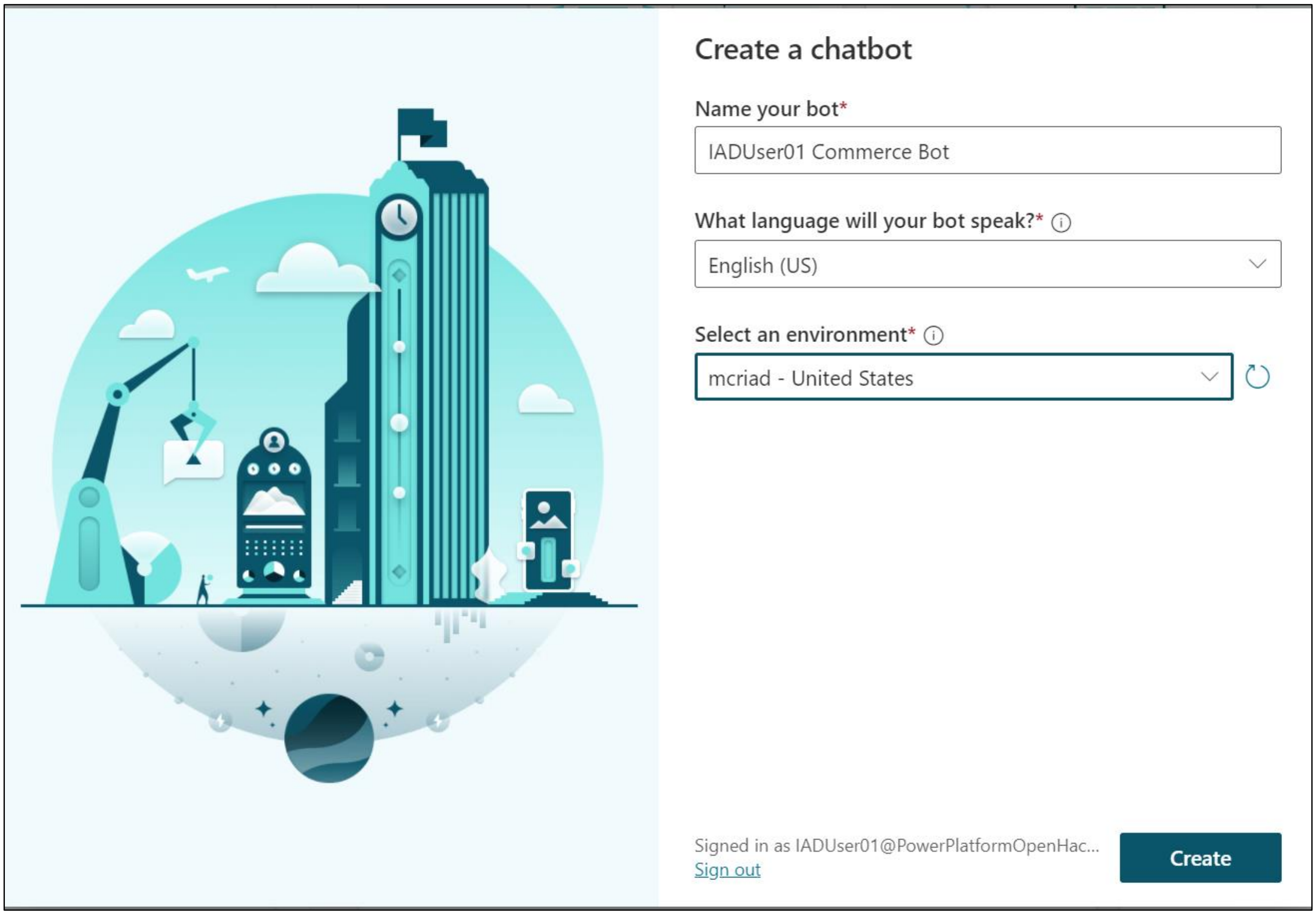
In this task, you will learn to create a new chat bot.

1. While in the In-Private or Incognito window, navigate to https://web.powerva.microsoft.com .
2. Sign-in with the credentials provided by your instructor.
   Note: *If you are in instructor led training. Use the credentials provided by your instructor in the training information document.*

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



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.*



5. Click **Create**.

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

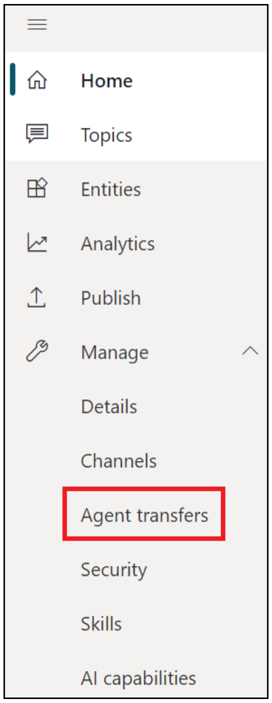
   Pro Tip: If you've created a bot in this environment before, to create another bot select the robot icon on the navigation bar, and then select New bot.

   Congratulations! You have created a new bot.

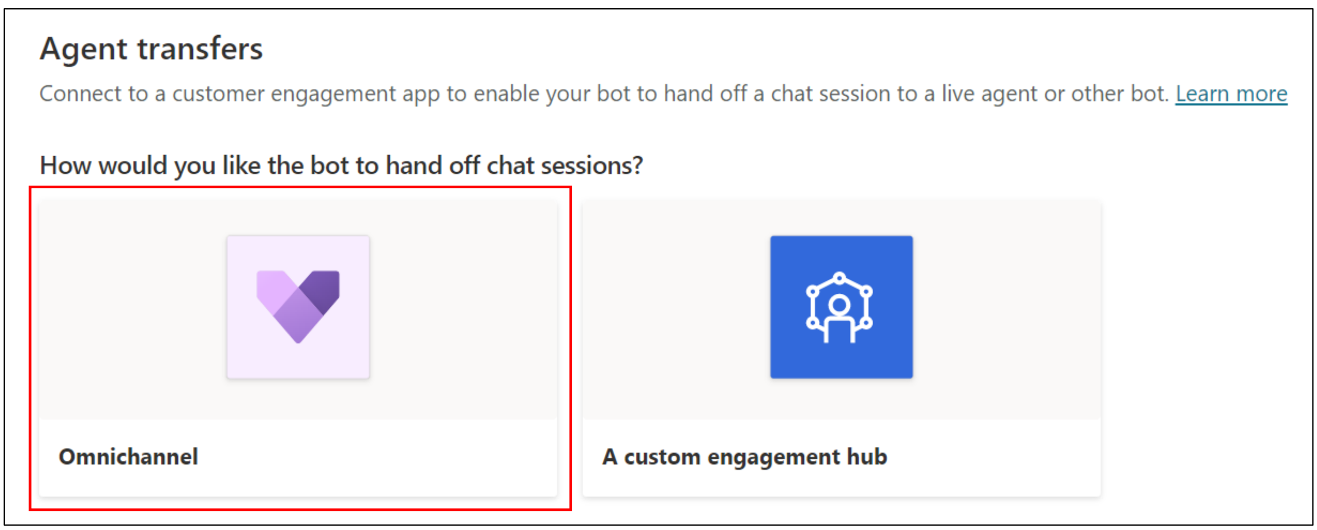
Task 3: Integrate PVA and Omnichannel for Customer Service

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

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

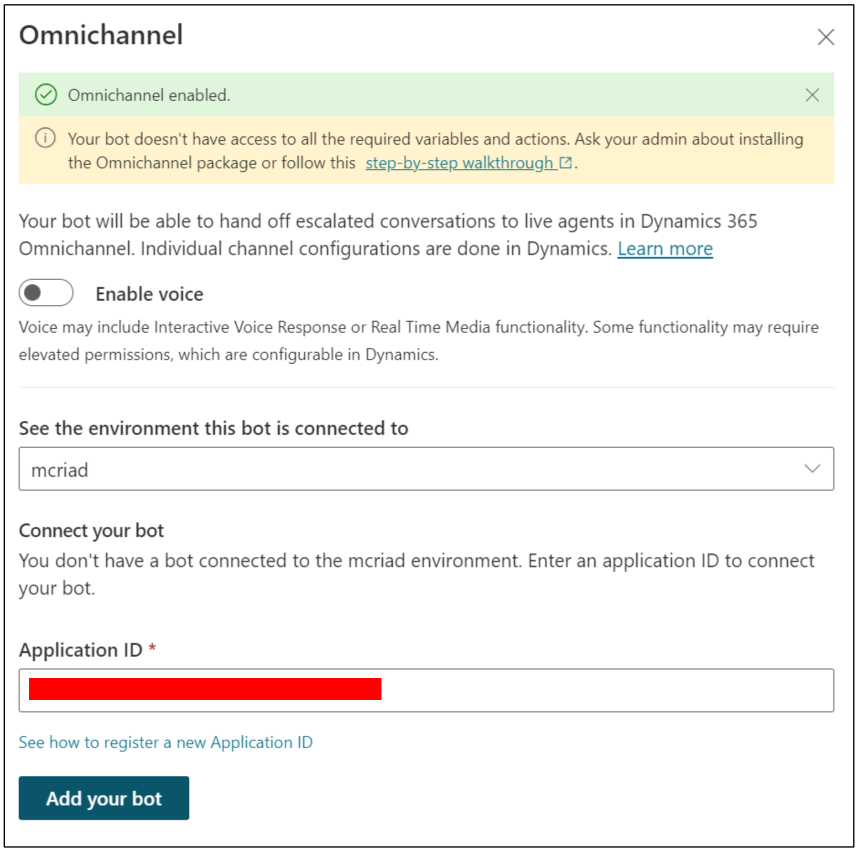


2. Select the **Omnichannel** tile.



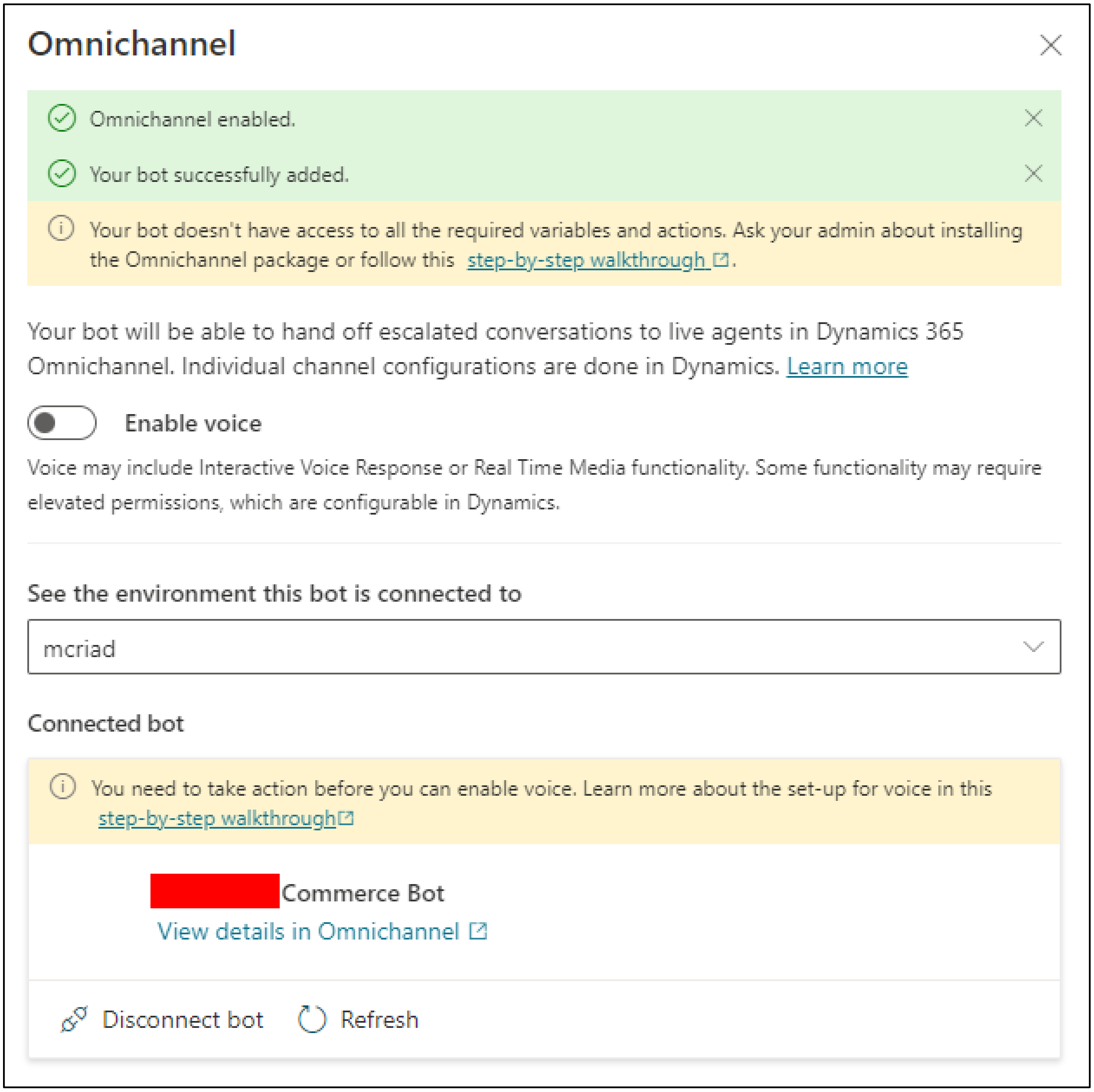
3. Select **Enable**.

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.



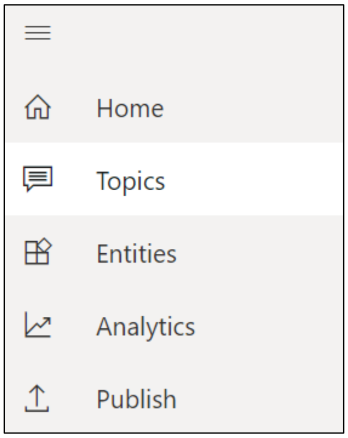
5. Close the Omnichannel form by selecting **X** on the top right edge of the form.

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

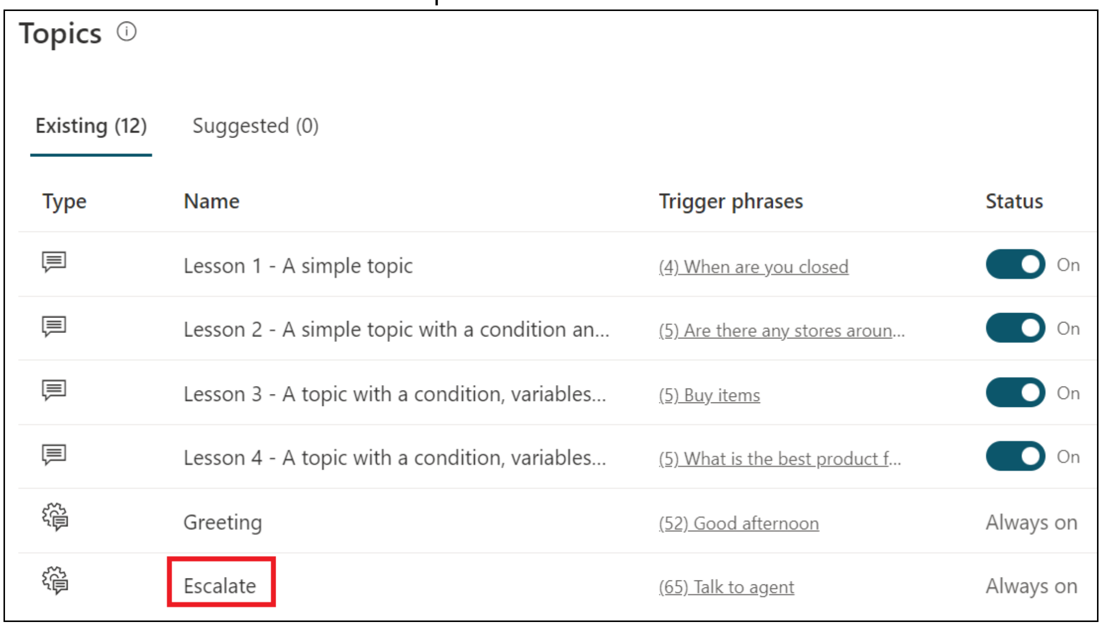
Task 4: Configure hand-off scenario

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**.

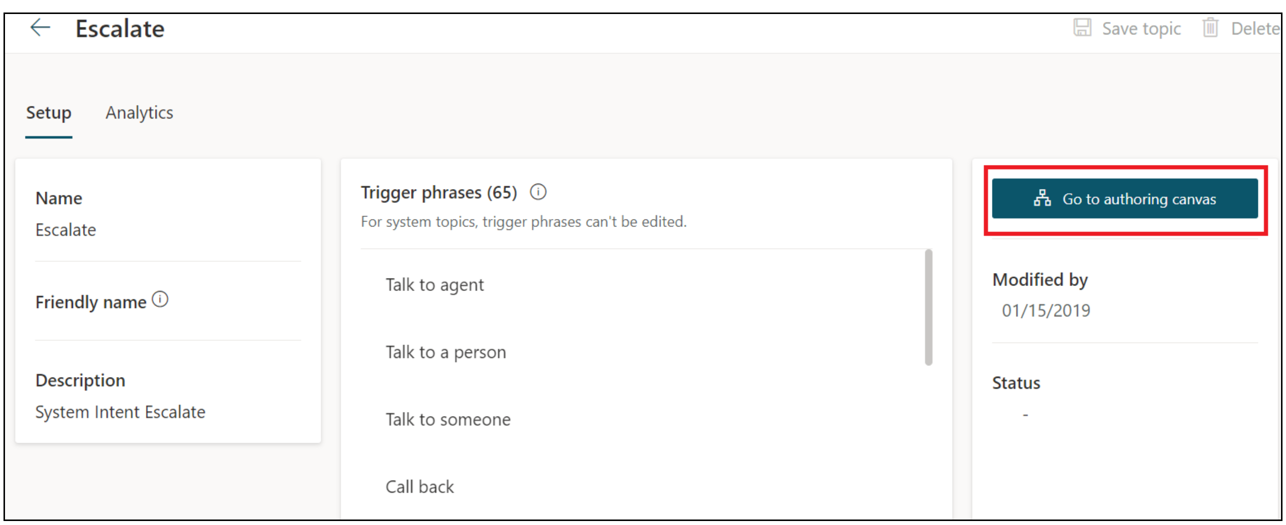


2. Select **Escalate** from the list of topics.



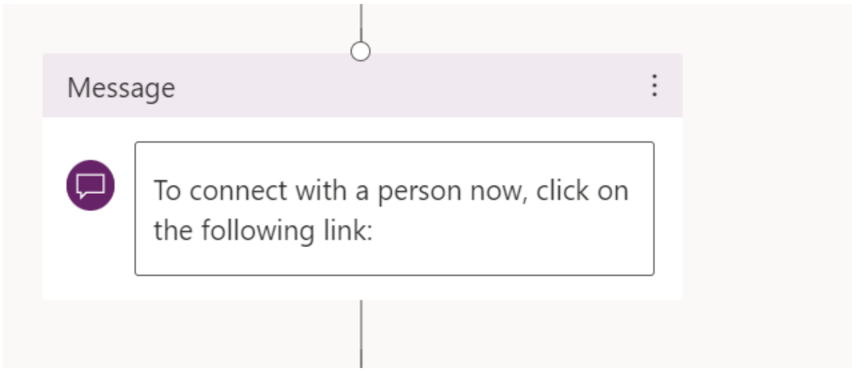
3. Select **Go to authoring canvas**.

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.

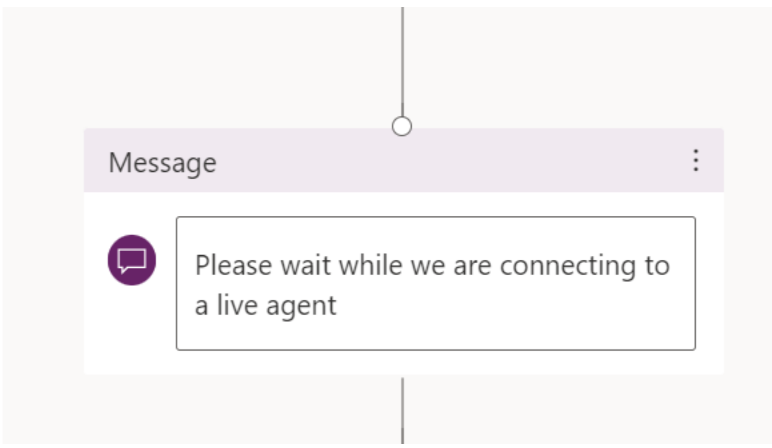


4. Change the statement in the message node to “Please wait while we are connecting to a live agent”

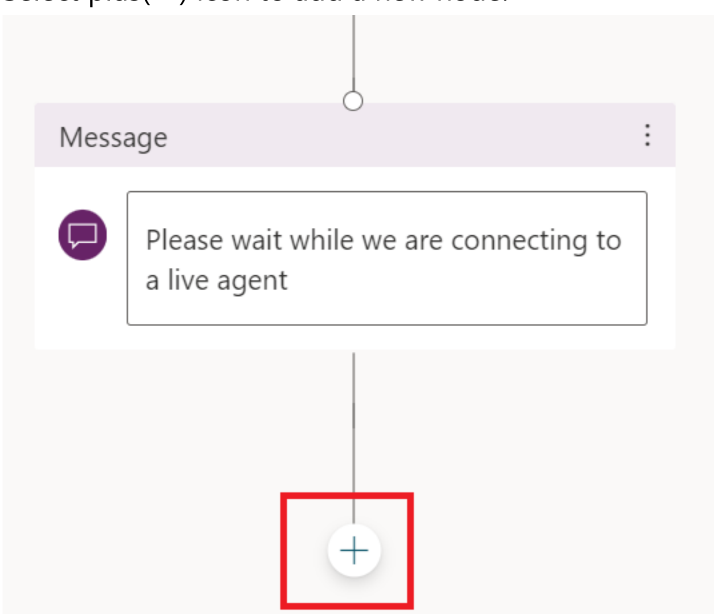
Original statement



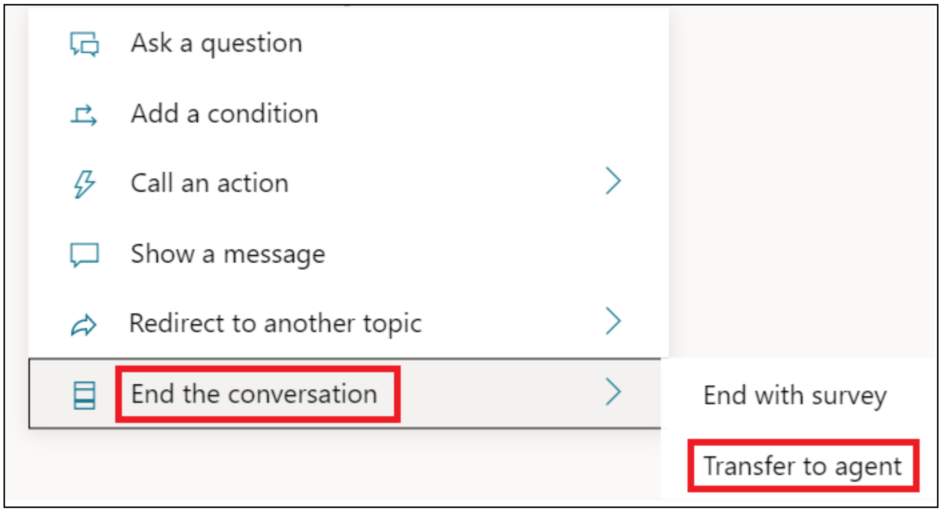
Updated Statement



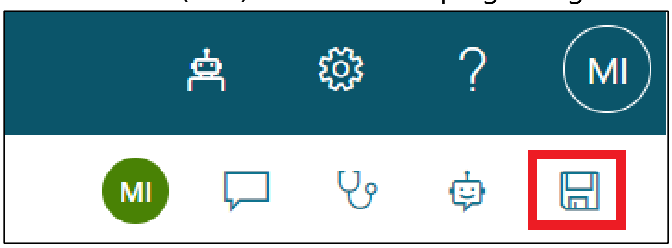
5. Select plus(+) icon to add a new node.



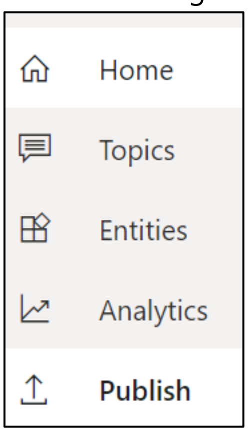
6. Select **End the conversation** and then select **Transfer to agent**.



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

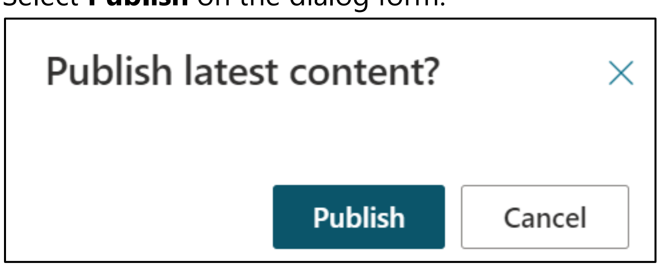


8. Once the changes have been saved, Select **Publish** on the left pane.



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.

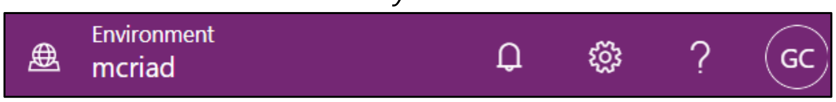
In the following tasks, you will complete the following:

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.

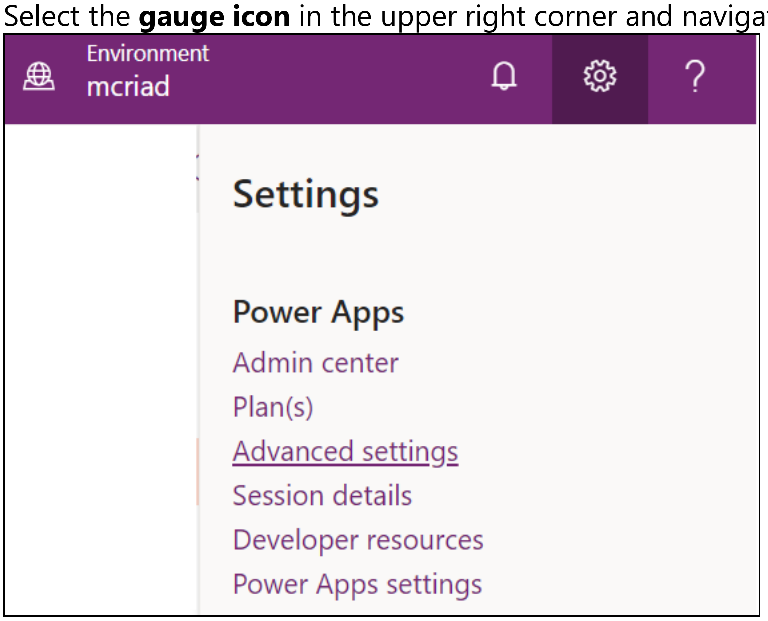
Task 1: Assign Omnichannel Agent Security Role

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.*

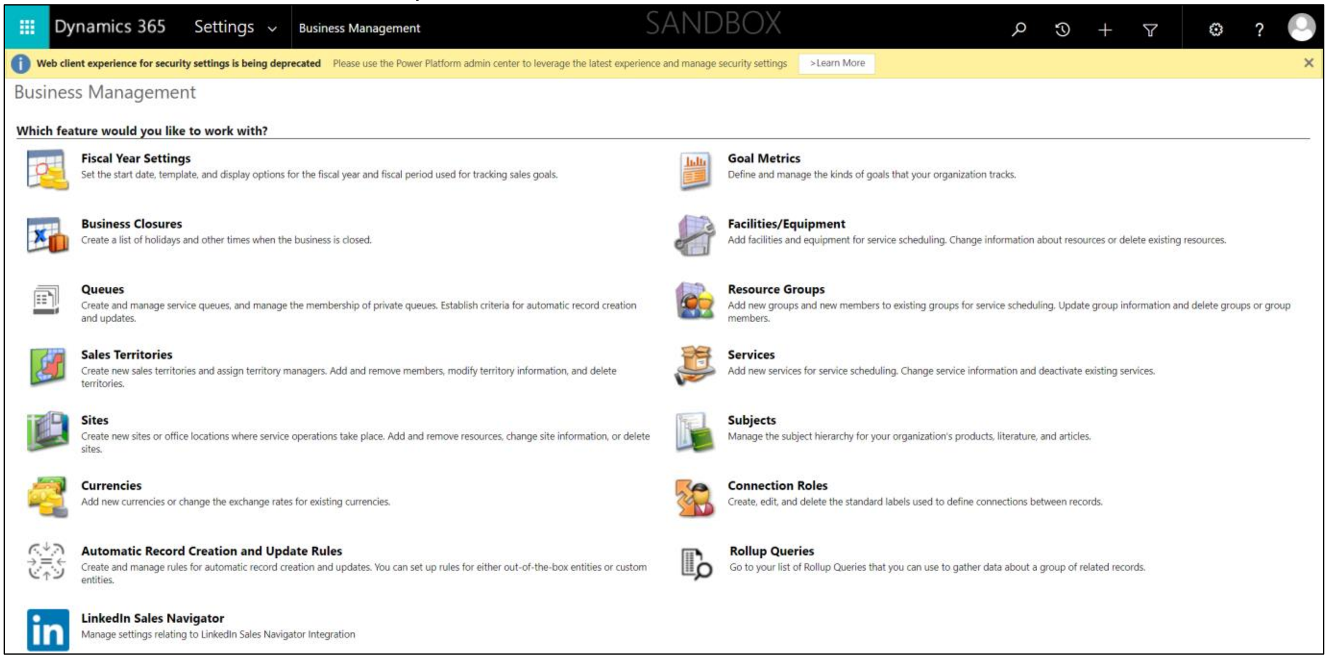


3. Select the **gauge icon** in the upper right corner and navigate to **Advanced Settings**.

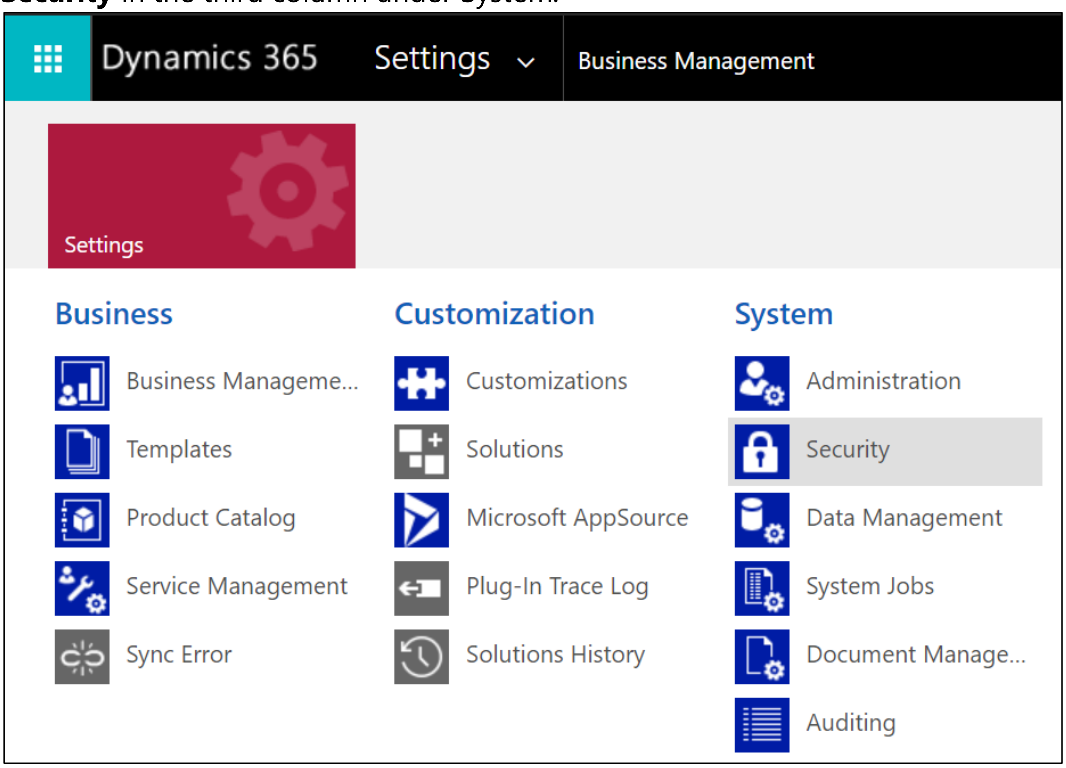


4. A new window should open and navigate to Dynamics 365. It will land you in the Business Management section of Dynamics 365.

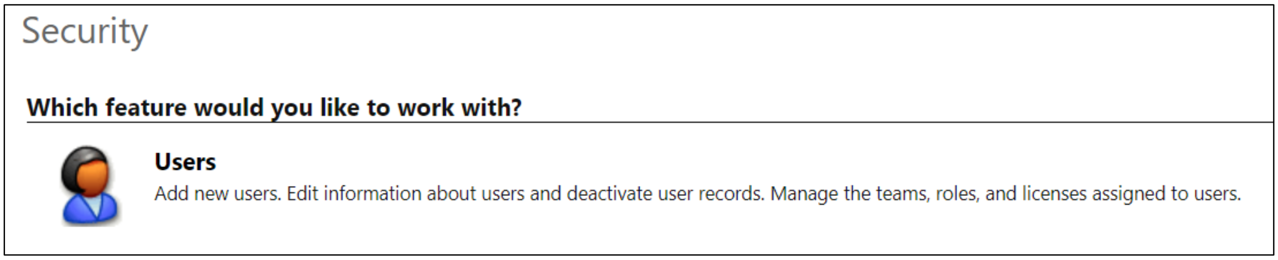
Note: It may take a while to load. If it's been longer than a minute, stop and reload the page. It should then load faster on second attempt.



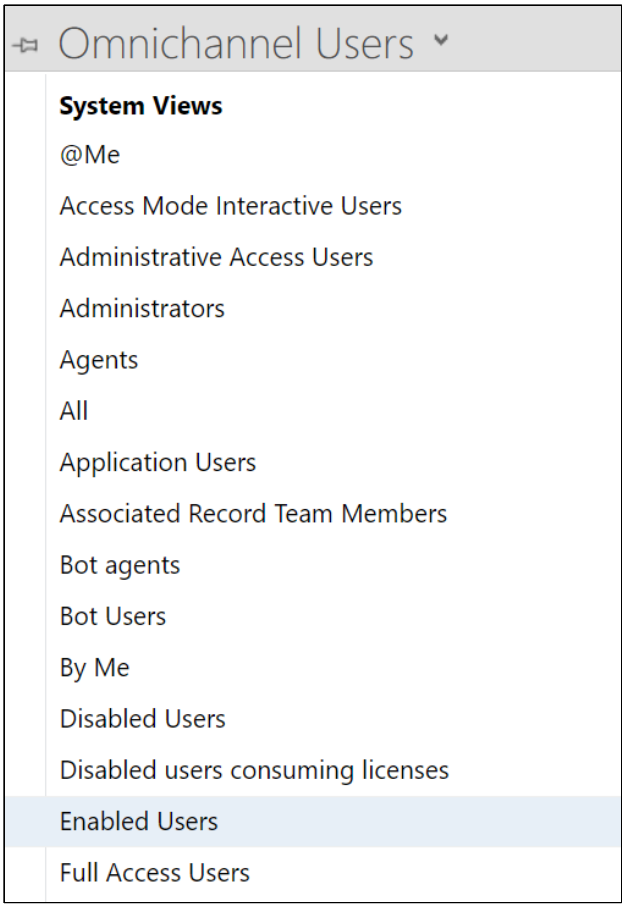
5. On the top command bar next to Dynamics 365, select **Settings** to open the drop-down, then select **Security** in the third column under System.



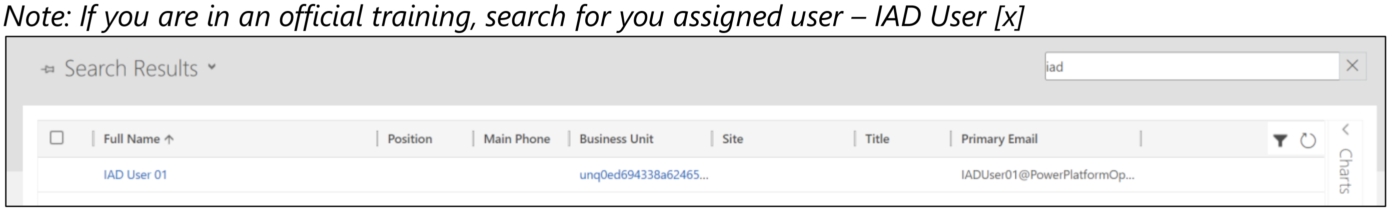
6. Under Security, select **Users**.



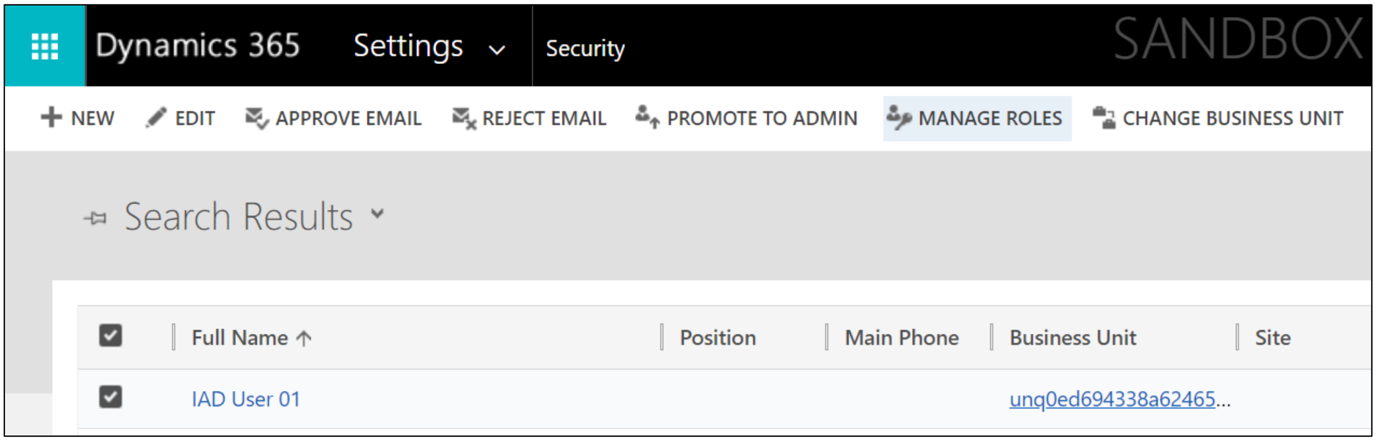
7. Switch the view drop down from Omnichannel Users to **Enabled Users** for the grid view so that your user will show in the list.



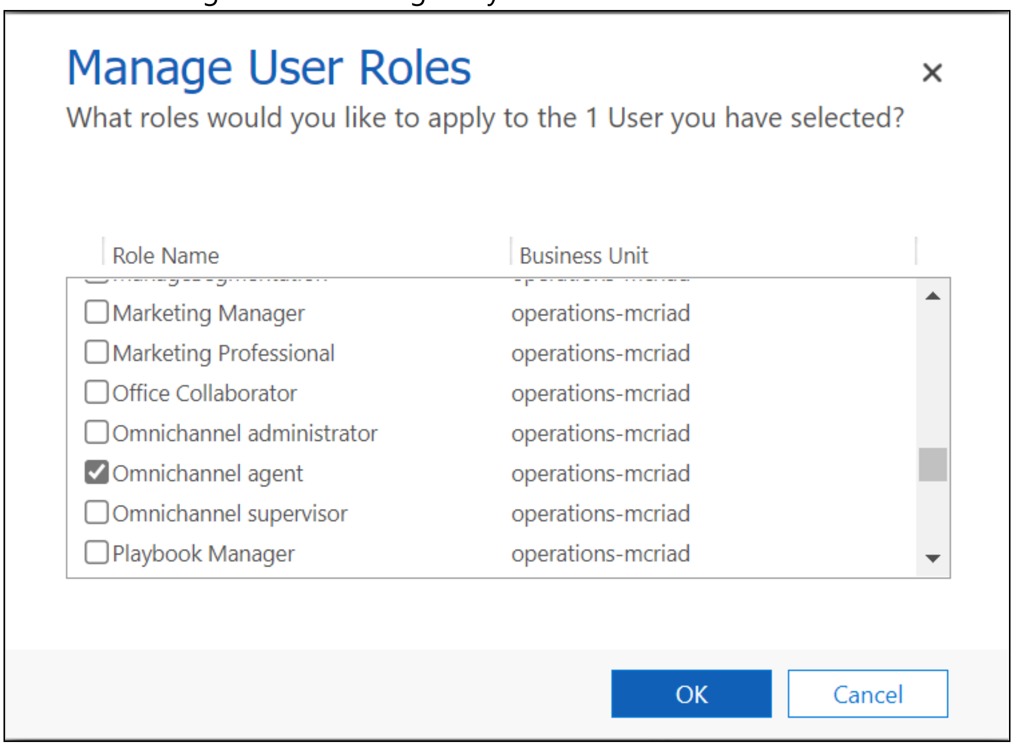
8. While in the Enabled User list, scroll to **find your user** or use the **Search** bar.
Note: If you are in an official training, search for you assigned user – IAD User [x]



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



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**.

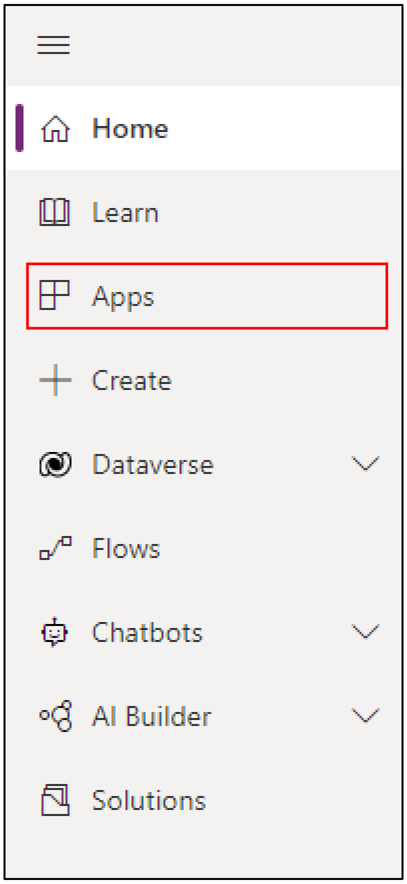


Congratulations! You assigned the proper omnichannel agent role to your user to allow you to be a live agent in omnichannel.

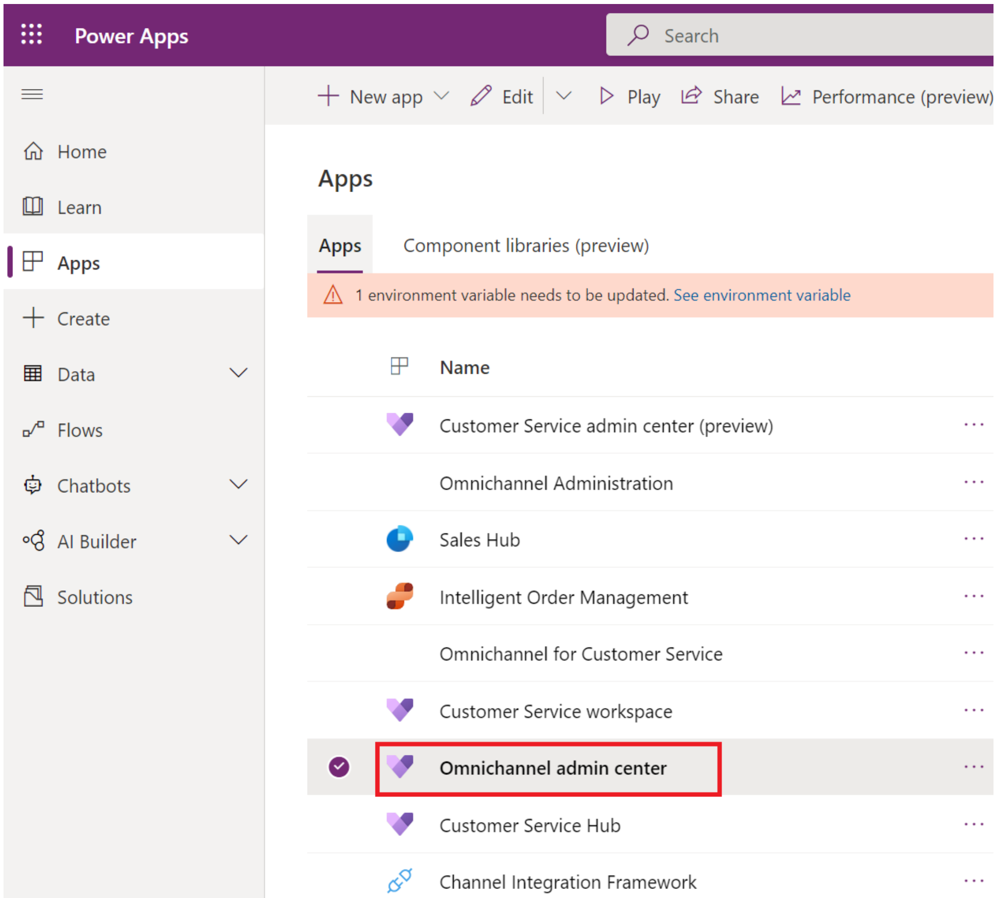
Task 2: Create and Configure Omnichannel Queues

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

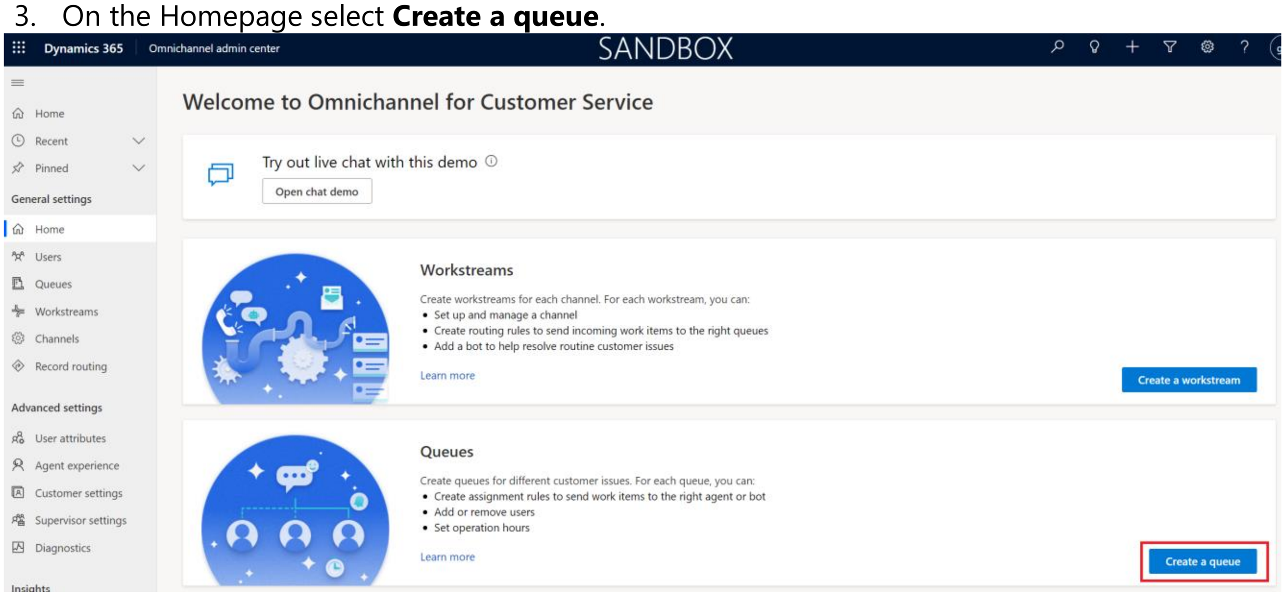
1. In http://make.powerapps.com, Select on Apps on Left Navigation Bar



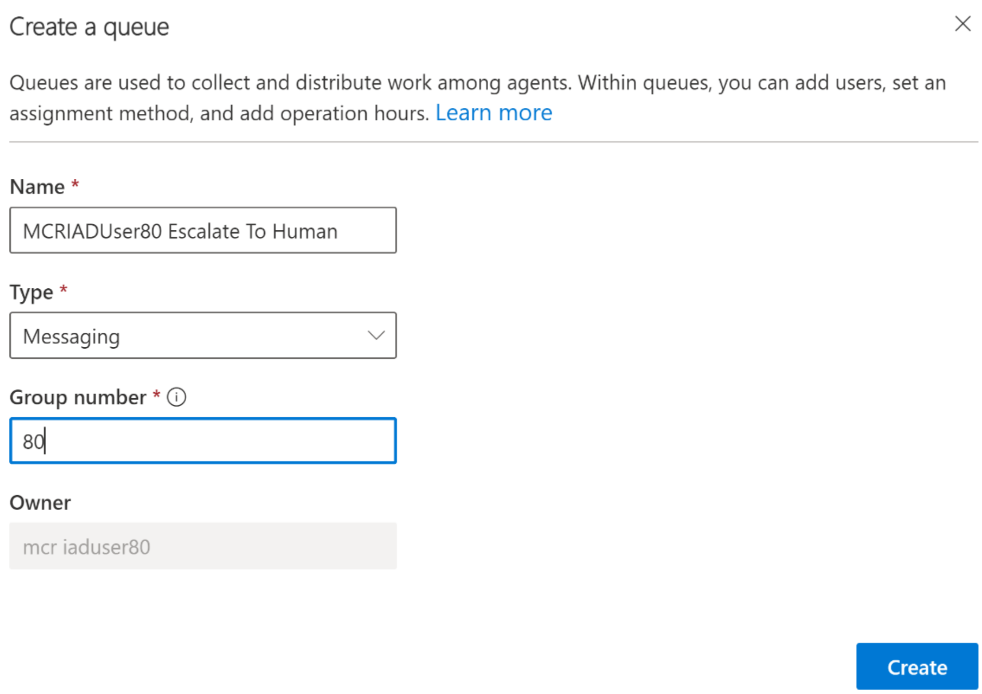
2. Open the **Omnichannel admin center** app.



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



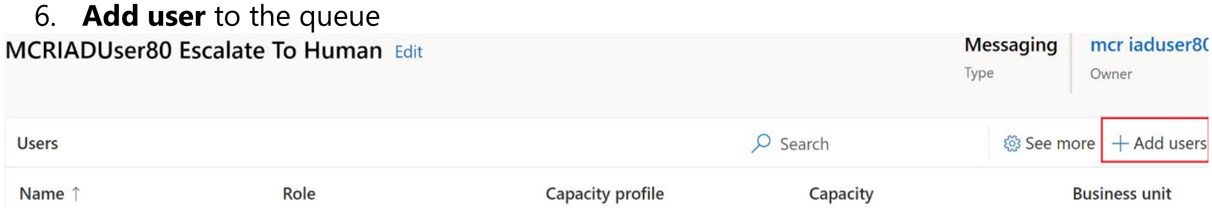
4. Create a new Queue with the following details:
   a. **Name**: <<UserName>> “Escalate To Human”
   b. **Type:** Messaging
   c. **Group number**: <<user number>> example:80
   d. Click **Create**.



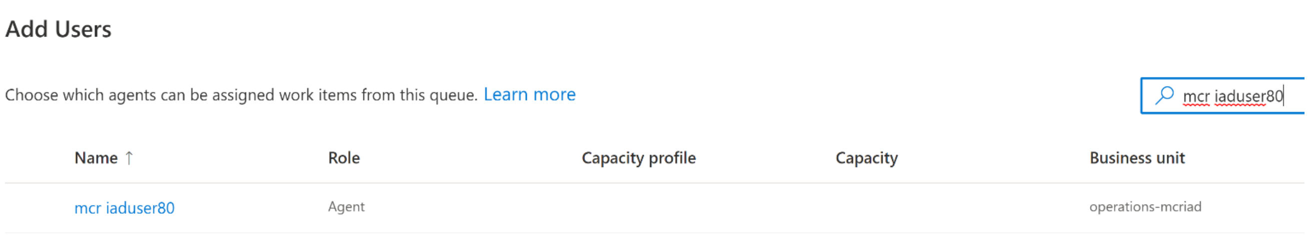
5. A Users (Agents) **subgrid should appear** on the right and your **user should be automatically added** to the list. If your user account is not on the list, add it through the Add Existing User button now.

   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.

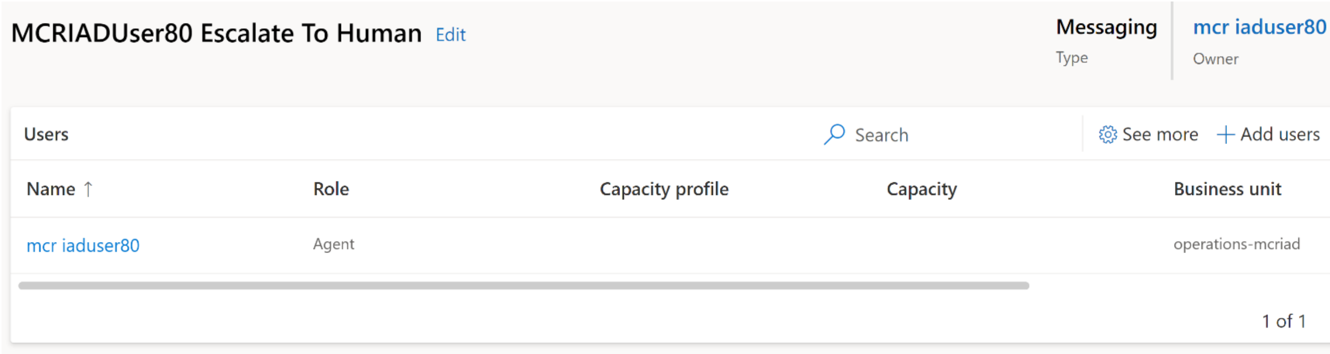
6. **Add user** to the queue



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



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



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

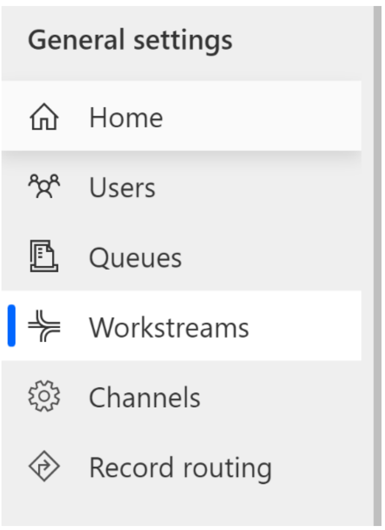
Task 3: Create a Live Work Stream with Context Variables and Routing Rules

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:

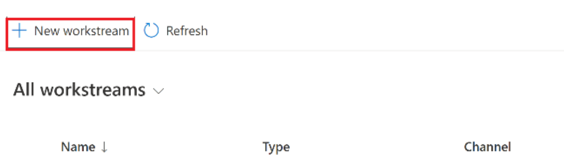
- **Route to Bot:** Initial customer conversation is through PVA Bot in the default messaging queue. When the chat bot is first opened, route to Bot which only contains the bot user (agent).

- **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.

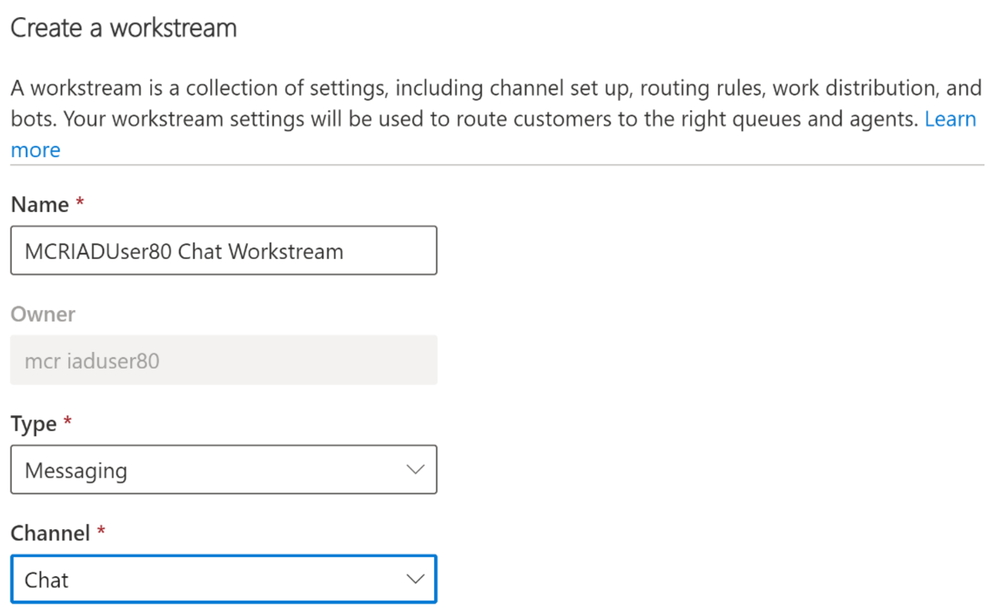
1. Navigate to **Work Streams.**



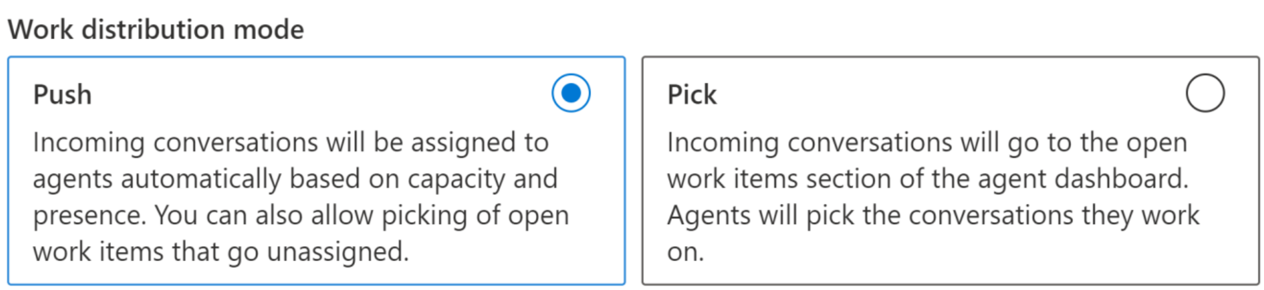
2. Select **+ New workstream** to create a new workstream.



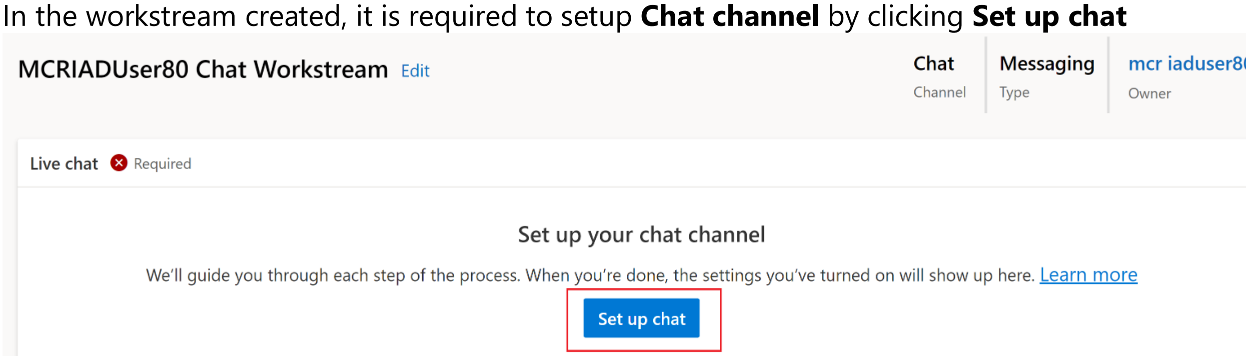
3. Enter the following details in the workstream below:
    a. **Name**: <<UserName>> “Chat Workstream”
    b. **Type** : Messaging
    c. **Channel**: Chat



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



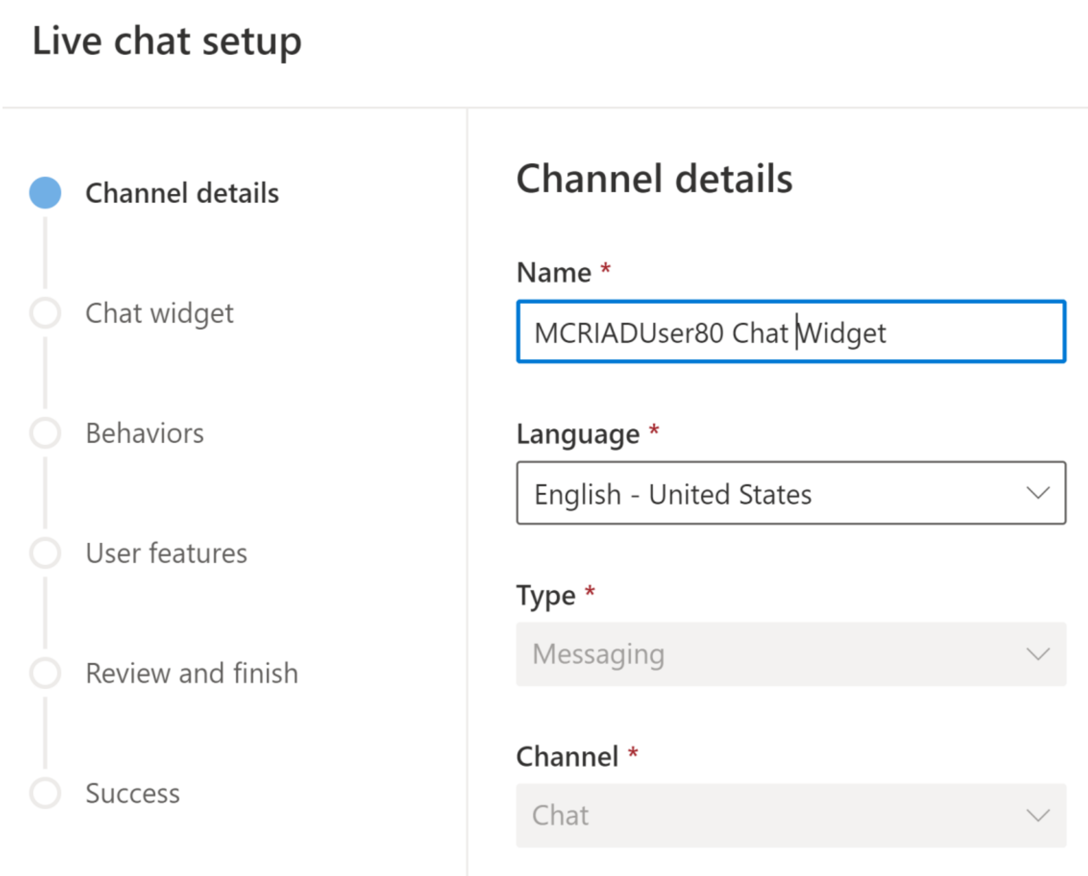
5. In the workstream created, it is required to setup **Chat channel** by clicking **Set up chat**



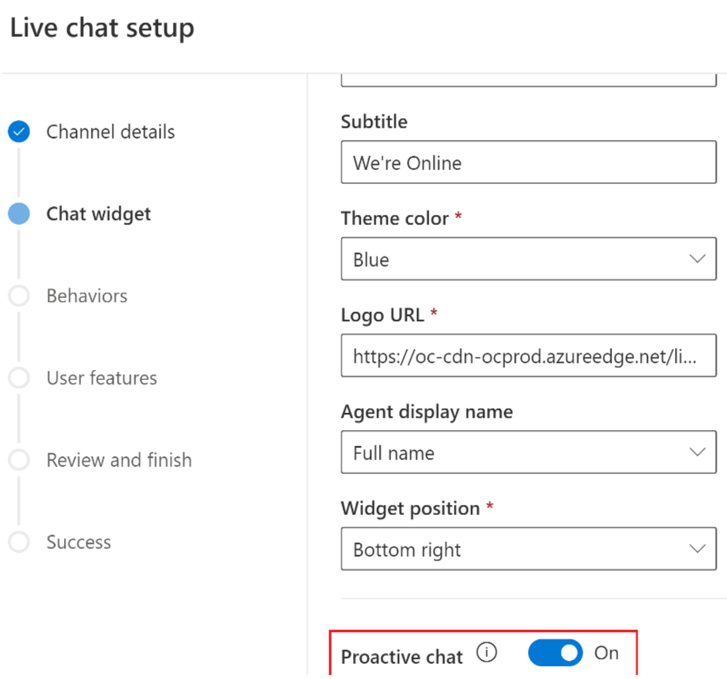
6. Setup a **Live Chat** pop-up opens as below

   Name: <<user name>> Chat widget

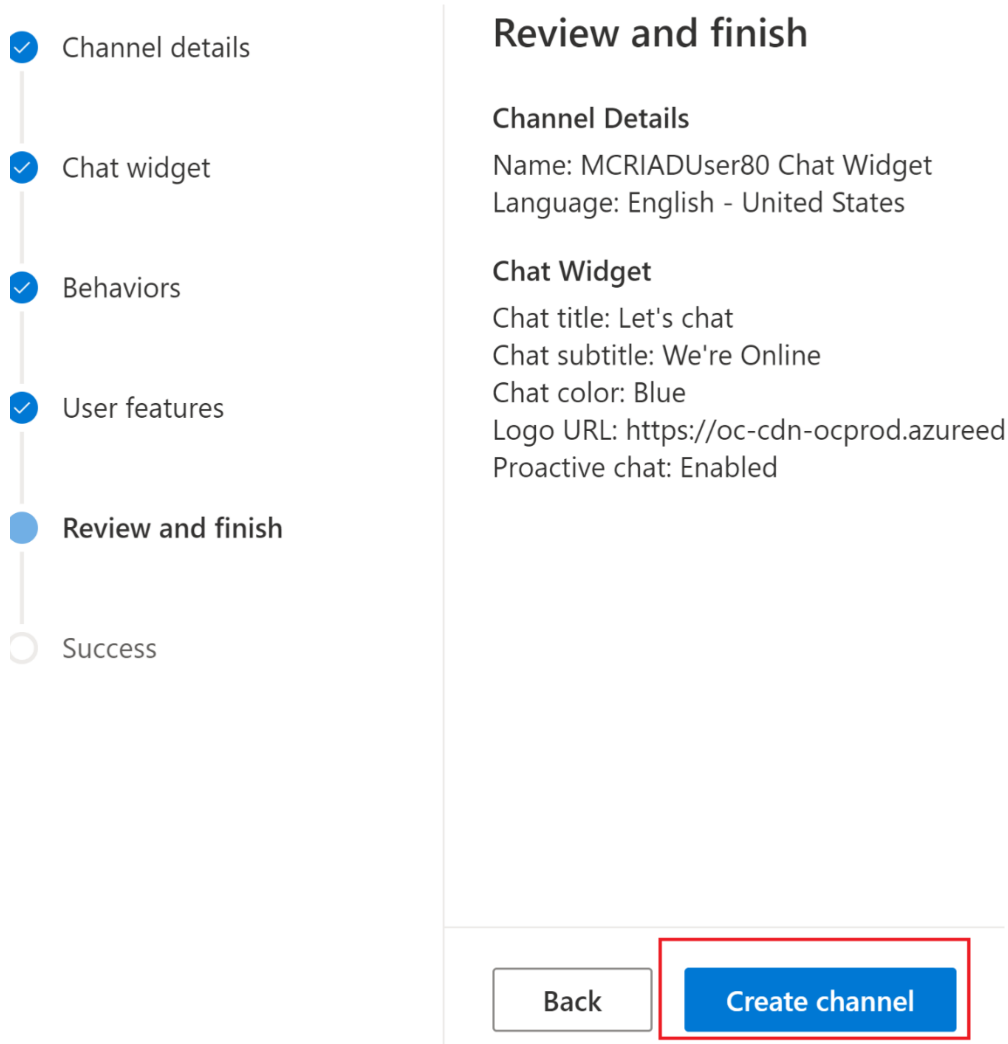
   Language : English-United states



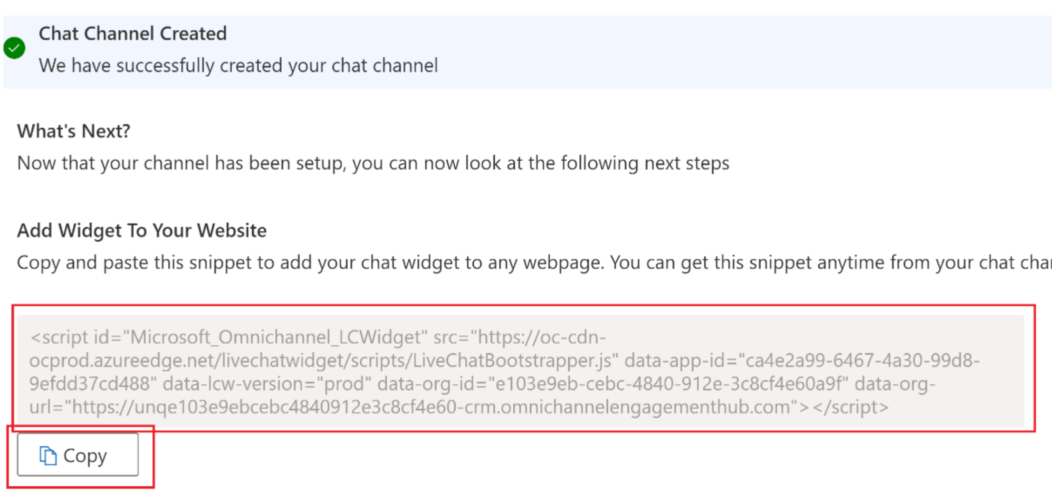
7. Enable **Proactive chat**



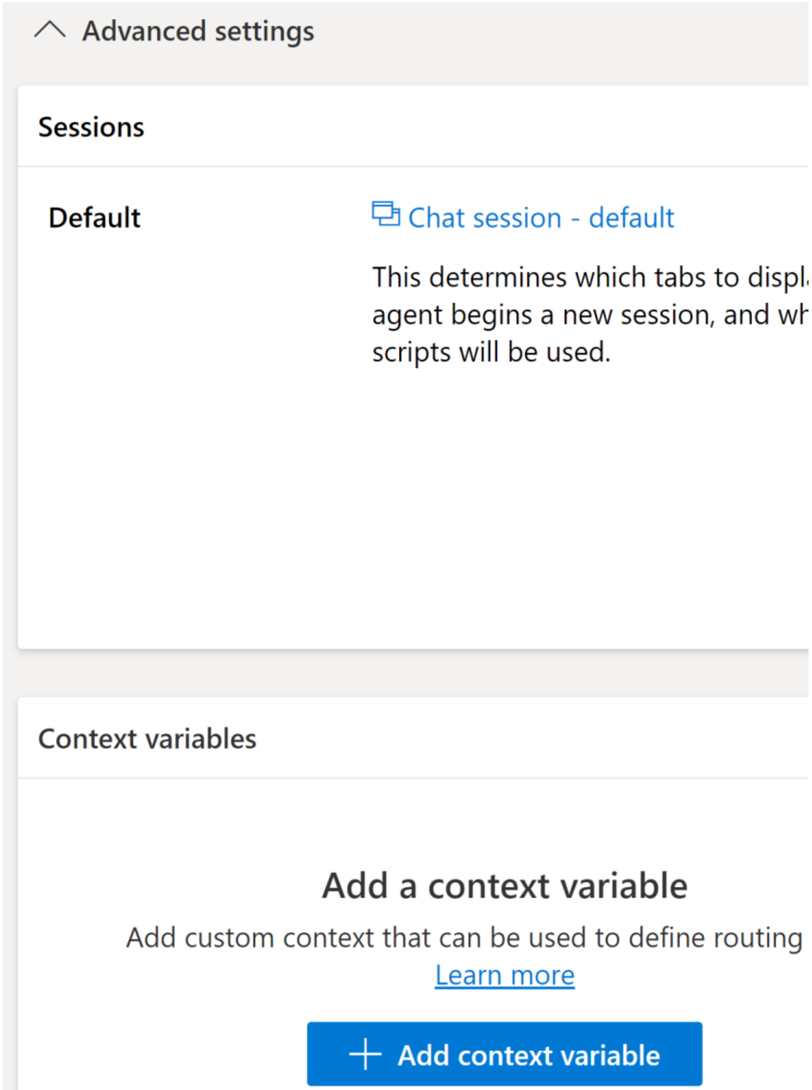
8. Click **Next** and continue through the steps to review and **Create channel**



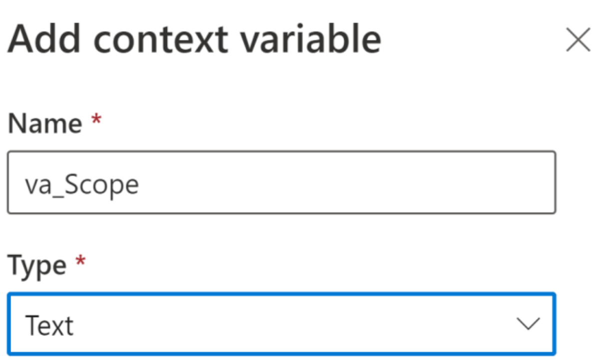
9. Make sure to copy the script of the chat widget and save it as it will be required in the next exercise later



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



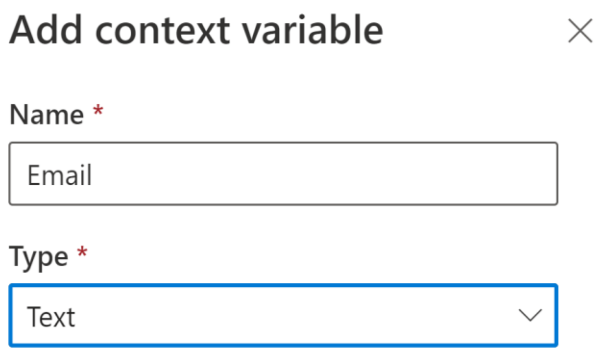
11. Create the new Context Variable with the following details:
    a. **Name:** va_Scope
    b. **Type:** Text



12. Click **Save and Close**.
13. Again in the your **chat workstream** record, select the **Add Context Variables** tab.

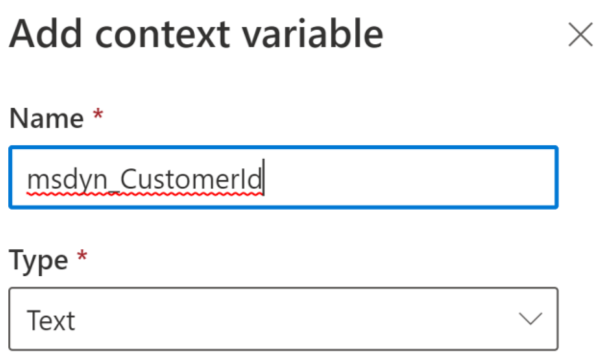
14. Create the new Context Variable with the following details:

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



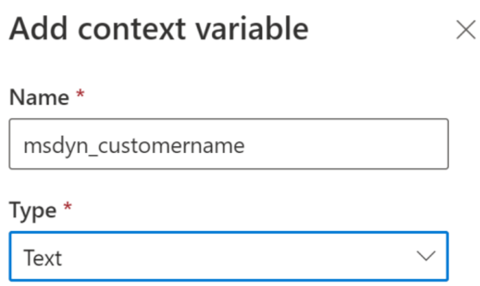
15. Click **Save and Close**.
16. Again in your **chat workstream** record, select the Add **Context Variables** tab.

17. Create the new Context Variable with the following details:
    a. **Name:** msdyn_CustomerId
    b. **Type:** Text

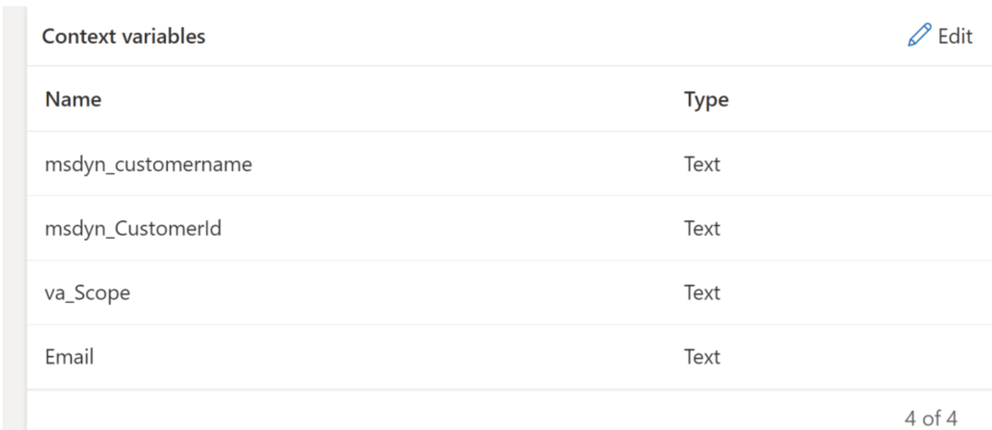


18. Click **Save and Close**.
19. In the **chat workstream** record, select the **Context Variables** tab and add.

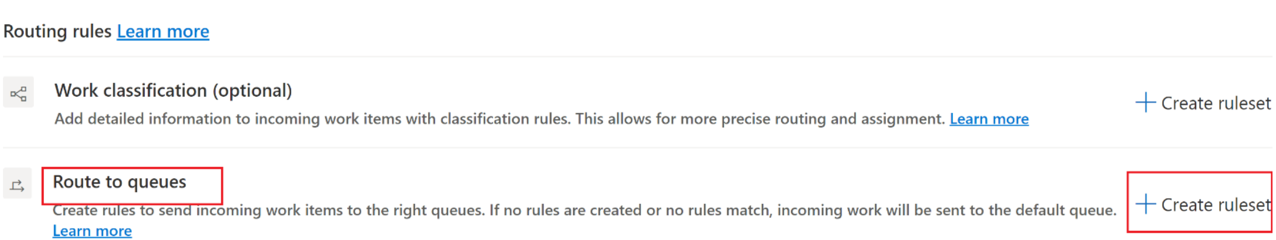
20. Create the new Context Variable with the following details:
    a. **Name:** msdyn_CustomerName
    b. **Type:** Text



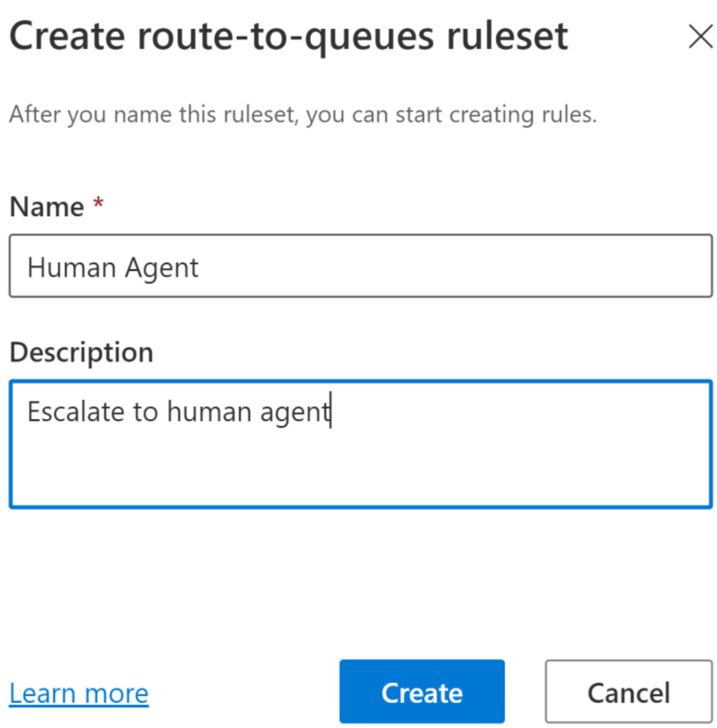
21. Click **Save and Close**.
22. You should now see the four new Context Variable in your chat workstream.



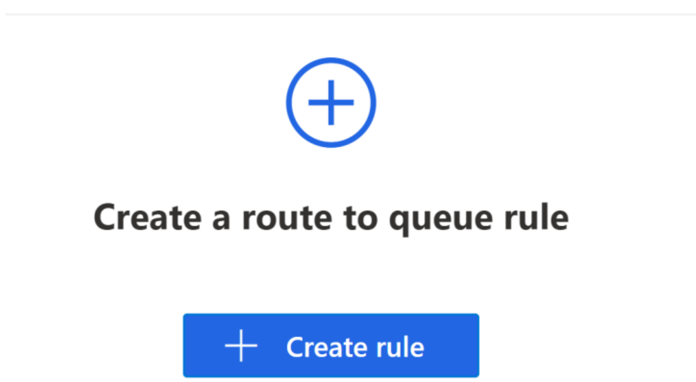
23. Now we will create Routing Rules to direct the incoming chat requests to Queue.
24. Scroll to the **Routing Rules** tab in the workstream, Click **Create ruleset** under **Route to queues**



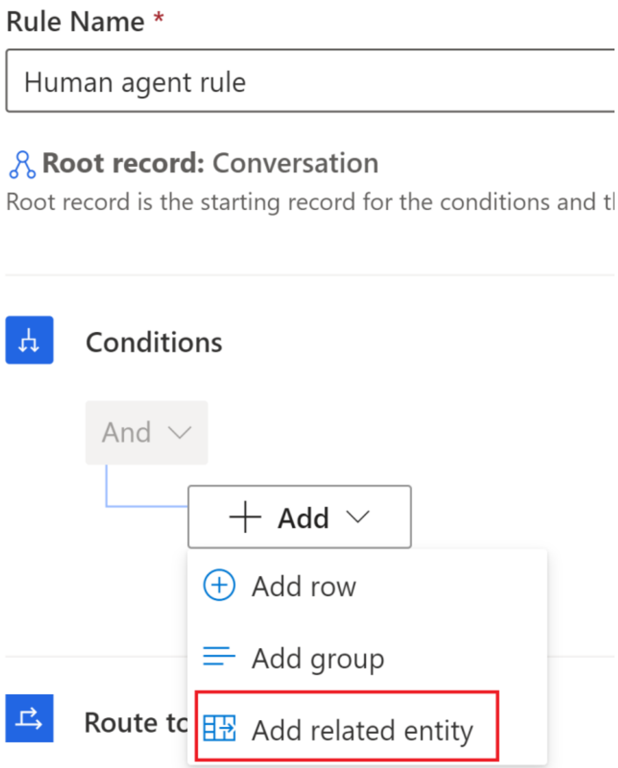
25. Create route-to-queues ruleset
    Name : Human agent
    Description : Escalate to human agent



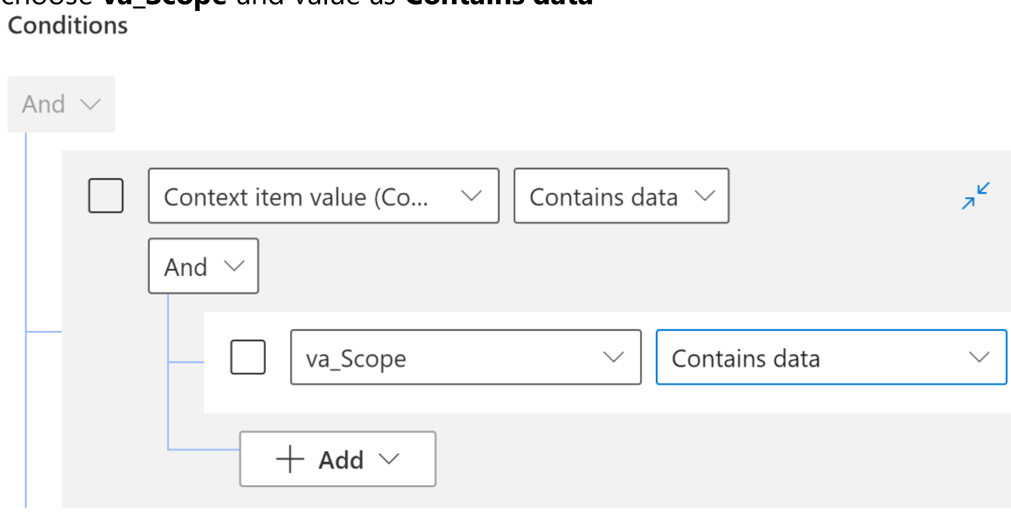
26. Create a **route to queue Rule**



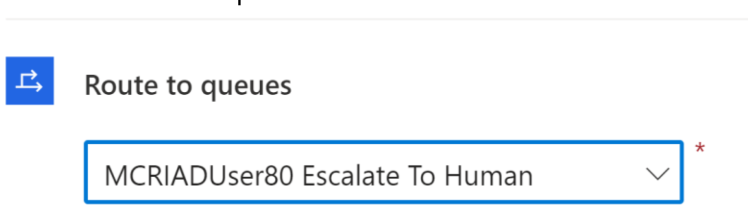
27. Create rule condition , choose **"Add related entity"**
    Rule name : Human agent rule



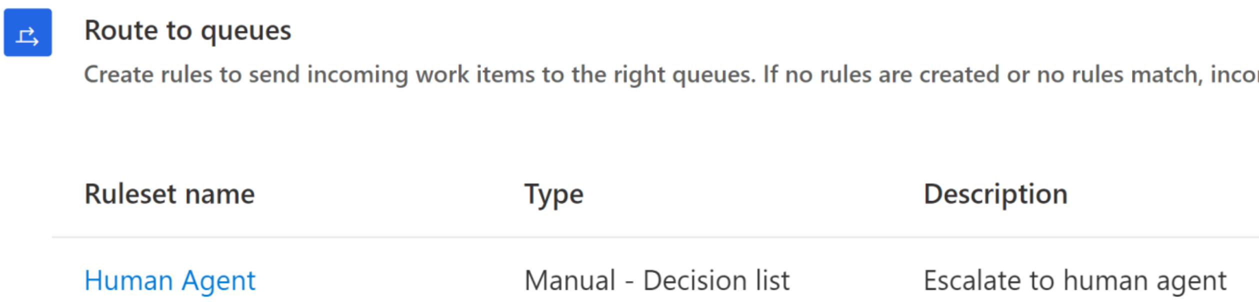
28. Configure rule condition , choose **Context item value** and **Contains data.** In the inline condition choose **va_Scope** and value as **Contains data**



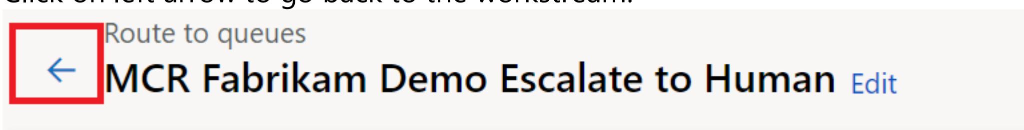
29. Choose Route to queue name as "<<Username>> Escalate to Human " queue created in task 2 -point 4



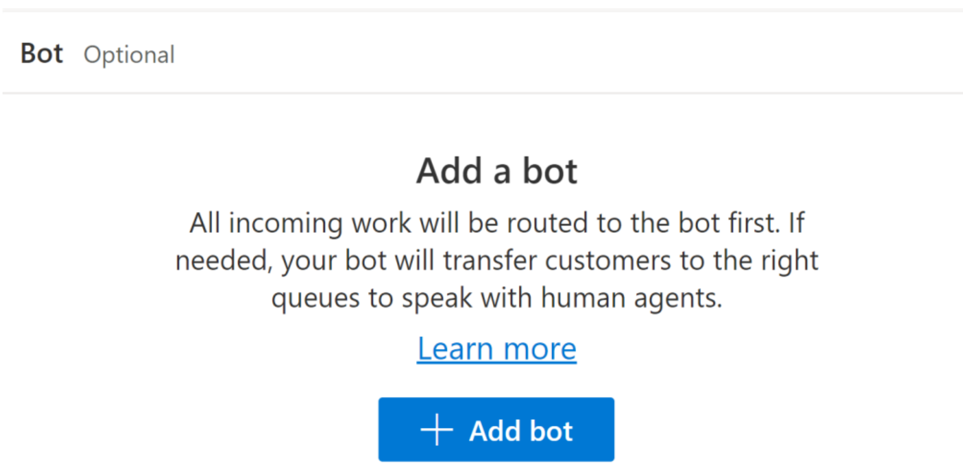
30. Once configured the rule set is shown as below



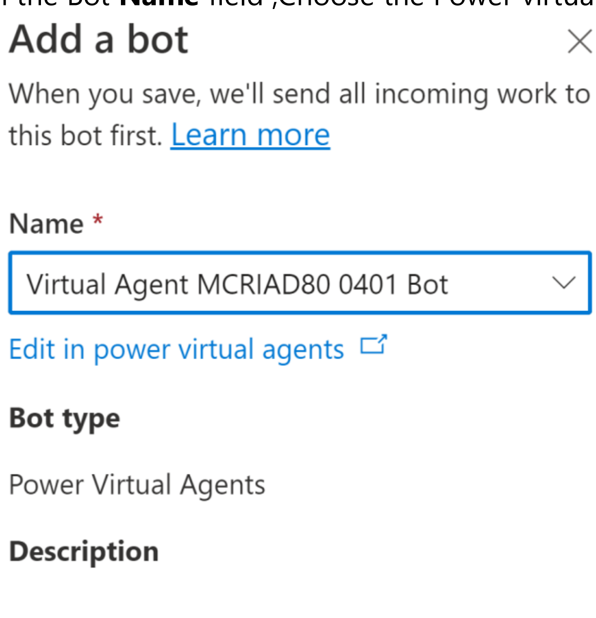
31. Click on left arrow to go back to the workstream.



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



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



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**.

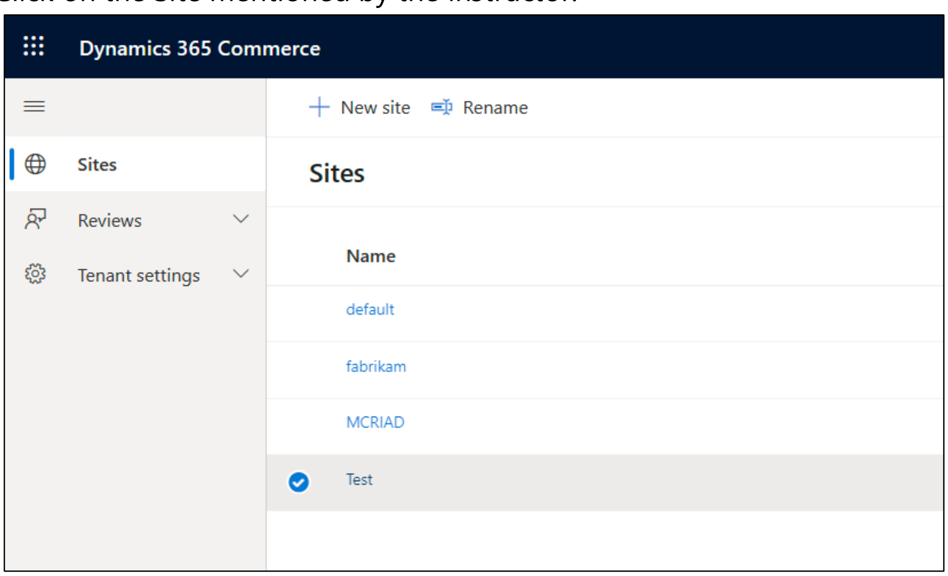
If you'd like to learn more about e-Commerce site, check out Microsoft Docs: [E-commerce site overview - Commerce | Dynamics 365 | Microsoft Docs]

Task 1: Create a site page

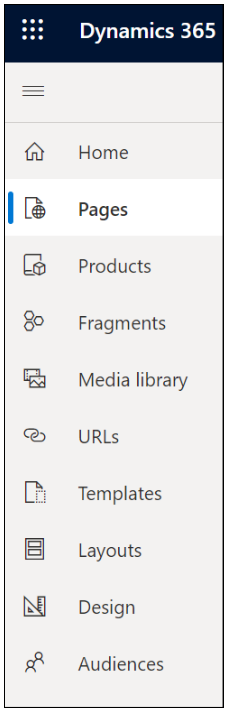
In this task, you will learn the steps to duplicate a site page.

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.*

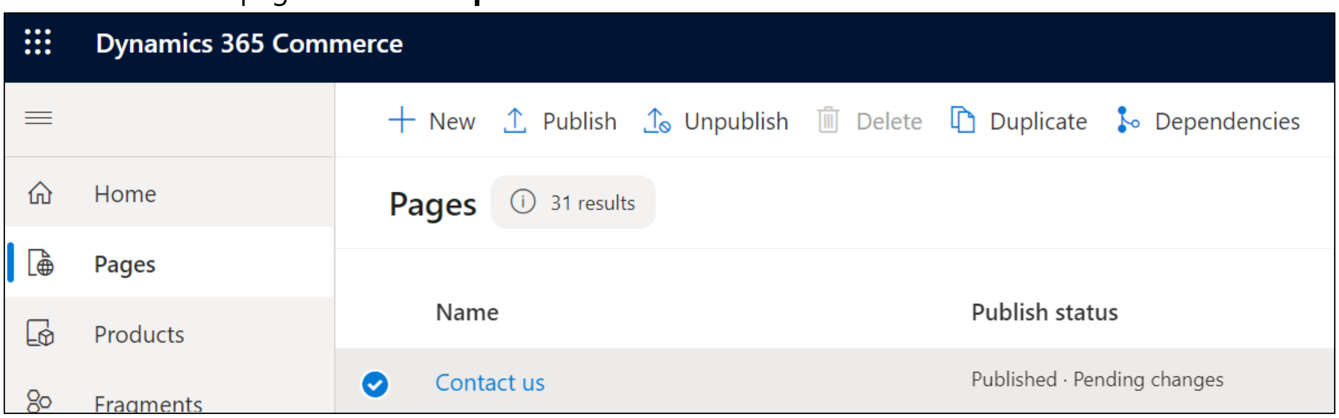
2. Click on the Site mentioned by the instructor.



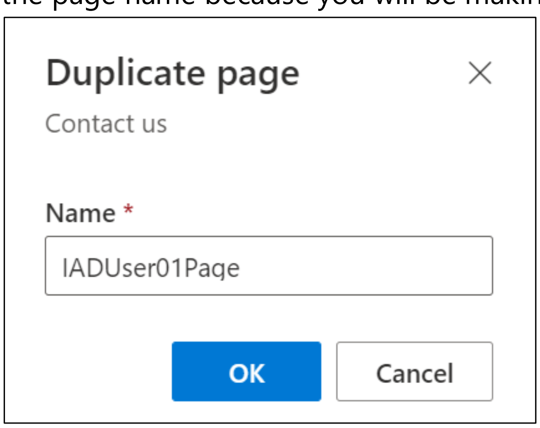
3. Select **Pages** on the left navigation bar.



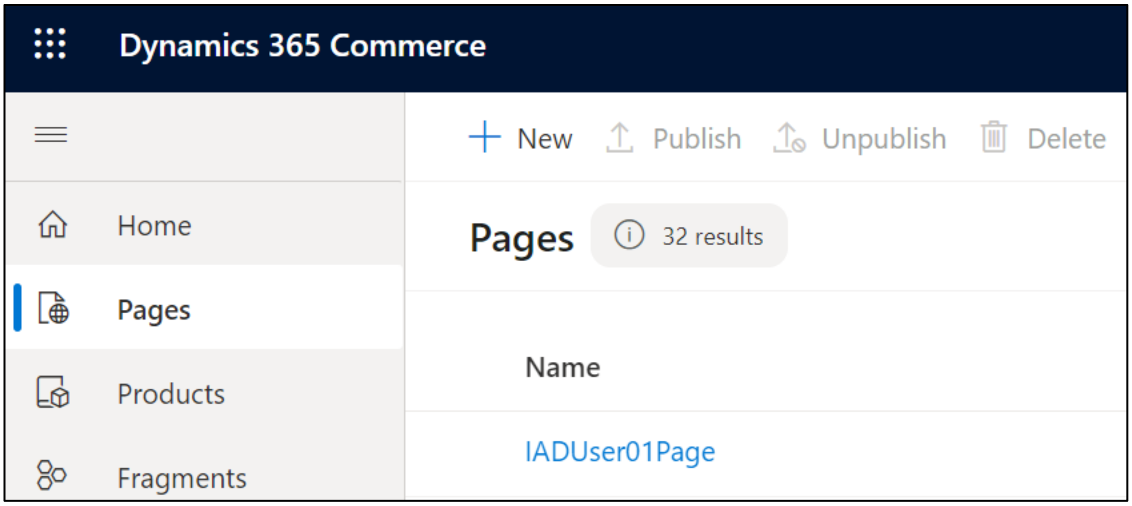
4. Select **Contact us** page and click **Duplicate.**



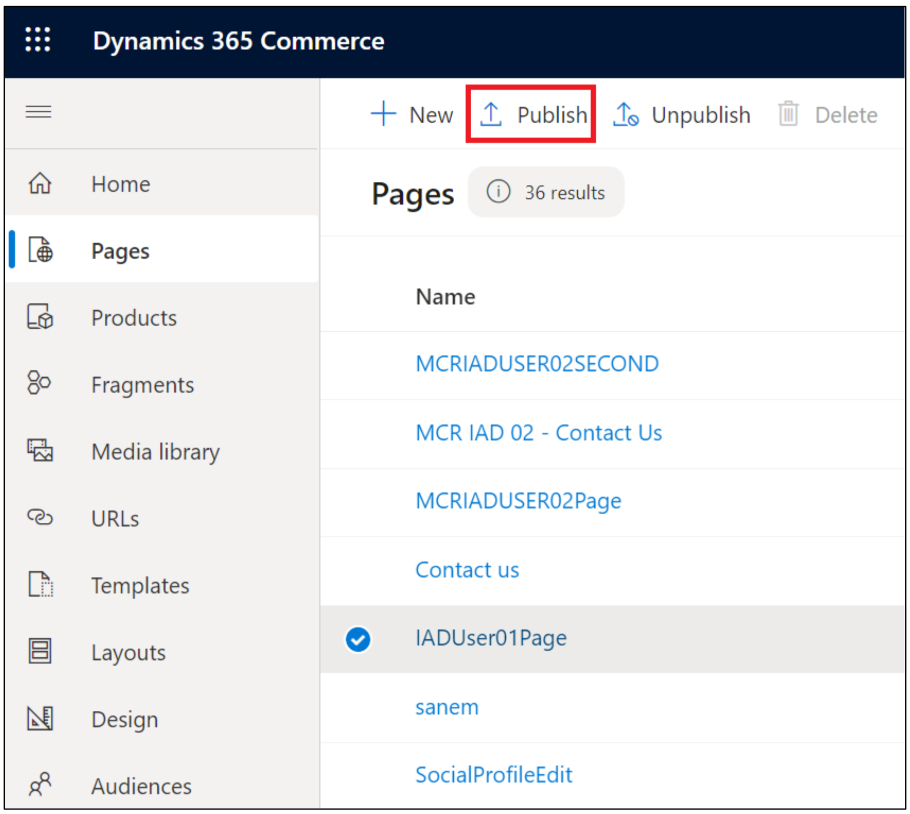
5. Provide a unique name for the page. For Ex: <<UserName>>Page and Select **OK** button. Remember the page name because you will be making changes to the same page in Lab 02 (Microsoft Clarity).



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



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

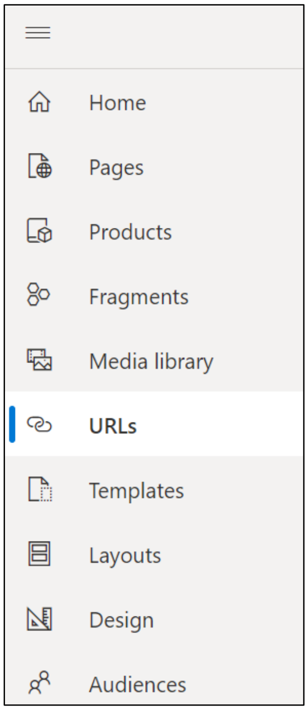


Congratulations! You have successfully created and published a new page.

Task 2: Create and Publish URL

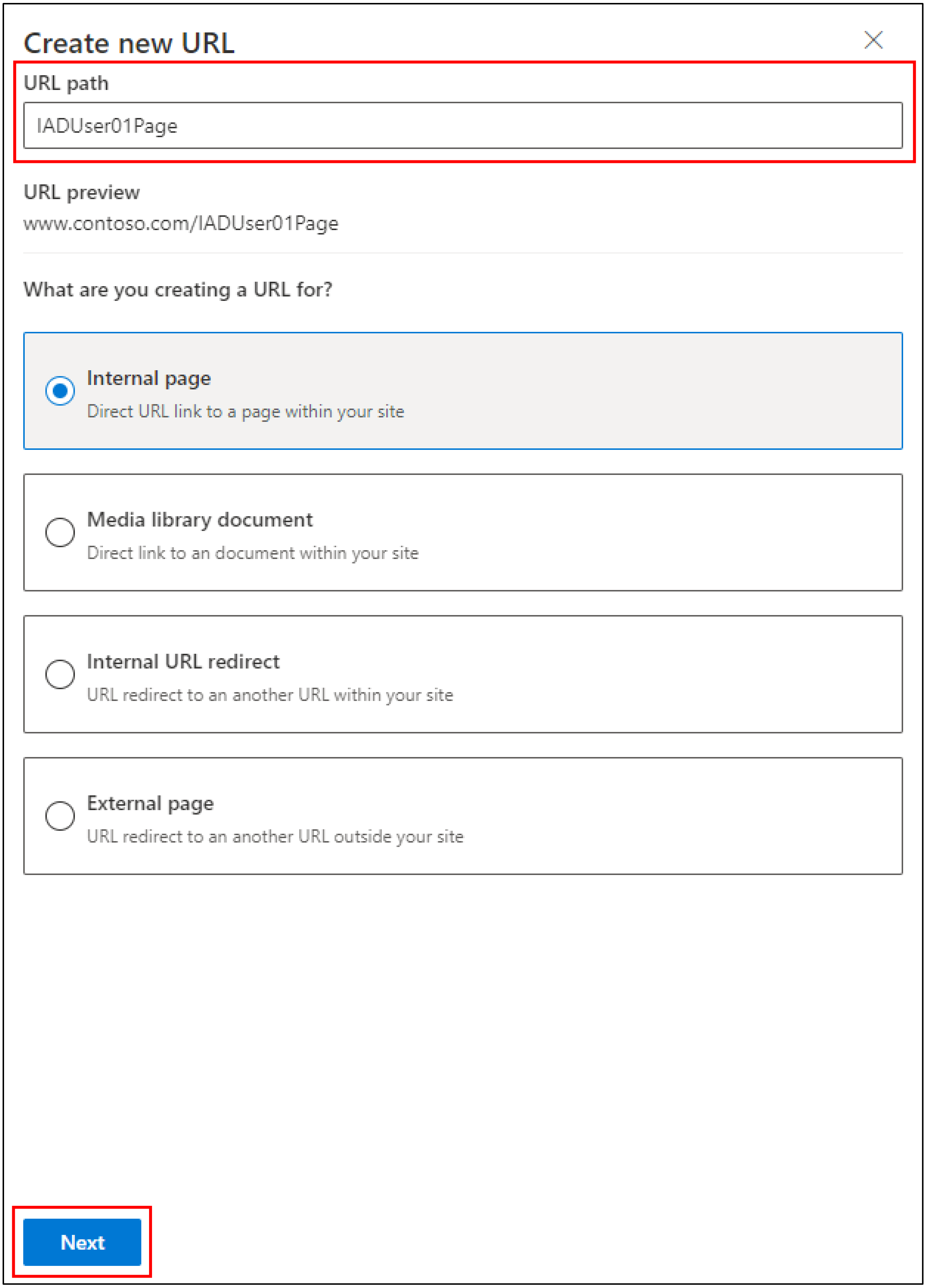
In this task, you will learn the steps to create a new URL for the page created in the earlier task.

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

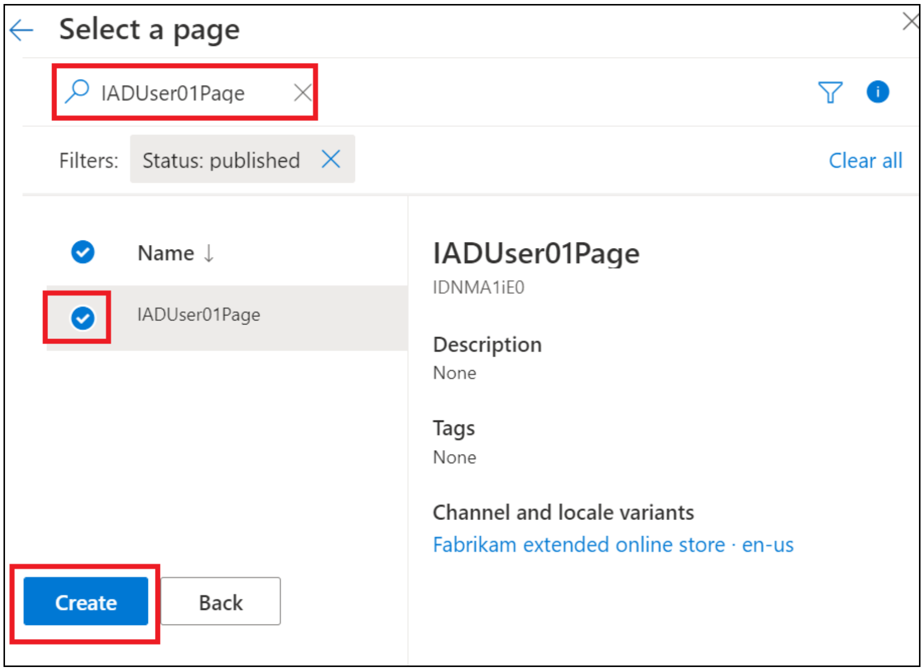


2. Select **+New** and the **New URL** in the command bar.

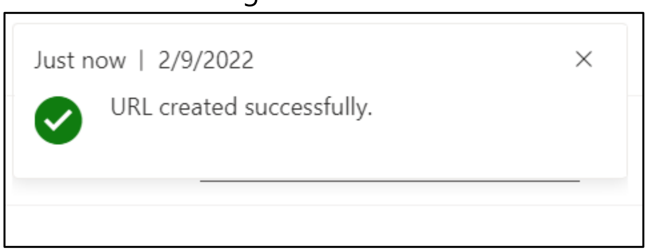
3. Provide a unique name (Eg: IADUser<<Number>>Page) in the **URL path** field and select **Internal page** and then select **Next** button.
Note: Remember the URL path name as it would be required in the later exercise to chat with PVA bot and human agent.


Create new URL
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 an document within your site
Internal URL redirect
URL redirect to an another URL within your site
External page
URL redirect to an another URL outside your site
Next

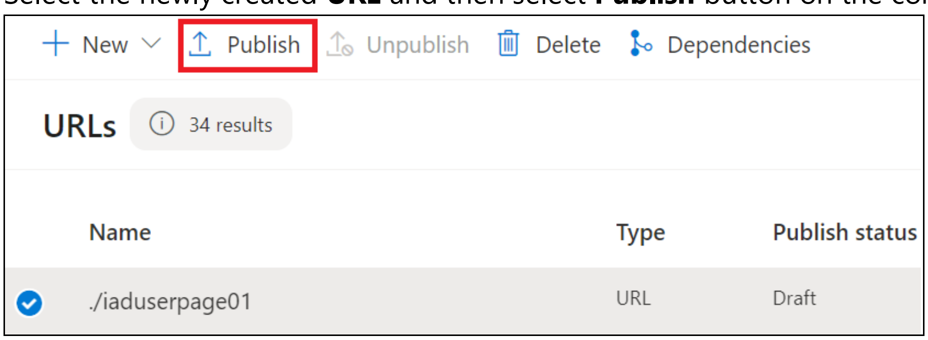
4. Search for the page created in Task 1(For Ex: IADUser01Page) and select your page then select **Create** button.



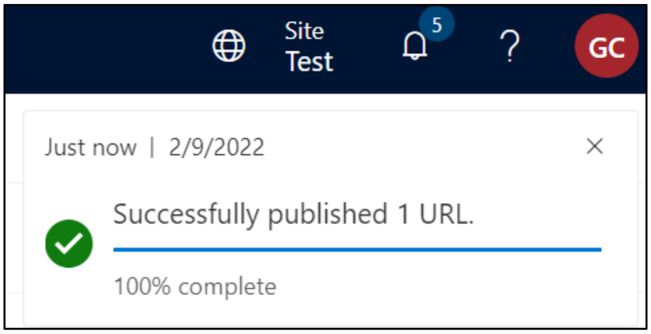
5. If the URL is successfully generated, you will see a notification on the top right edge of the browser with a successful message.



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.

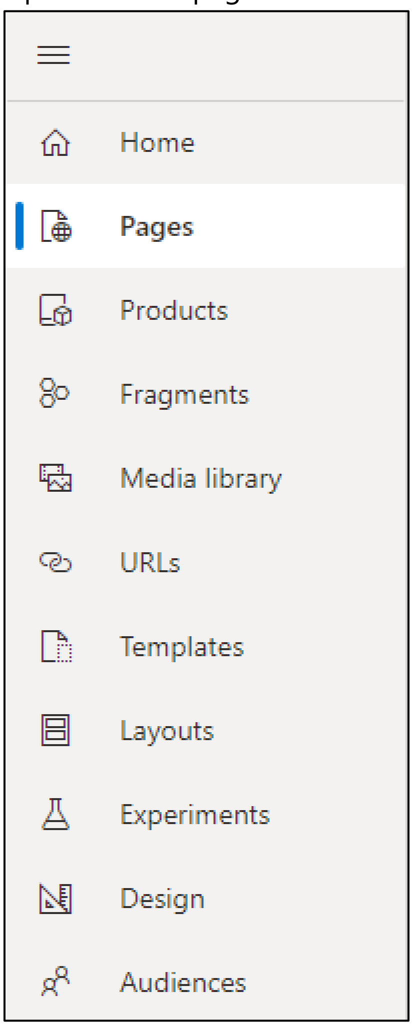


Congratulations! You have successfully created a URL and published it.

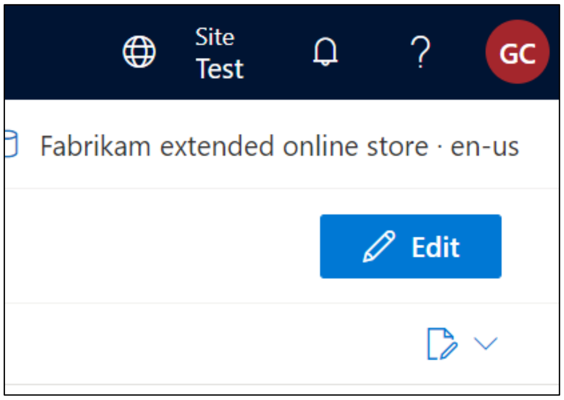
Task 3: Embed a Chat Widget into an e-Commerce Site Page

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

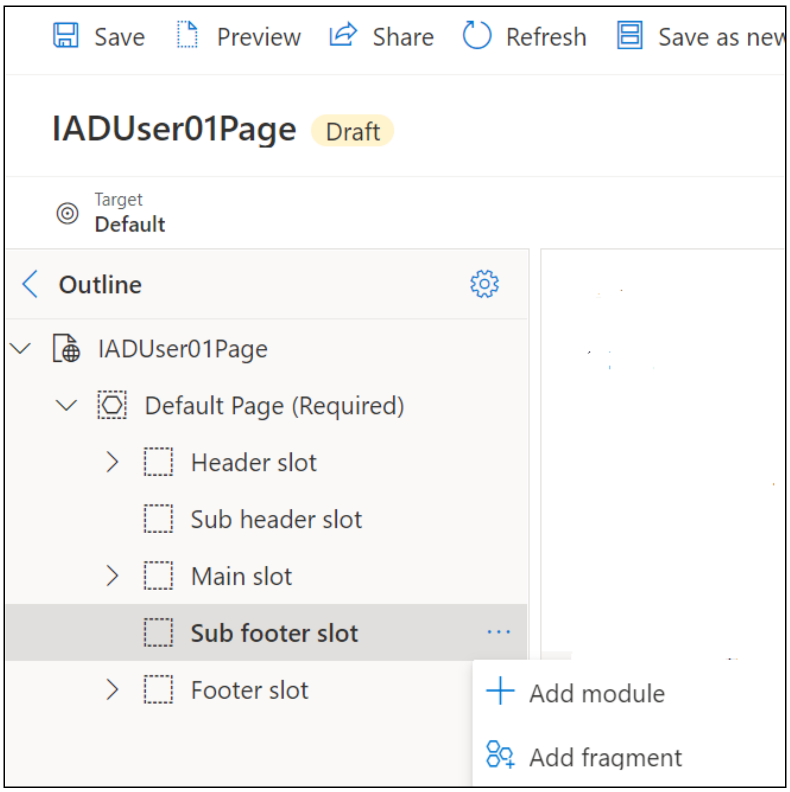
1. Open the new page created in Task 1. Click on Pages in Left Navigation Bar



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

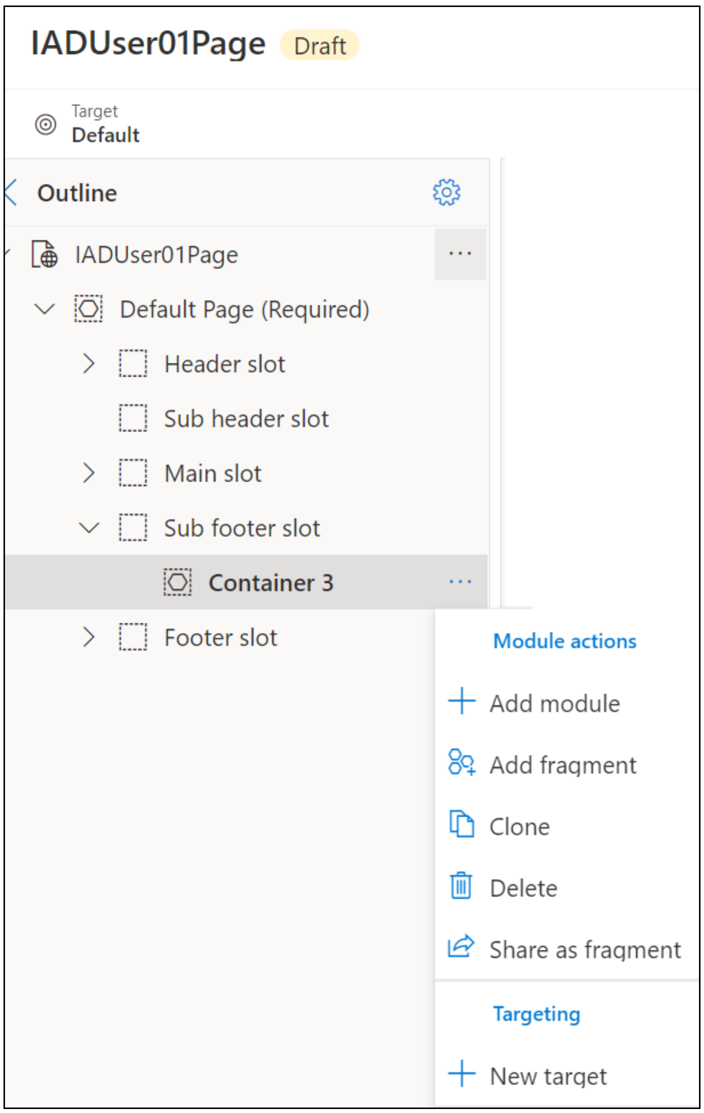


4. Select **Sub footer slot** and then select + **Add module.**

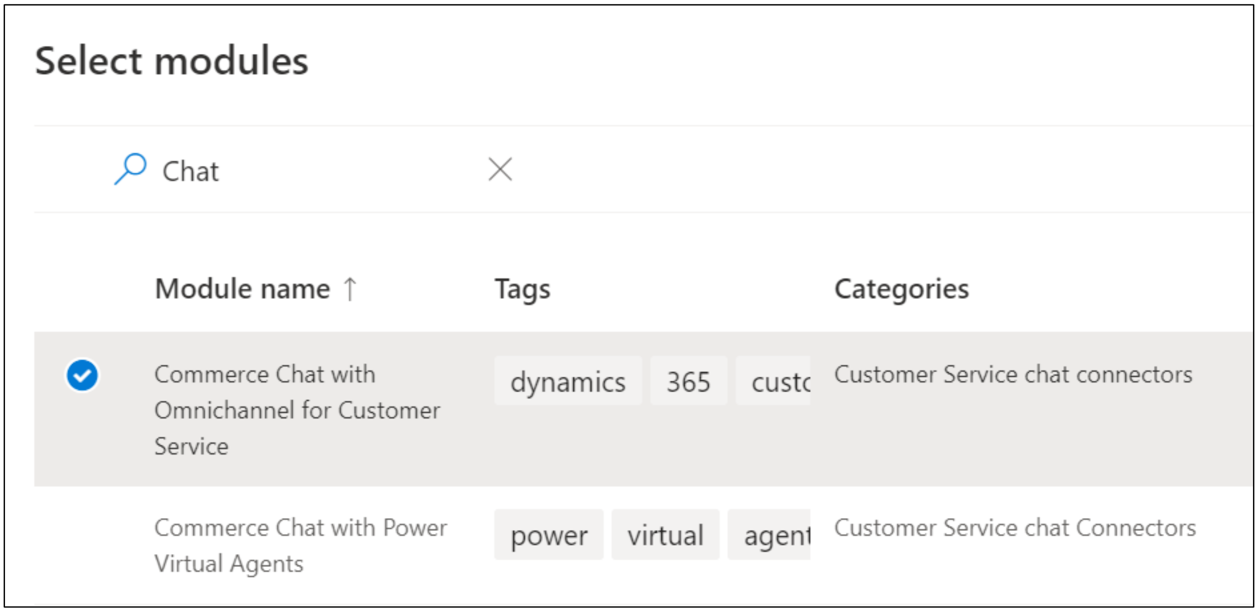


5. Select **Container** module and then click on **OK**.

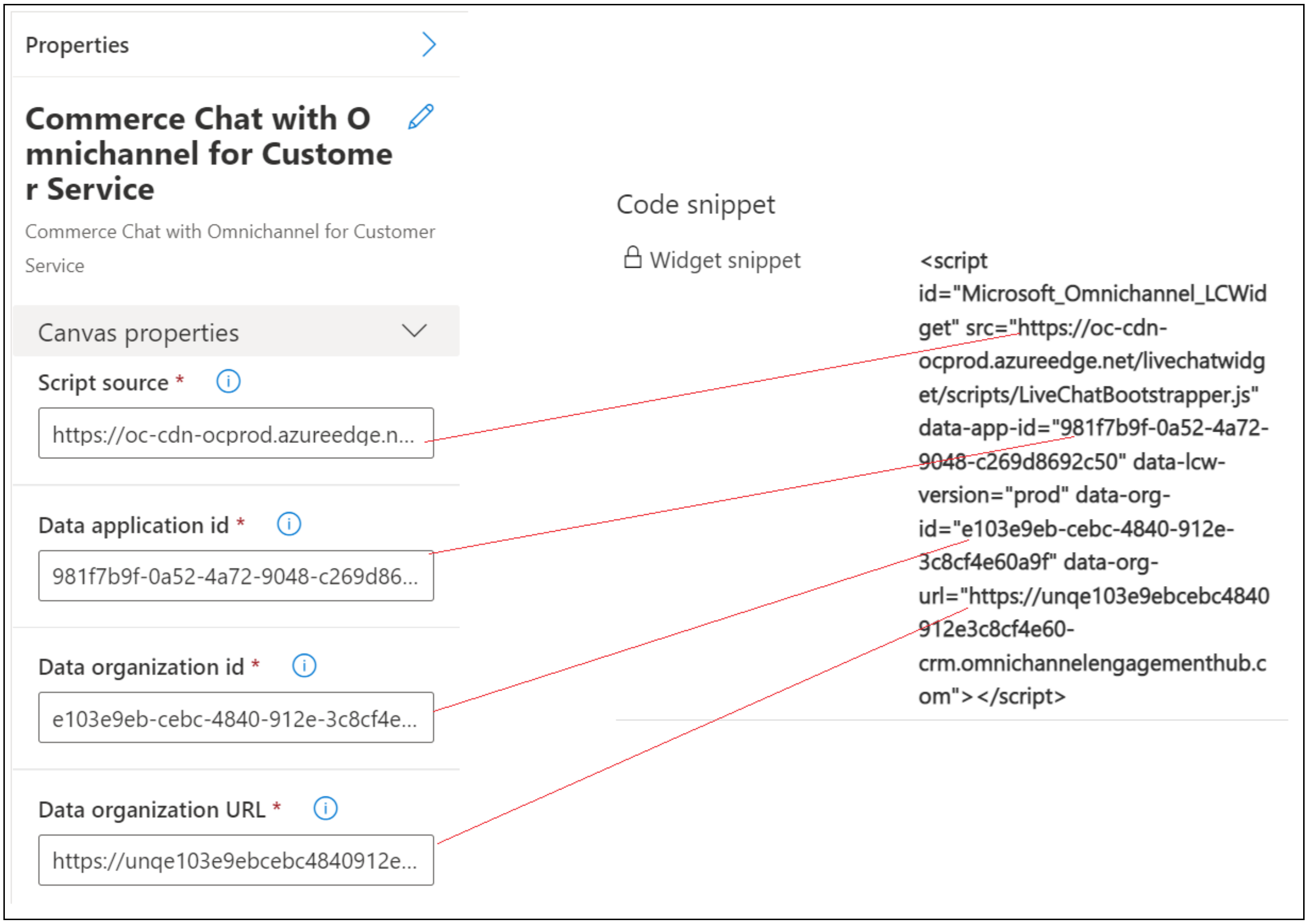
6. Select the newly added container (**Container 3)** and then select + **Add module.**

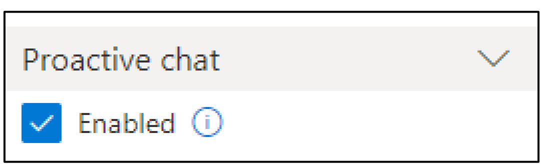


7. Search for **chat** and select the module **Commerce Chat with Omnichannel for Customer Service** and then select **OK**.

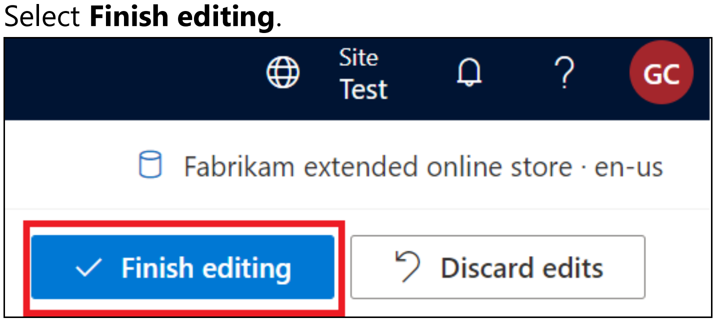


8. Update the listed properties for the Commerce Chat module from the Widget Code Snippet copied in the last step of the earlier exercise [Exercise 2>Task 3>Step 9]. Please follow the steps based on the Properties illustration below
    a. **Script source** : Copy the value in the tag src
    b. **Data 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

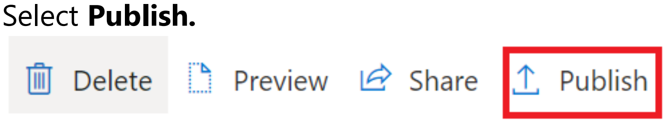




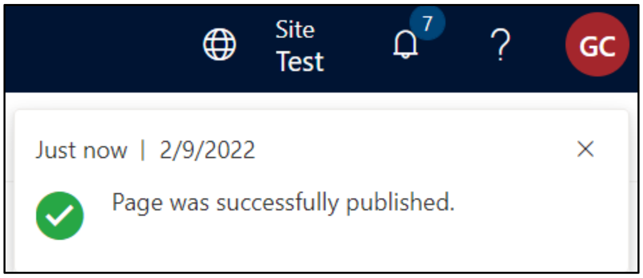
9. Select **Finish editing**.



10. Select **Publish.**

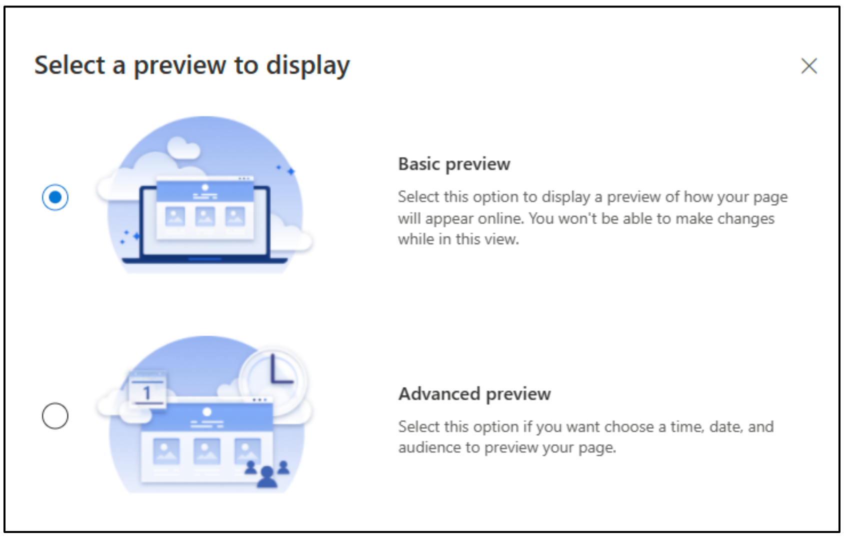


11. If the page has been successfully published, you will see a notification on the top right edge of the browser with a successful message.

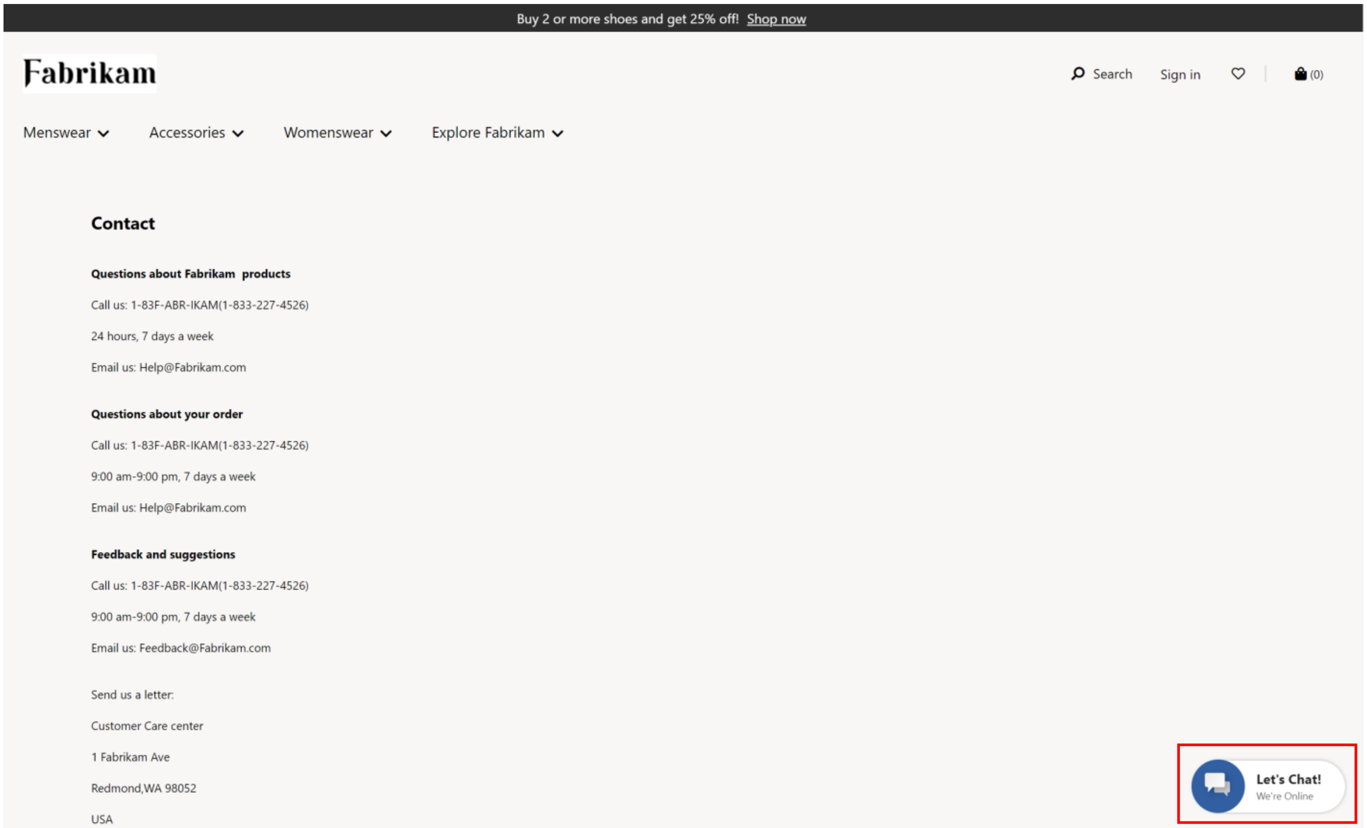


12. Select **Preview.**

13. Click on Basic Preview.



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

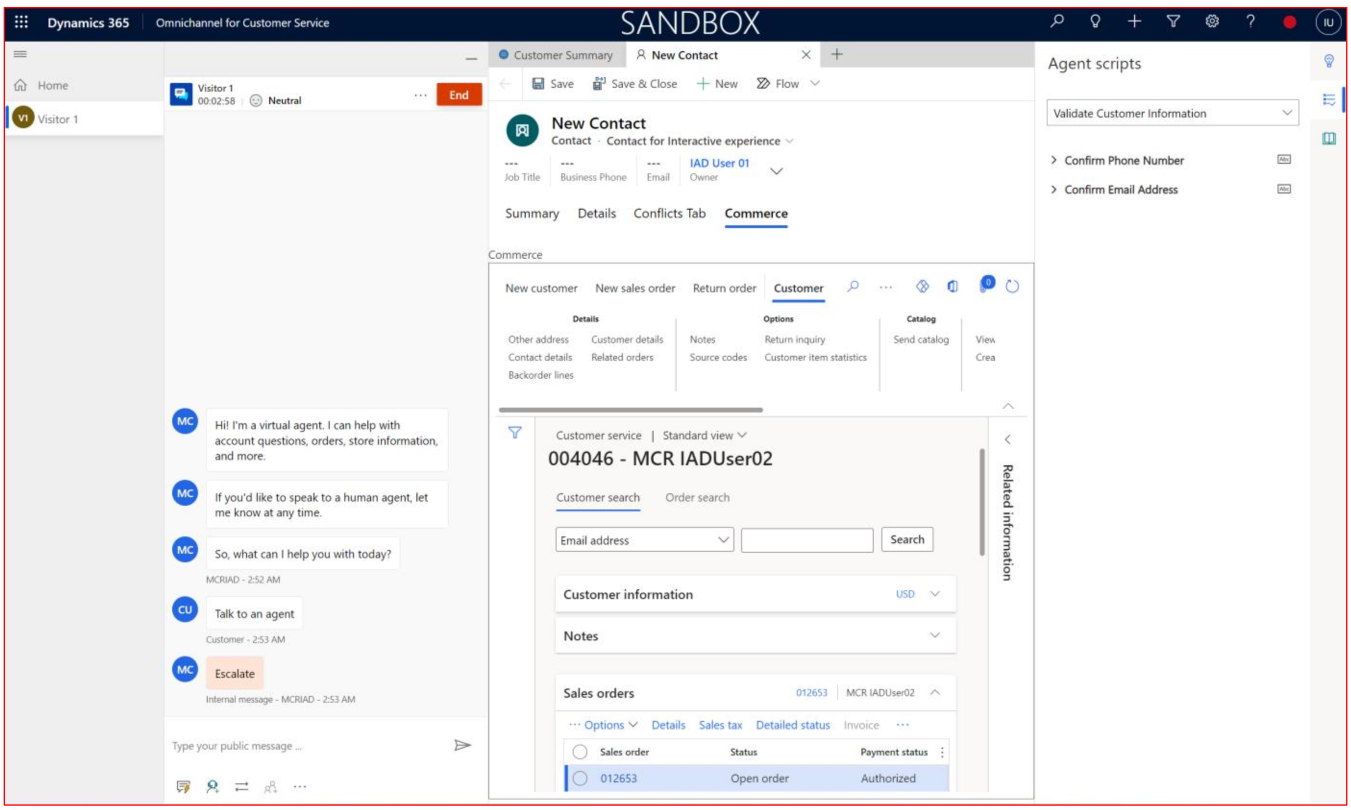


Congratulations! In this exercise, you have successfully created & published an e-commerce page, its url and then embedded the chat widget into an e-commerce page.

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.

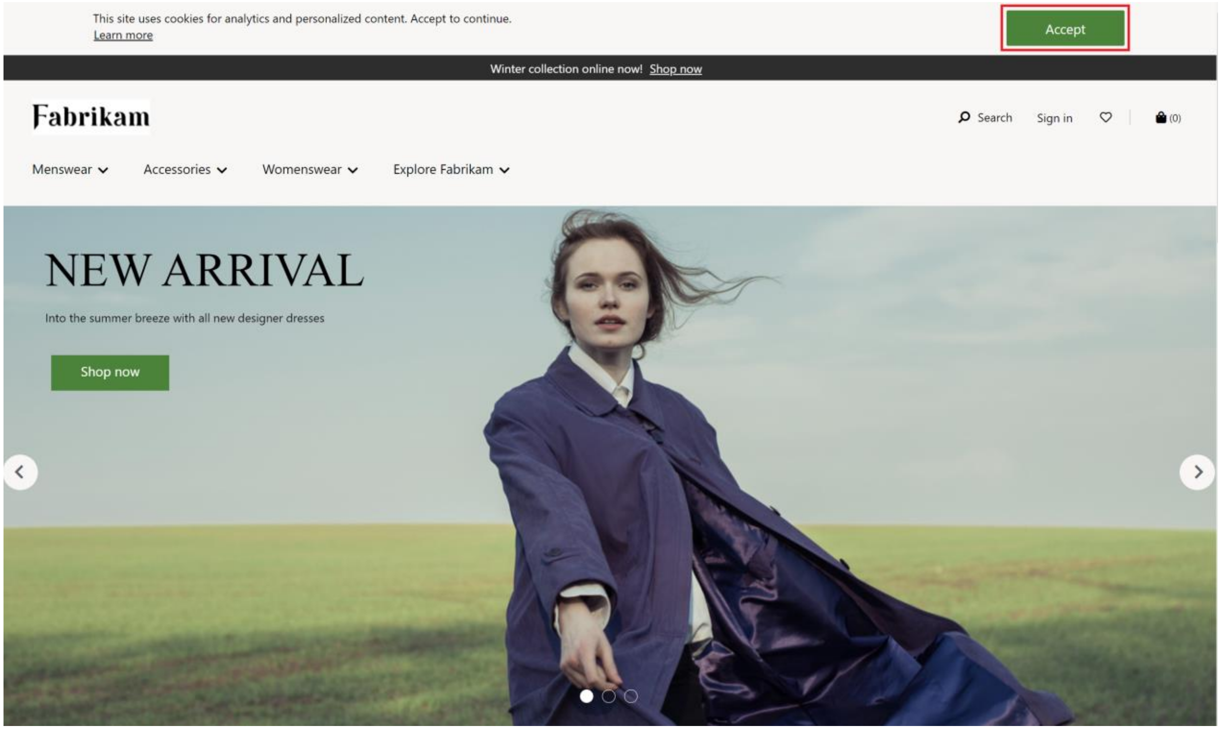
The following screen shows Omnichannel Customer Service after a customer has been escalated to a live agent. This lab will conclude by bringing together all the components we’ve set up in previous exercises and show how the call agent can give personalized experiences with proposed insights directly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



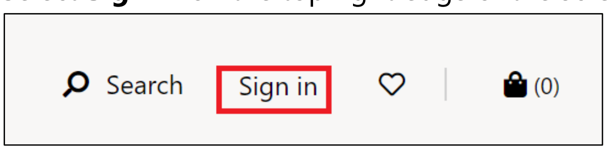
Task 1: Customer creates an account, logs into e-Commerce Site and places an order

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

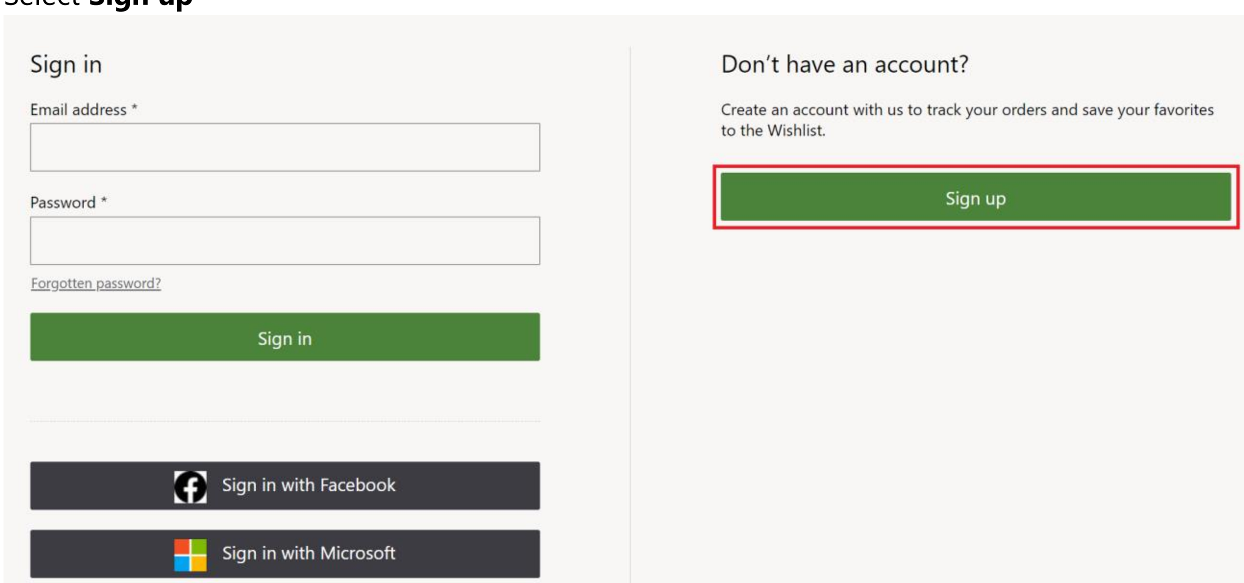
1. Open the e-Commerce Site provided by your instructor and select **Accept** button on the top right edge of the site to accept the cookies. If you don’t accept the cookies, then you might encounter an error in the checkout page.
   *Note: If you are in instructor led training. Use the E-commerce site provided by your instructor in the training information document (under the Environment name of **E-commerce Site URL**.)*



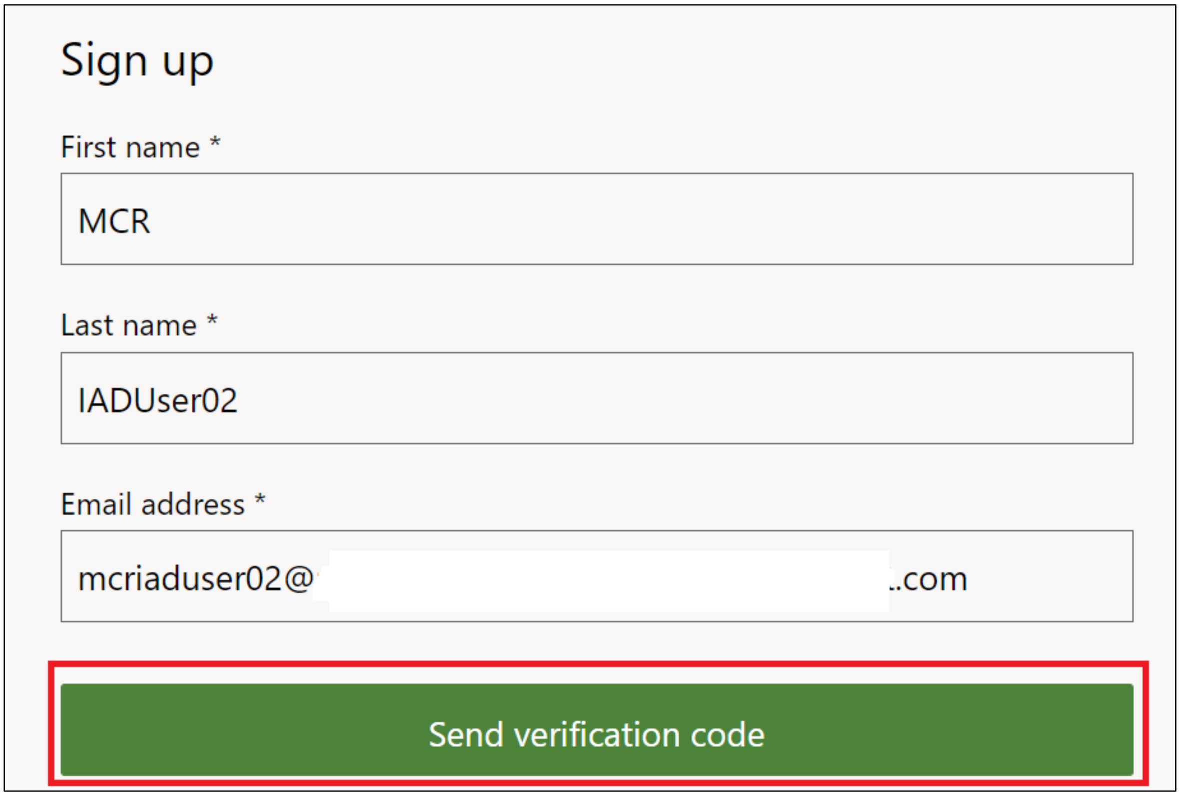
2. Select **Sign in** on the top right edge of the screen.



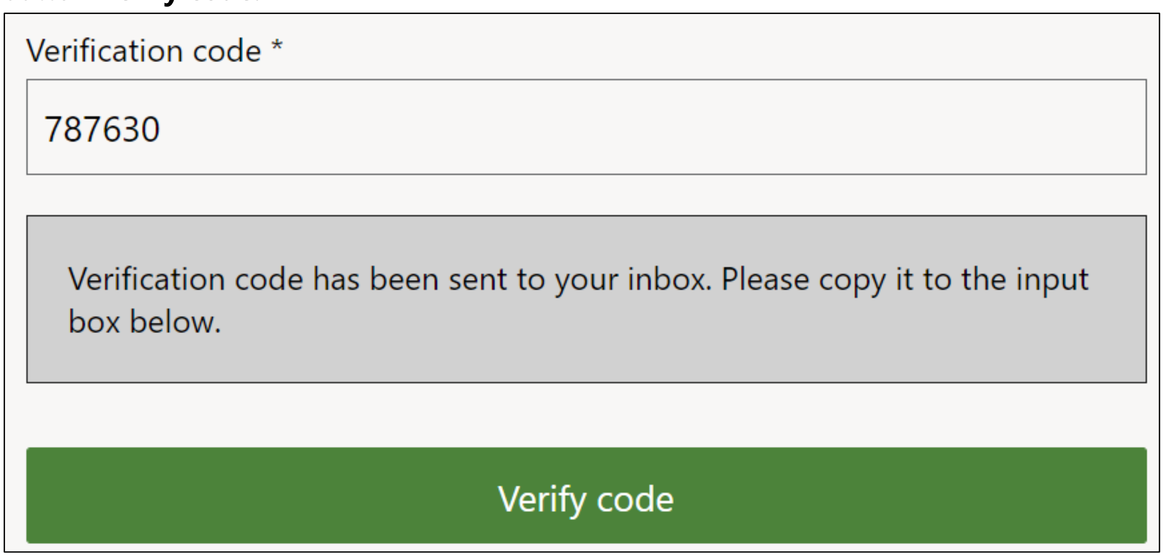
3. Select **Sign up**



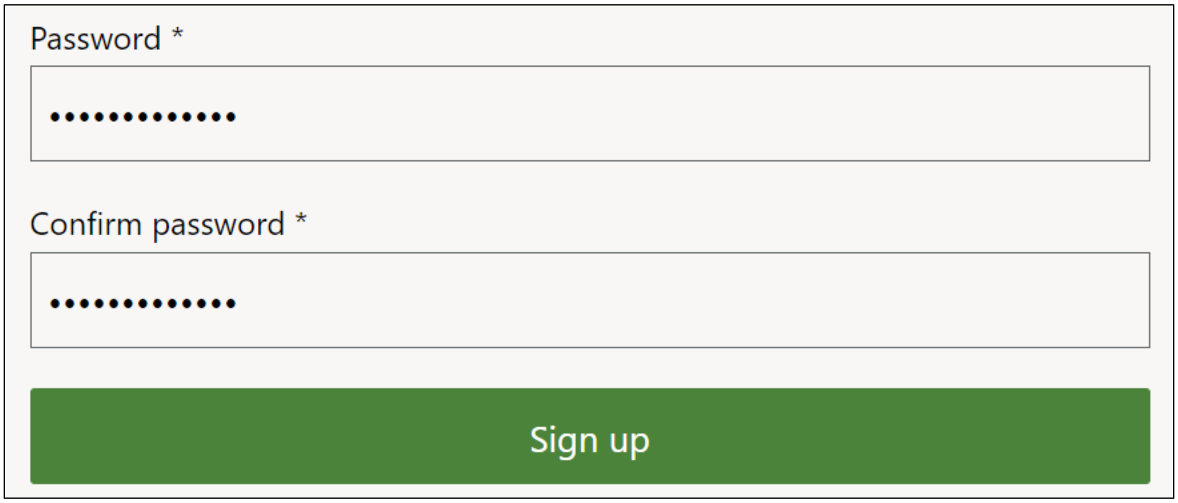
4. Provide a **First name, Last name** and a valid email on the field **Email address** and then select **Send verification code** button.



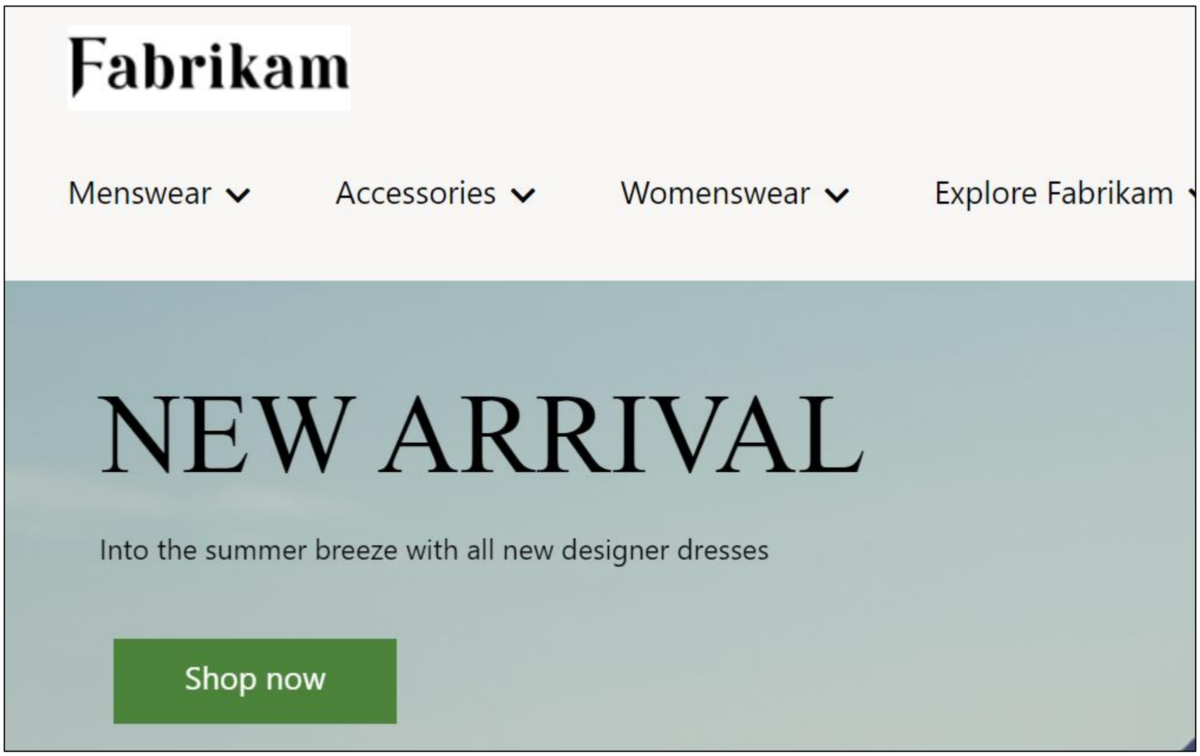
5. A verification code would have been sent to the provided email. Check your email using https://outlook.office.com and signing in using the provided user.
6. Copy the email address from the email and paste it on the field **Verification code** and select the button **Verify code.**



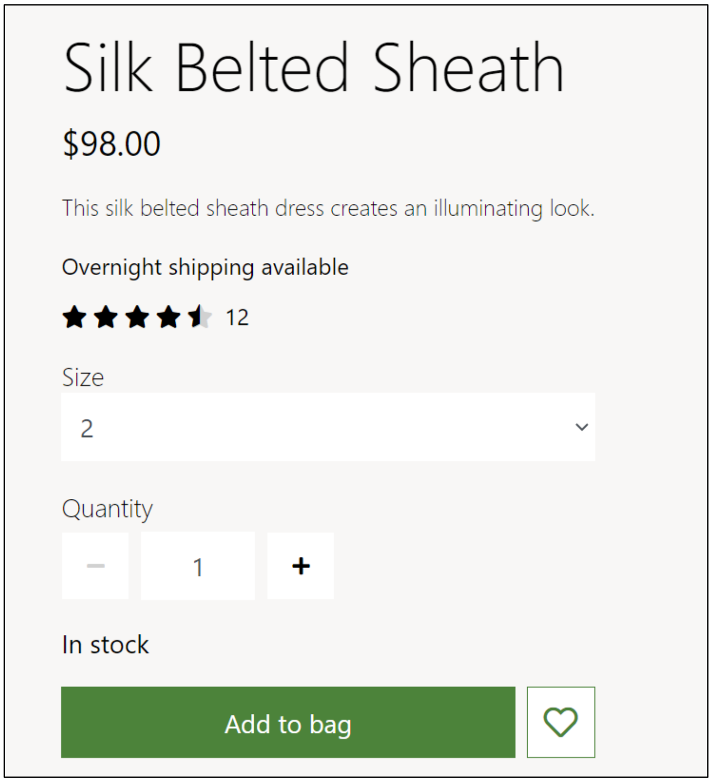
7. Enter a password, confirm the password and select **Sign up**.



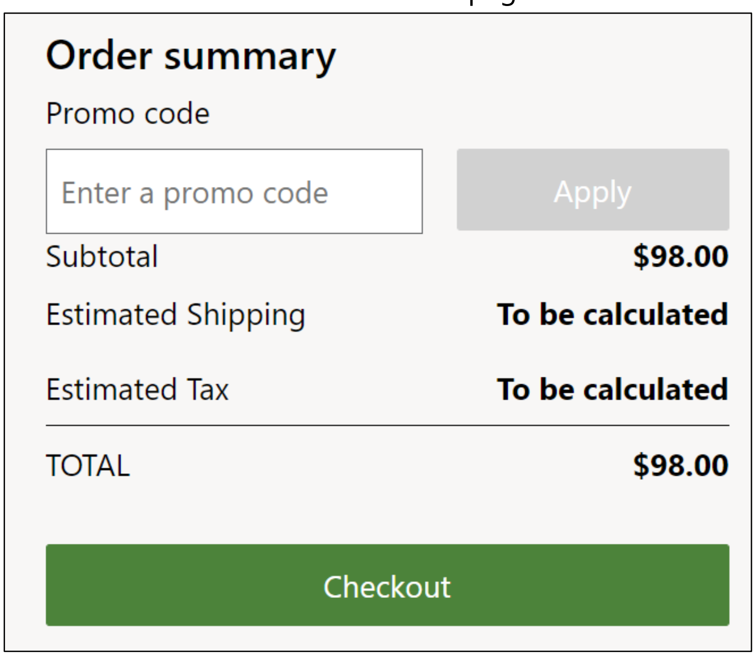
8. The system will automatically navigate back to the homepage. Select **Shop now** button on the homepage.



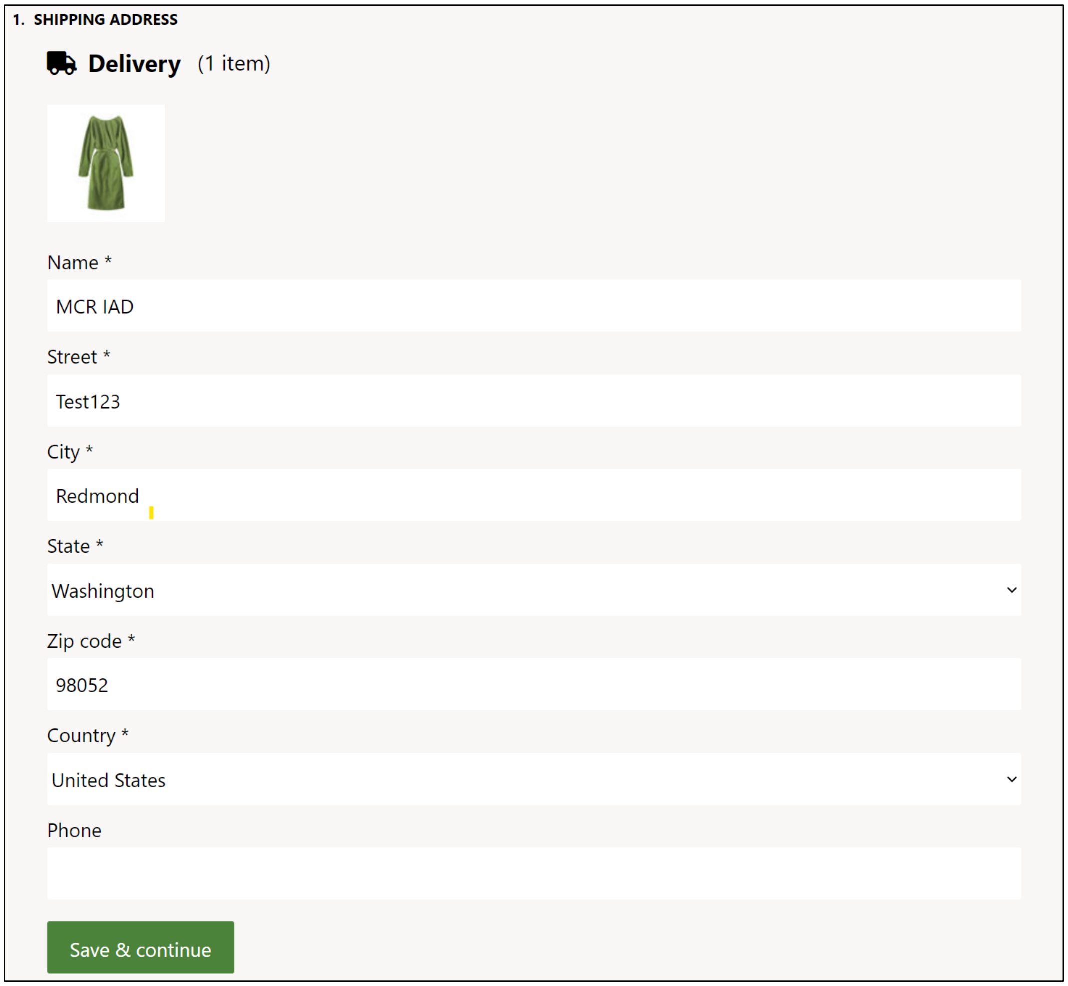
9. Select an item, size and select **Add to Bag** button and then **View Bag and checkout** button.



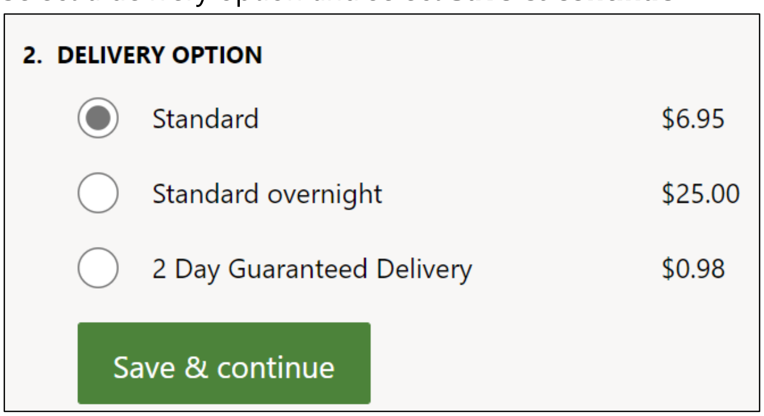
10. Select **Checkout** button on the cart page.



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

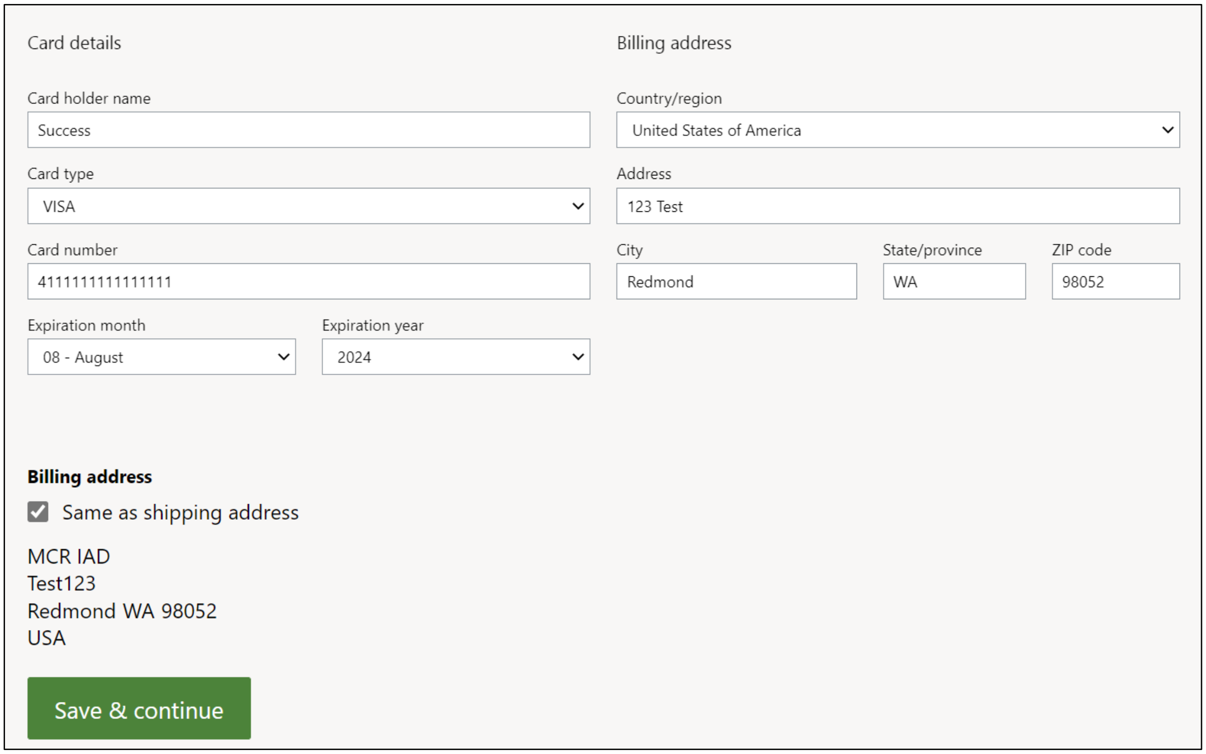


12. Select a delivery option and select **Save & continue**

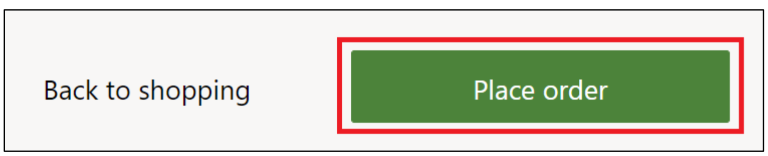


13. Provide the dummy test payment details below and select **Save & continue**
    a. **Card holder name** : Success
    b. **Card type** : VISA
    c. **Card number** : 4111111111111111
    d. **Expiration month** : 08-August
    e. **Expiration year** : 2024
    f. **Country/region** : United States of America
    g. **Address** : 123 Test
    h. **City** : Redmond

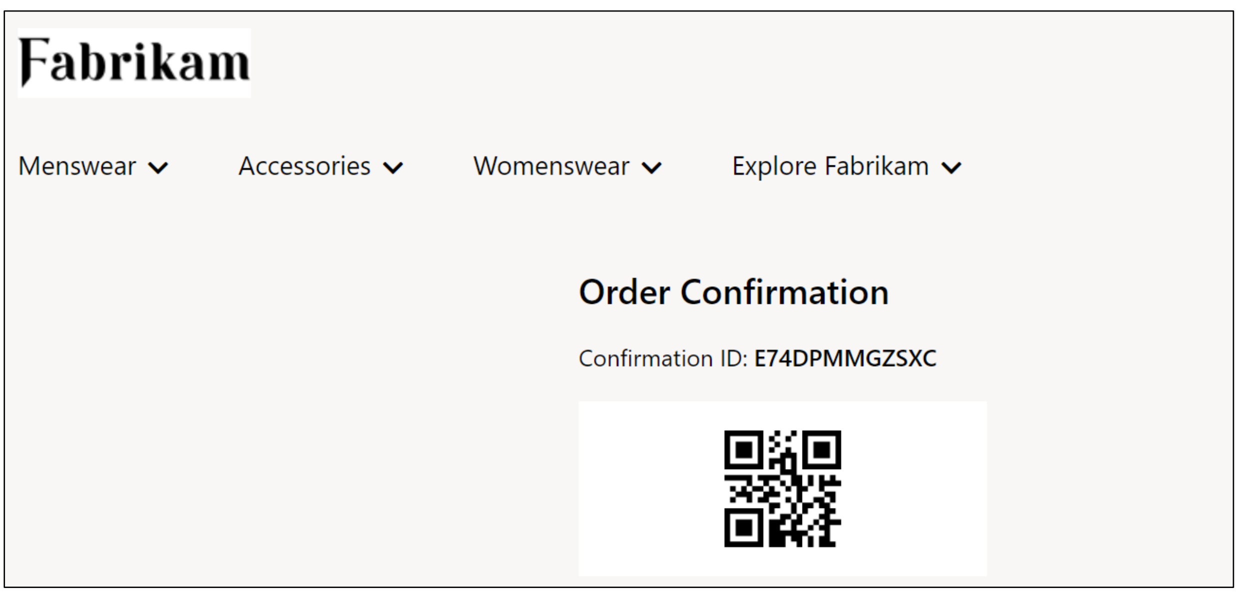
i. **State/province** : WA
j. **ZIP code** : 98052
k. **Same as shipping address** : Set the checkbox to Yes.



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

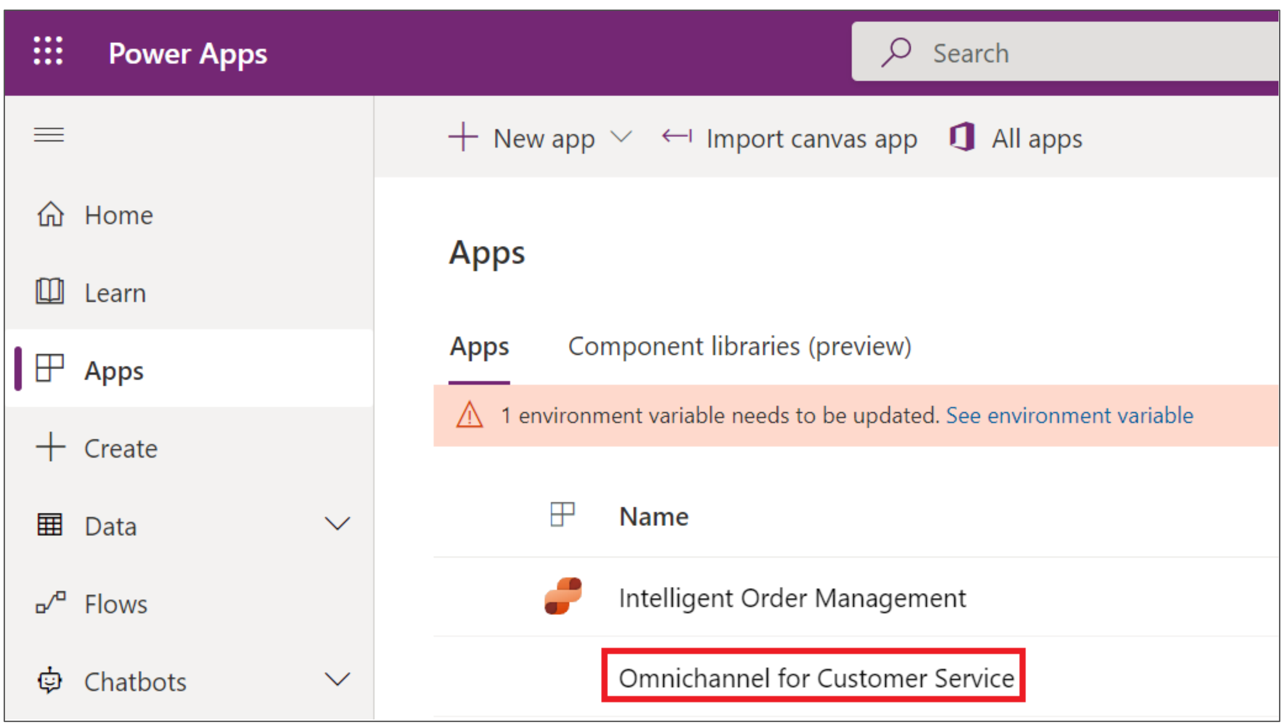
In this task, you will login into Omnichannel for Customer Service as a Customer agent.

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.

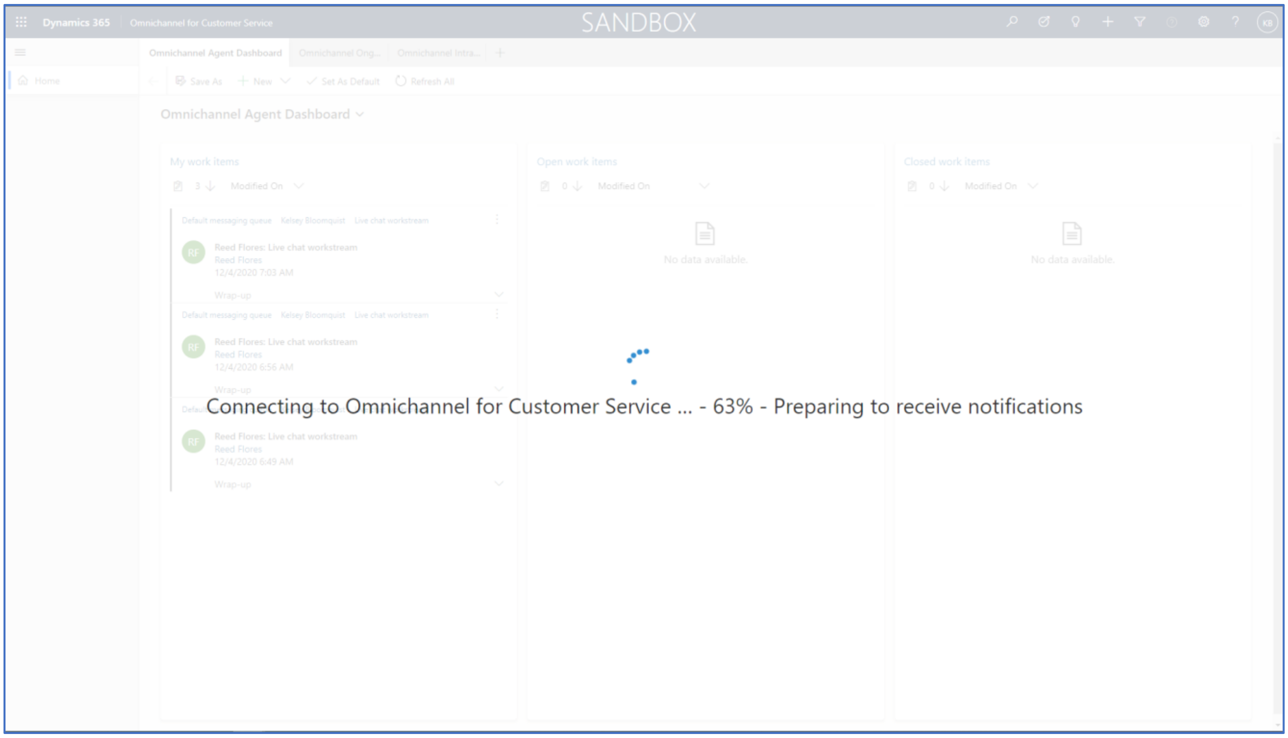
   *Note: If you are in instructor led training. Use the D365 F&O URL provided by your instructor in the training information document. Use the URL provided under the Environment Name of "**D365 F&O Environment:**"*

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.

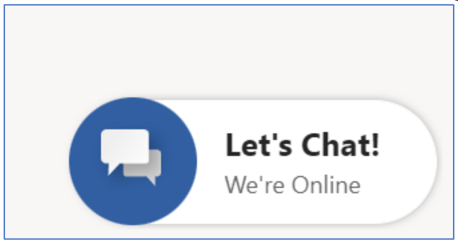
4. Once your presence indicator is green on top right edge of the site, you are ready to accept customer escalations.

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

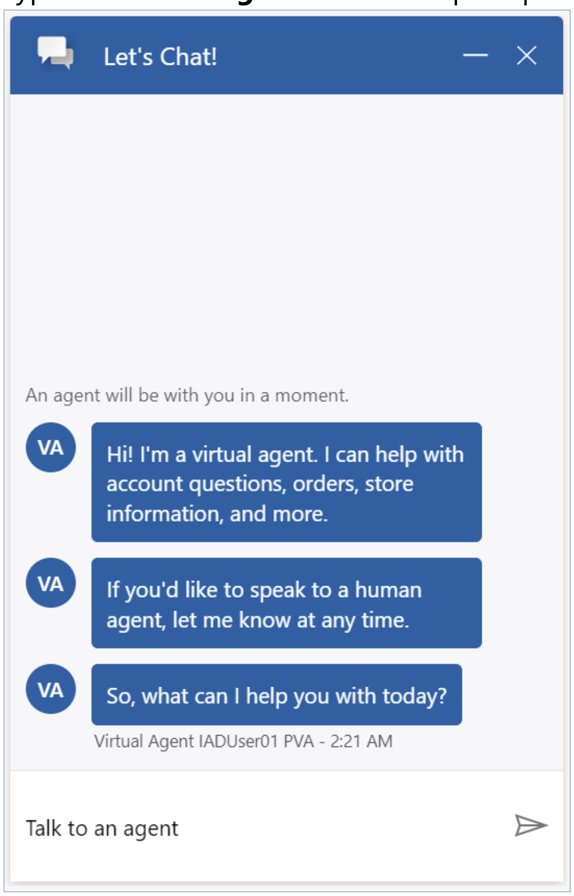
Task 3: Customer Escalates through PVA Bot

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

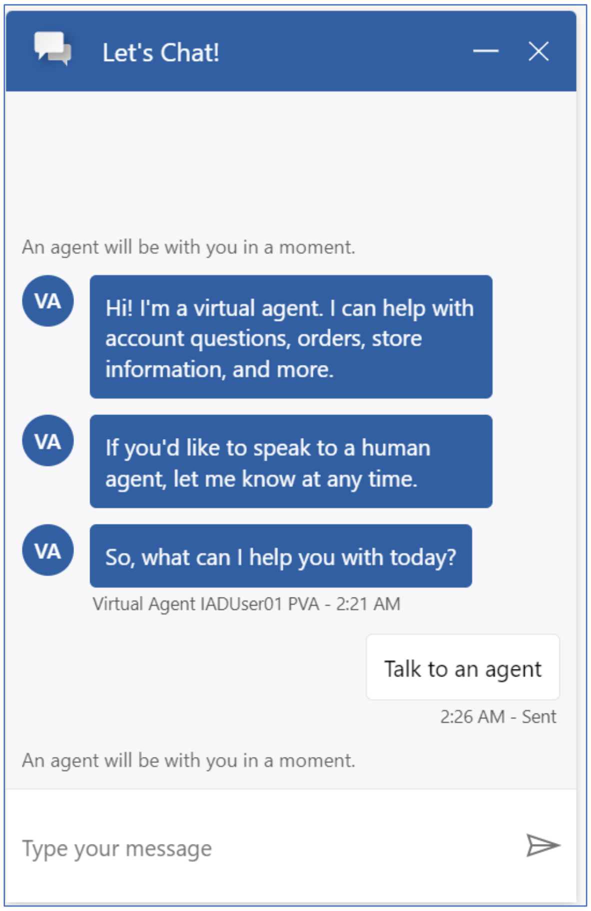
1. Open a new tab page in your browser and append the e-Commerce Portal's url at the end with the url name created in Exercise 5- Task 2. For Ex: https://mcriad.commerce.dynamics.com/iaduser01page
2. Select **Let's Chat** PVA Bot chat widget in the bottom right corner of the site.



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.**



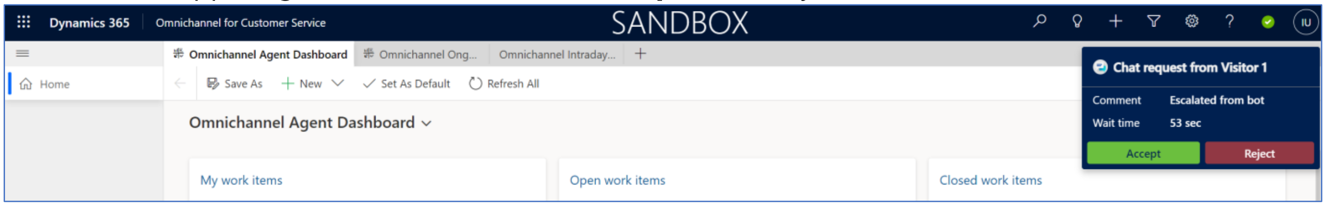
6. Now let's switch over to the Omnichannel for Customer Service app so you can accept the escalation as an agent.

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.

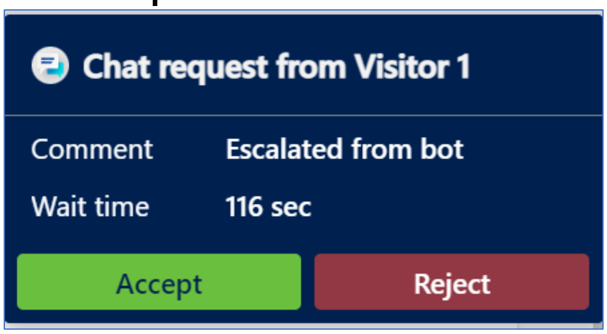
Task 4: Agent Provides Personalized Service in Omnichannel for Customer Service with the Productivity Pane

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.

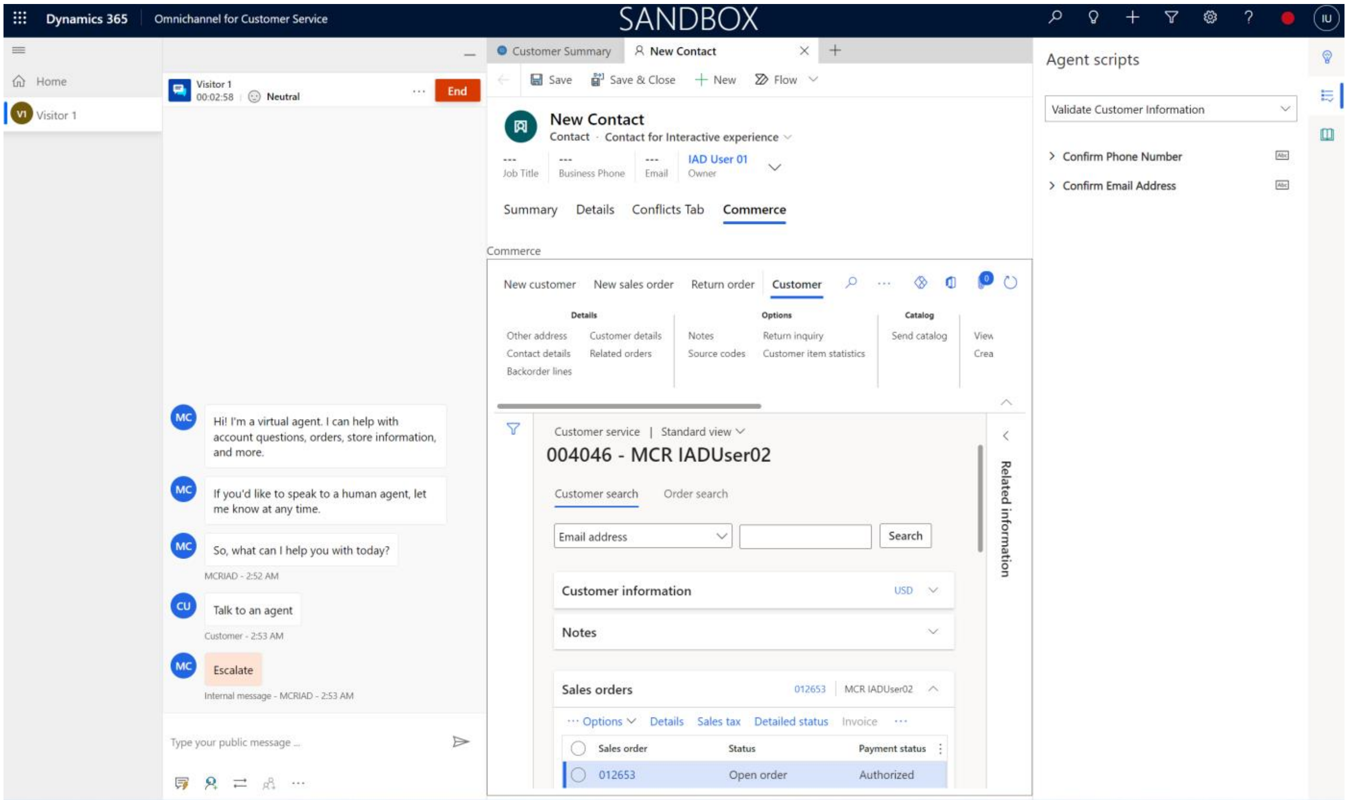
1. Navigate back to the **Omnichannel for Customer Service** app. You should be signed in as your IAD User.
2. Notice in the upper right corner there is a **Chat request** from your user.



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

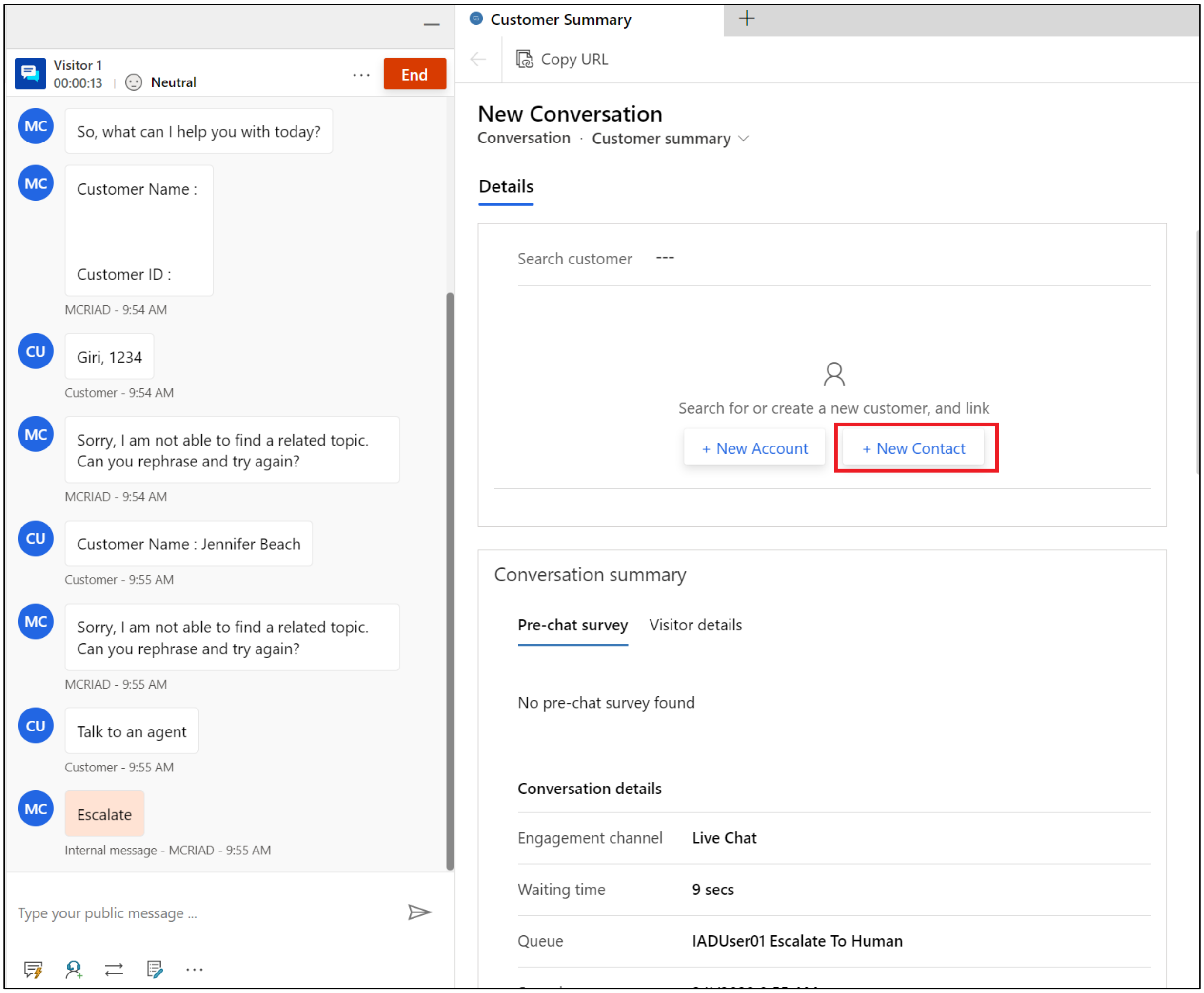


4. The page should reload, automatically identify the Customer although the data isn't present in Dataverse and show the customer record along with Sales order details from D365 F&O, active chat, and productivity pane as seen below.

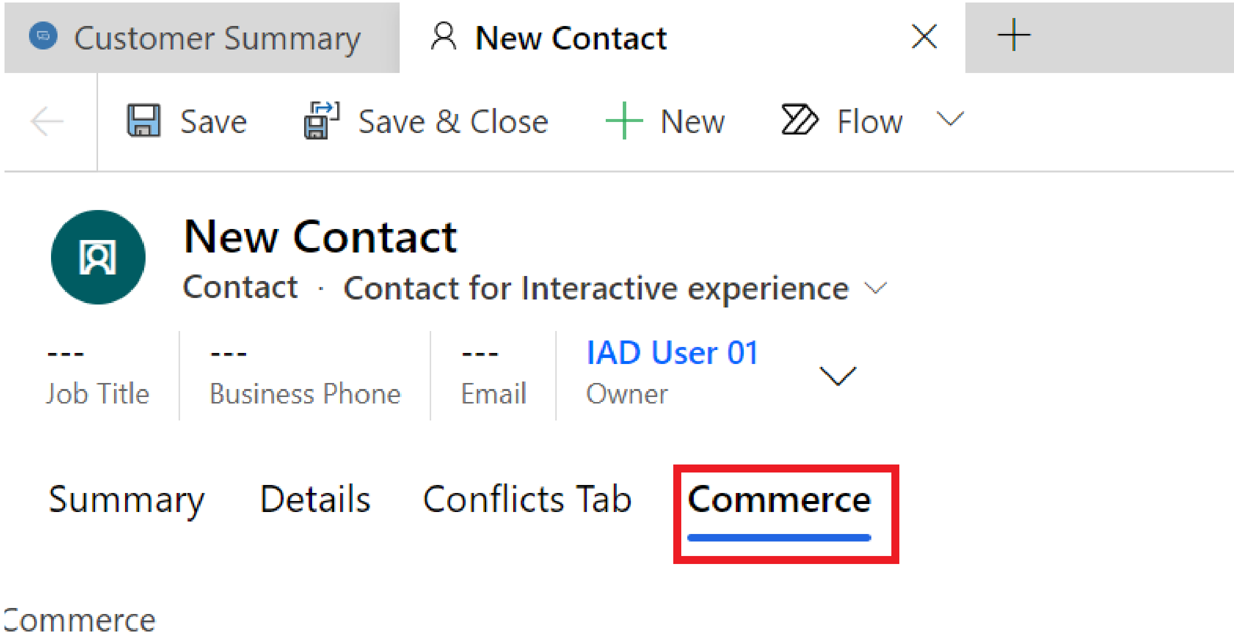


Note: Due to a known bug in the feature, if the customer isn't automatically detected and populated on the screen then follow the below steps to find the corresponding F&O customer:

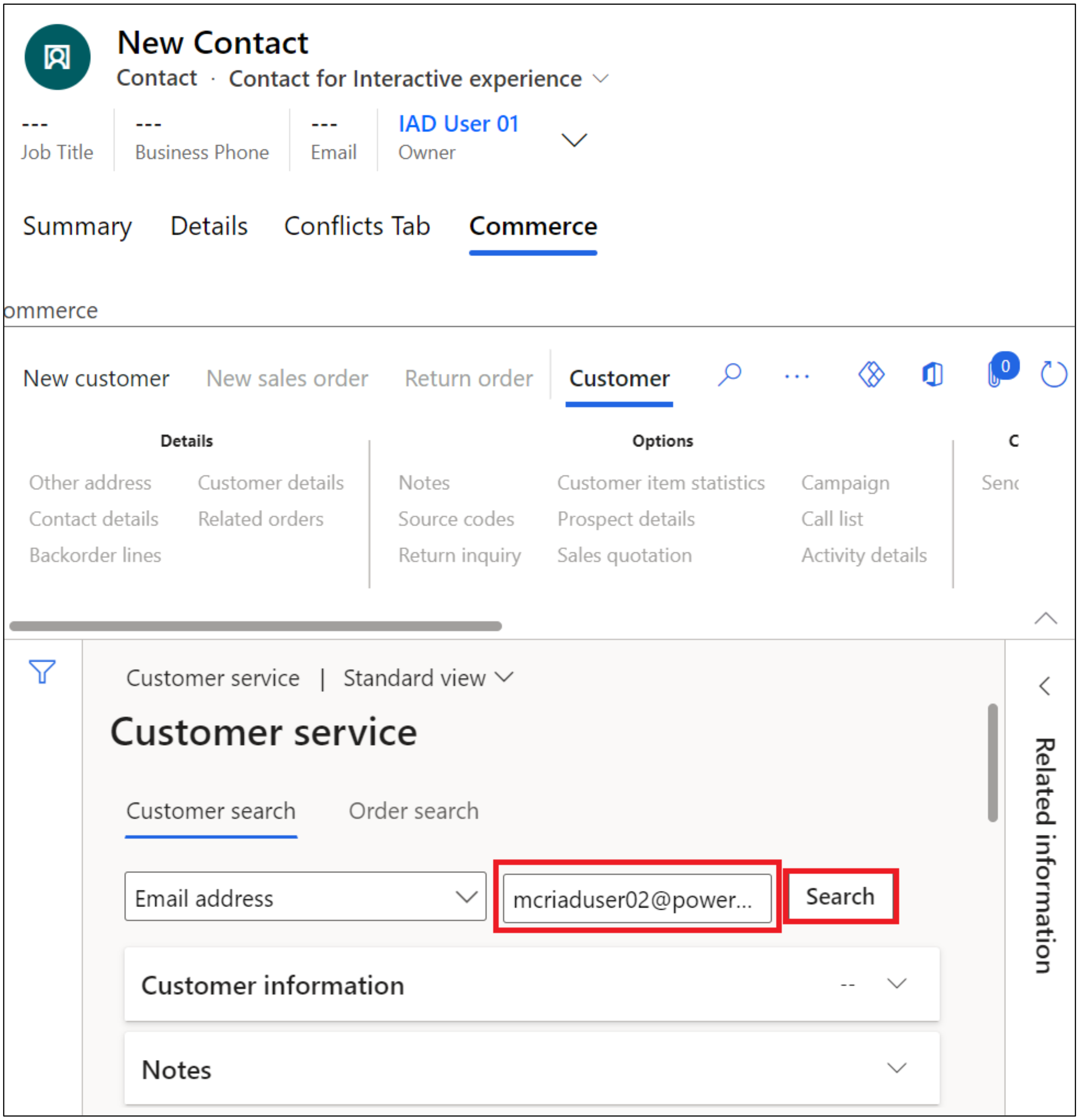
a) Select +**New contact** on the Customer Summary tab which will open a new contact tab.



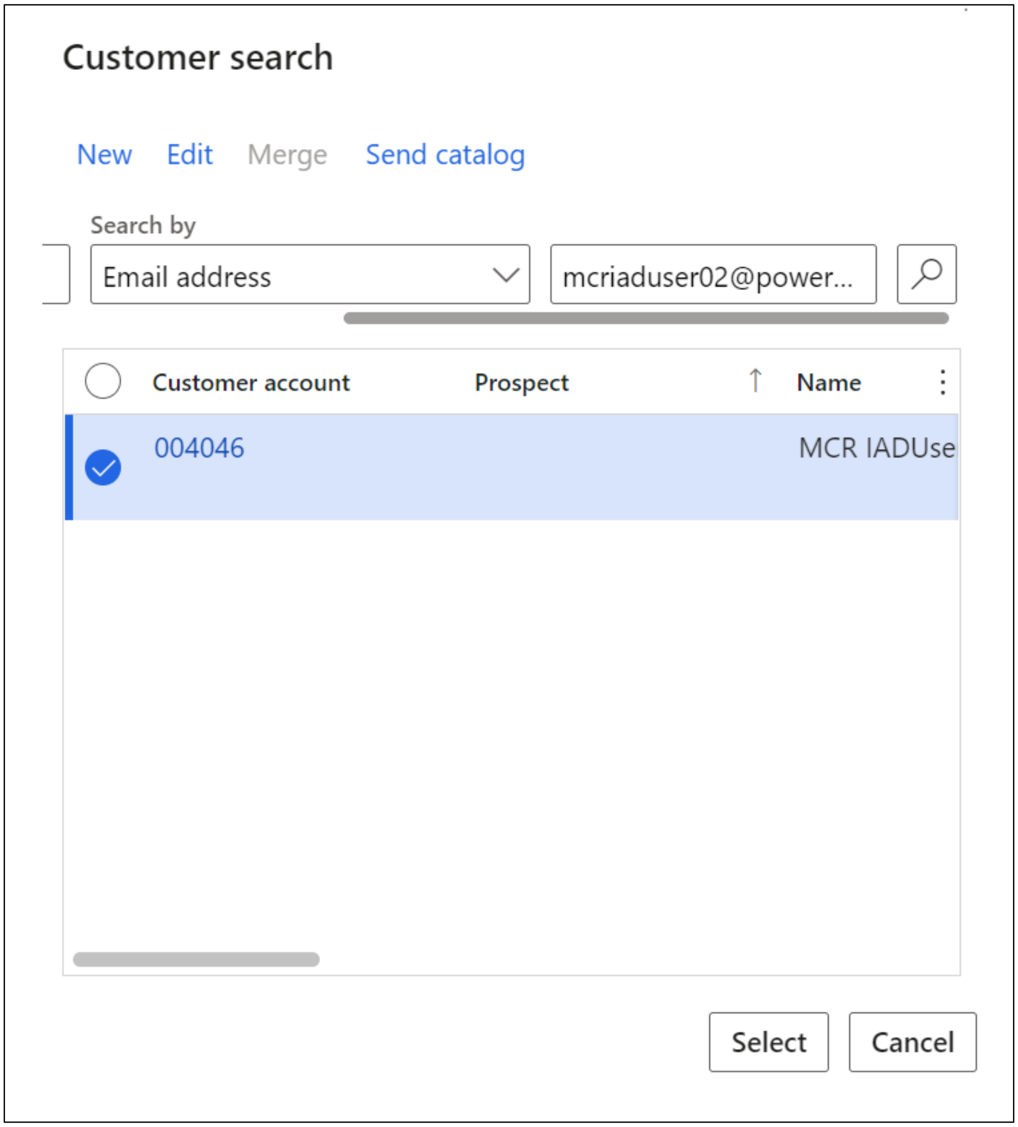
b) On the **New contact** tab, select **Commerce** and this will open the embedded F&O Customer Service screen.



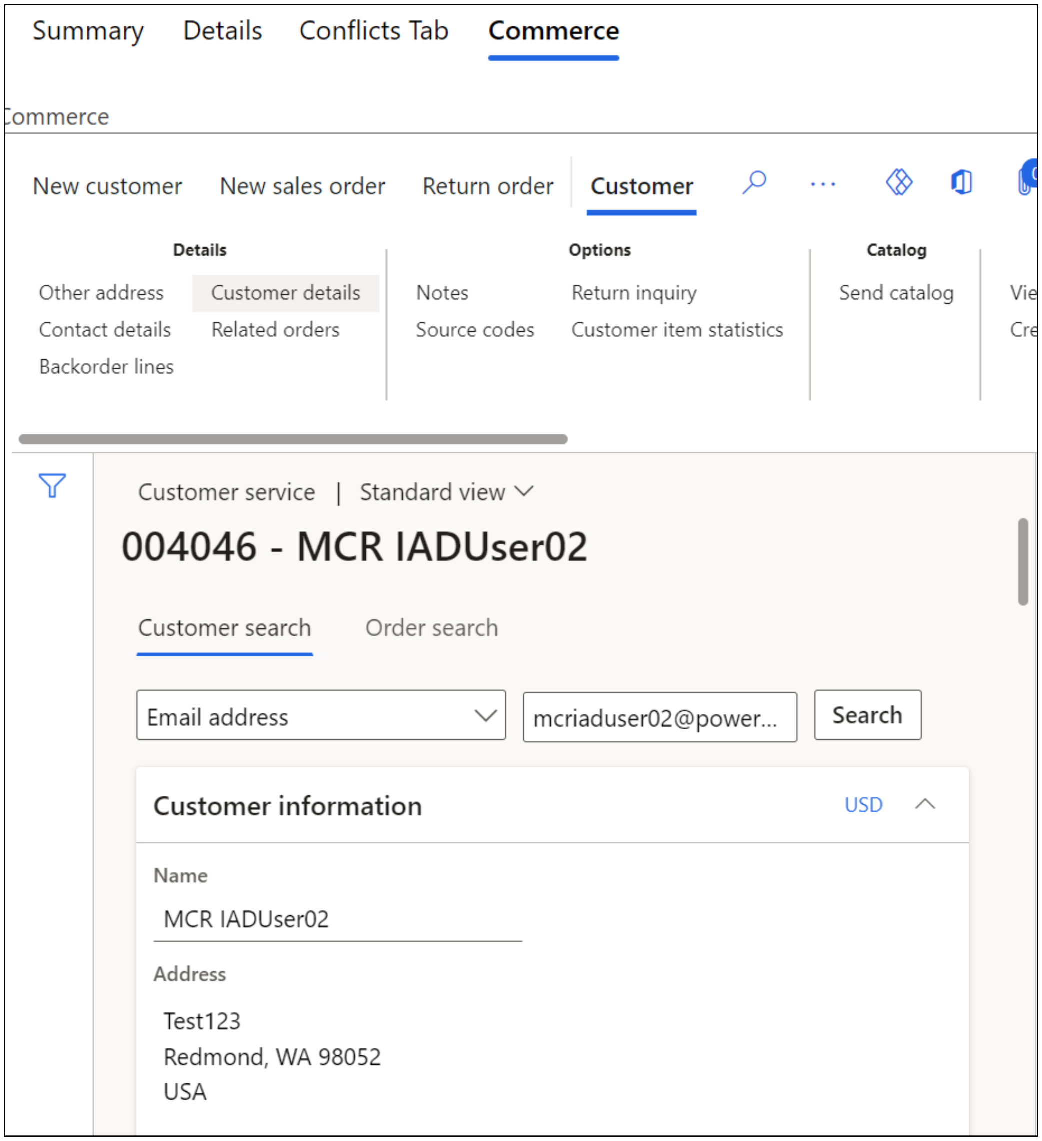
c) Search the email address used to register on the e-Commerce site and then click on **Search** button which will open a Customer Search pop-up screen to select the customer.



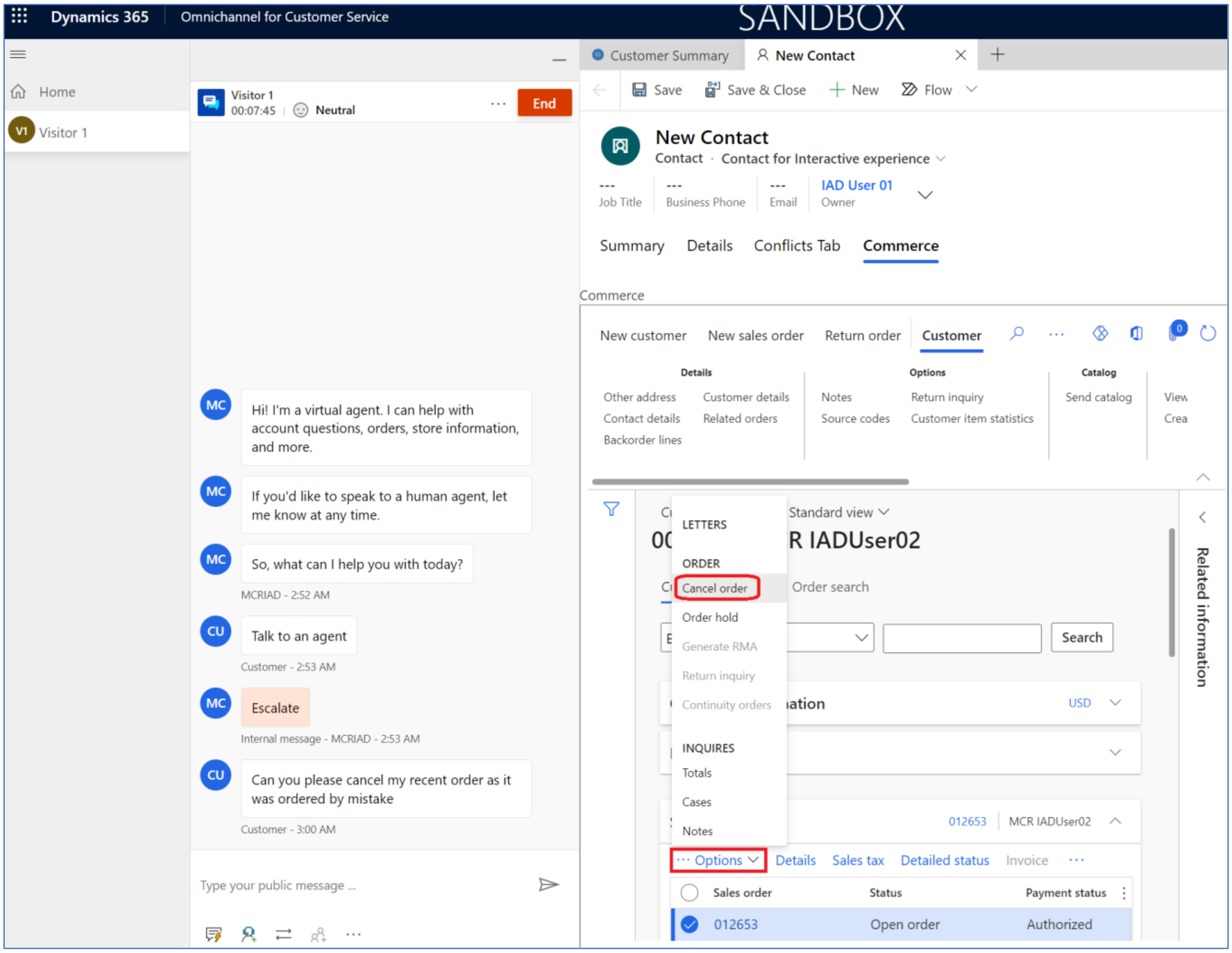
d) Select the customer and then click **Select** button.



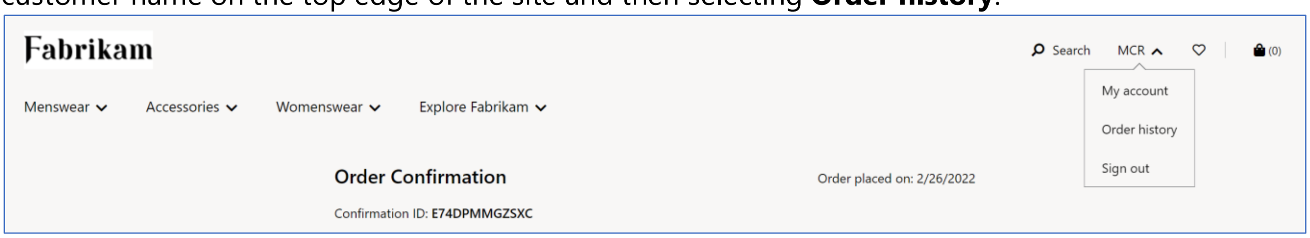
e) This should now populate the customer and its related details.

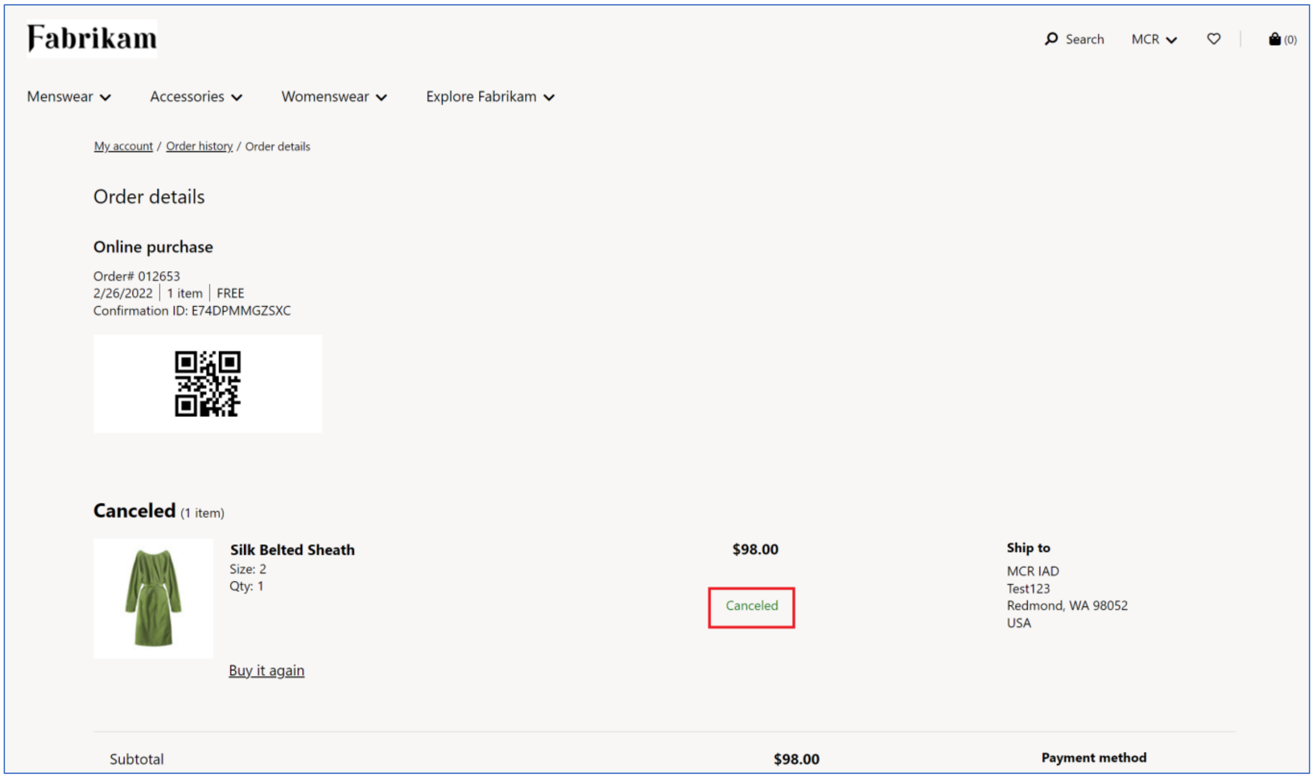


5. As a customer, from the e-commerce site chat widget, request the agent to cancel the recent order as it was mistakenly ordered.
6. As an agent, click on **Options** menu on the sales orders tab, select the recent sales order and then select **cancel order** which will cancel the order. The agent can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





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

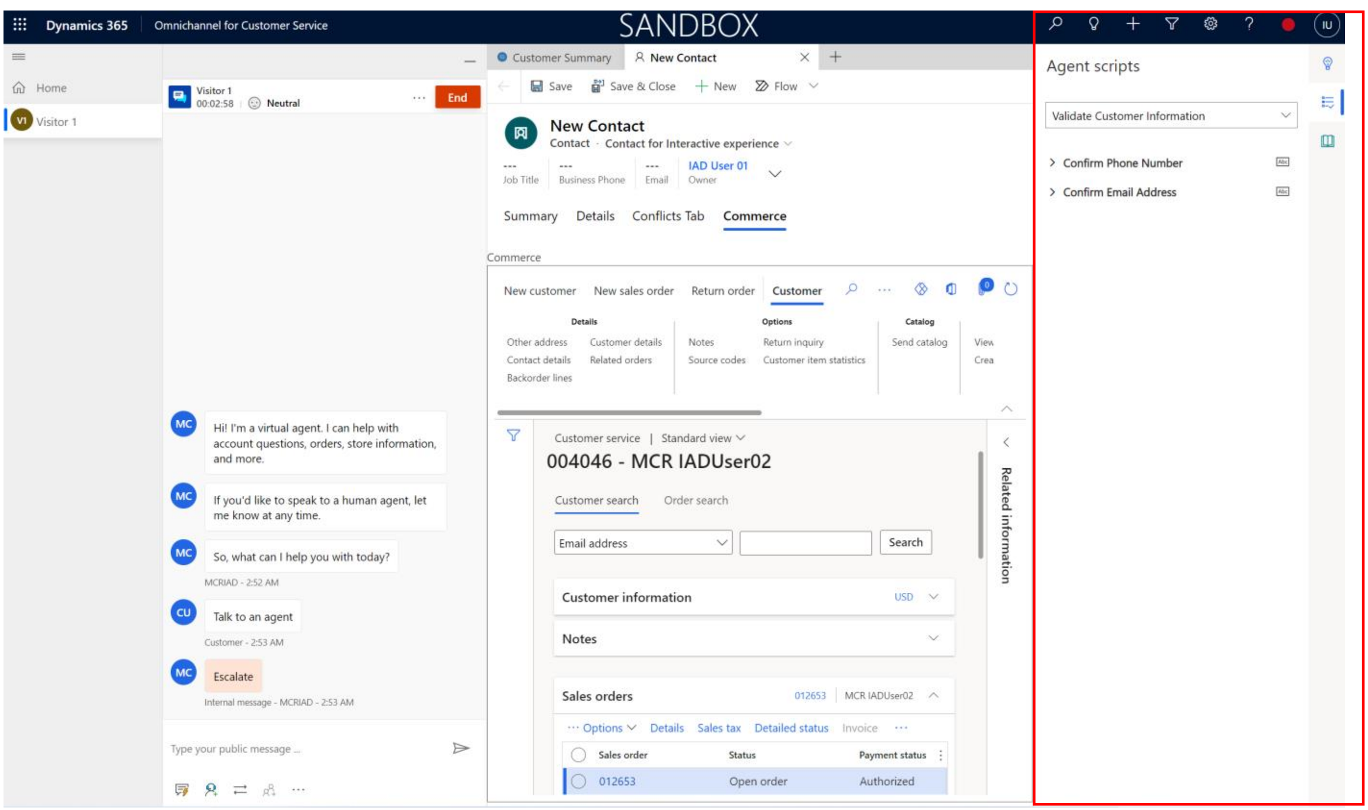
Fabrikam Retail wants to ensure they have proper tools in place to provide the best service and guidance during customer interactions.

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

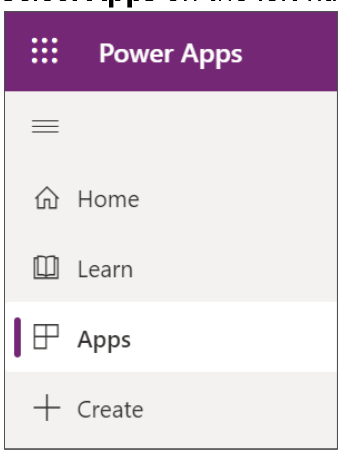
In this task, you will verify if assigned and if not assigned already, proceed to assign the necessary roles to your user to create and use agent scripts. Specifically, you will be adding the **Productivity tools administrator** and **Productivity tools user** roles. The Productivity tools administrator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

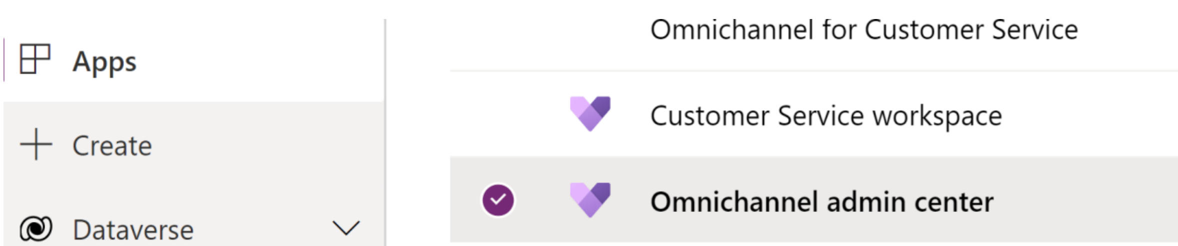
1. Using an In-Private or Incognito window, navigate to [Power Apps].

2. Select the correct environment from the upper right **Environment** drop down.

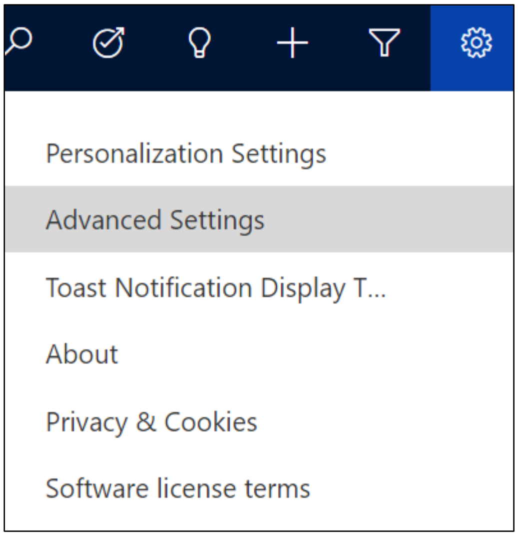
3. Select **Apps** on the left navigation bar.



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

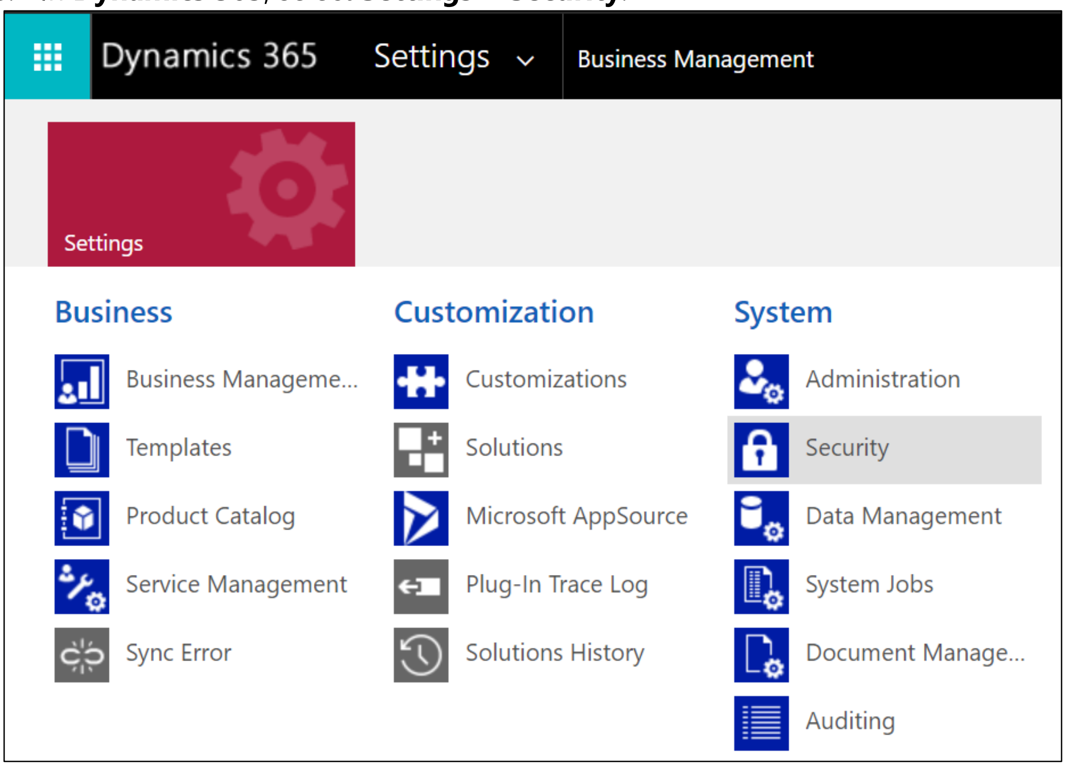


6. Select the **gauge icon** in the upper right corner and navigate to **Advanced Settings**.

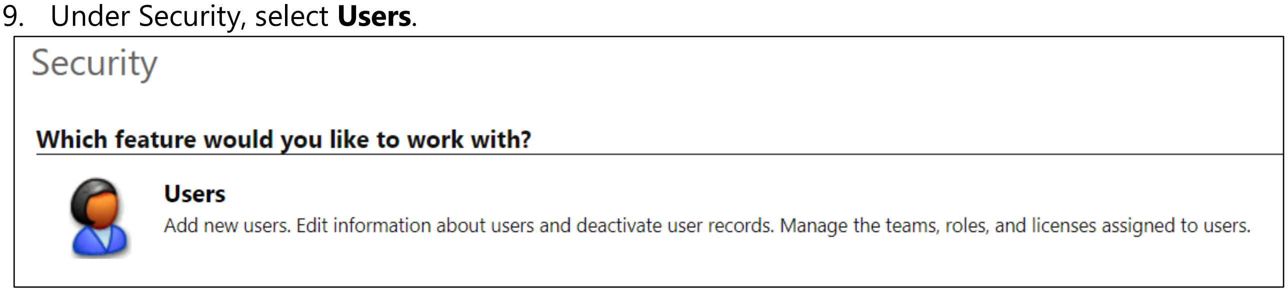


7. A new window should open and navigate to Dynamics 365. It may take a while to load. If it's been longer than a minute, stop and reload the page. It should then load faster.

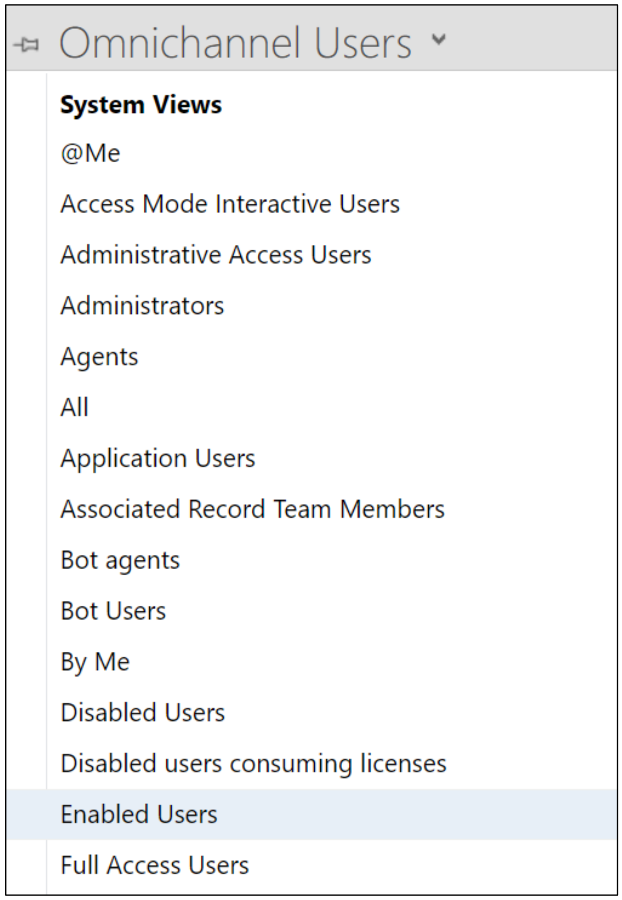
8. In **Dynamics 365**, select **Settings** > **Security**.



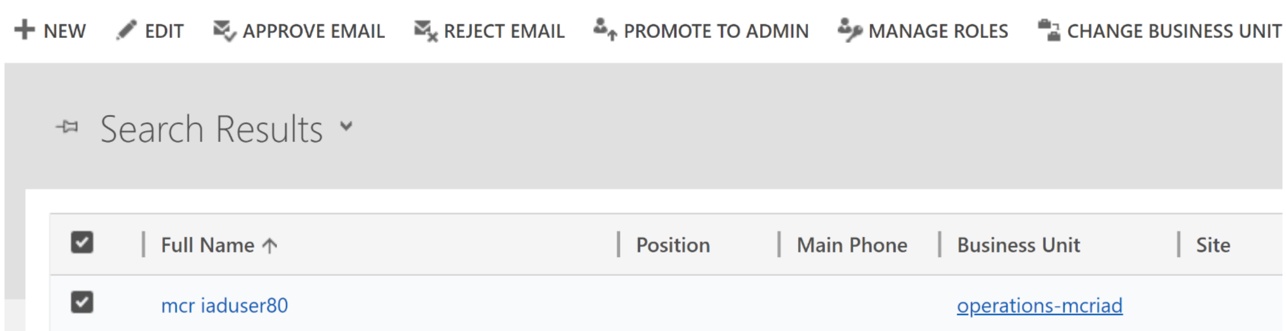
9. Under Security, select **Users**.



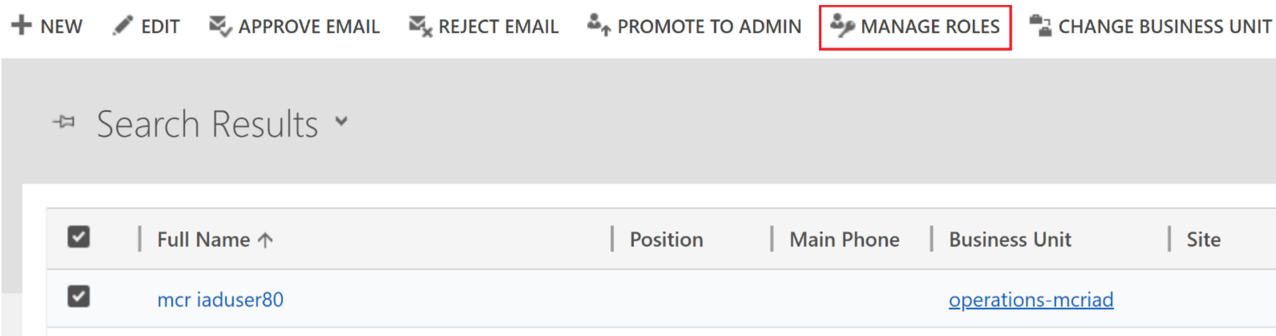
10. Switch the view drop down from Omnichannel Users to **Enabled Users** for the grid view so that your user will show in the list.



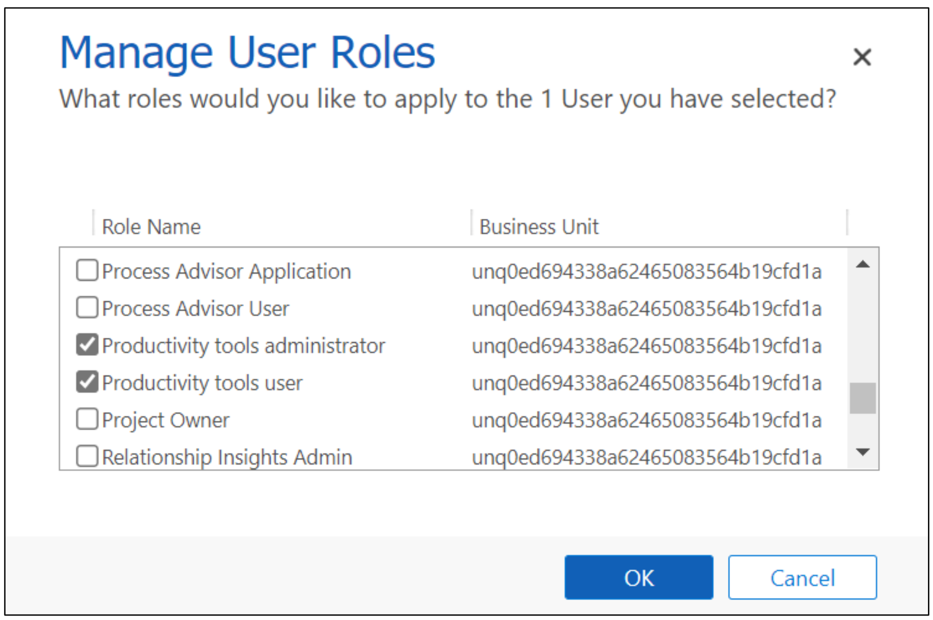
11. While in the Enabled User list, scroll down to **find your user** or use the **Search** bar.



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



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**



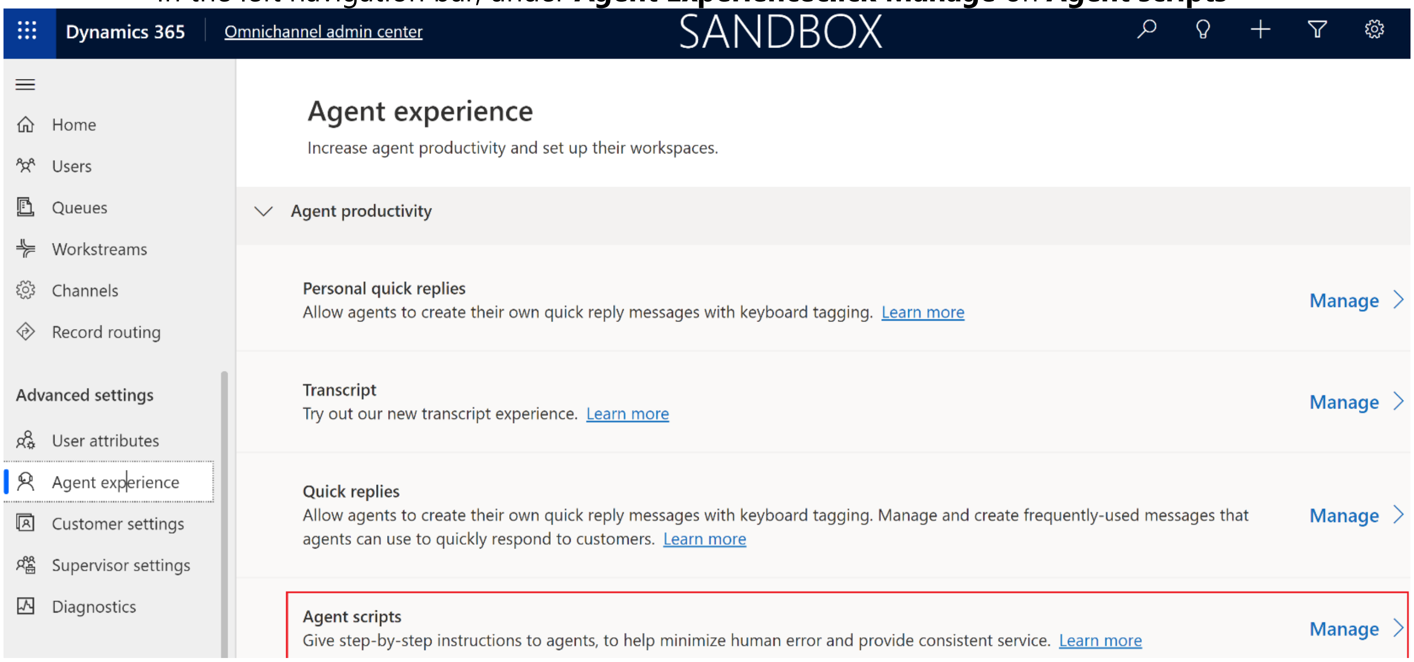
Note: You will assign more roles in this lab. It is recommended to leave the User screen open.

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

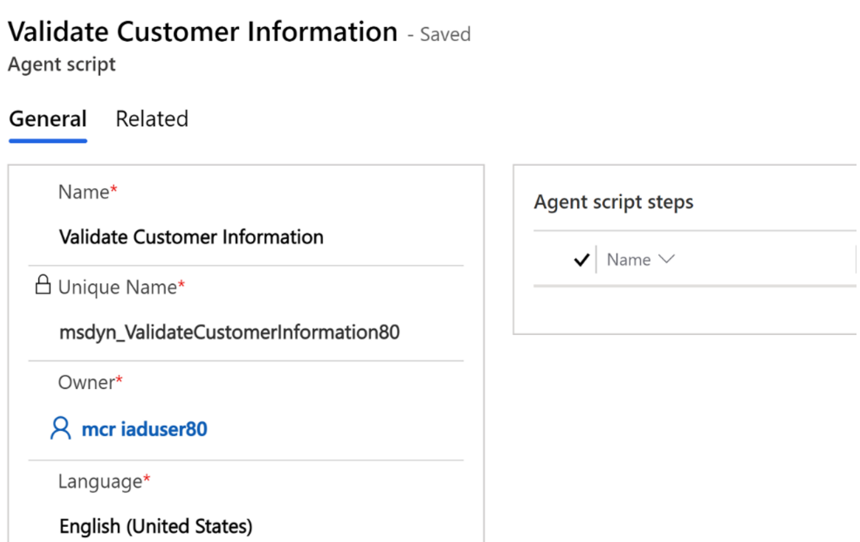
Task 2: Create an Agent Script

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.

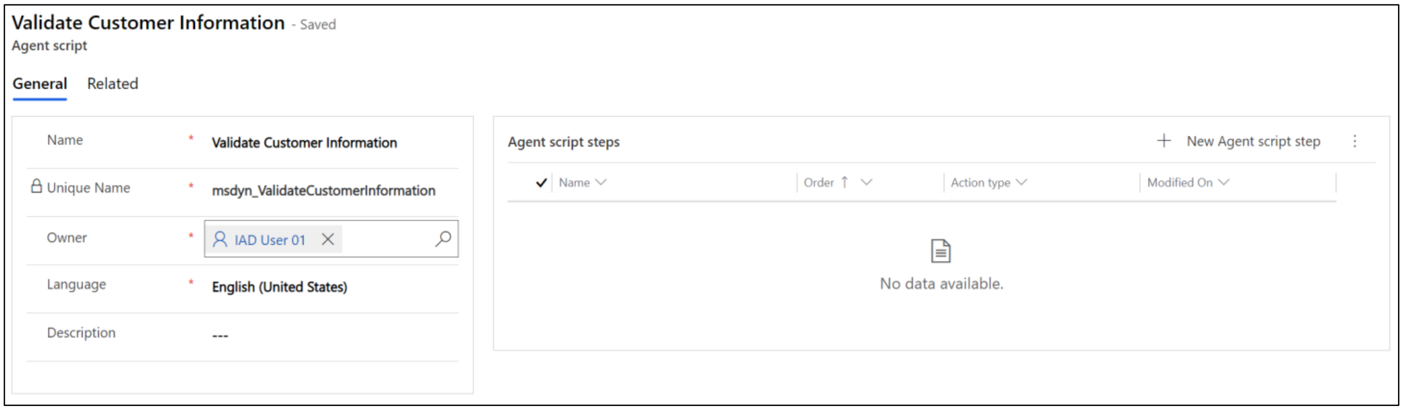
1. Navigate to **Omnichannel Admin Center** application which you opened in the first task.
   In the left navigation bar, under **Agent Experienceclick Manage** on **Agent scripts**



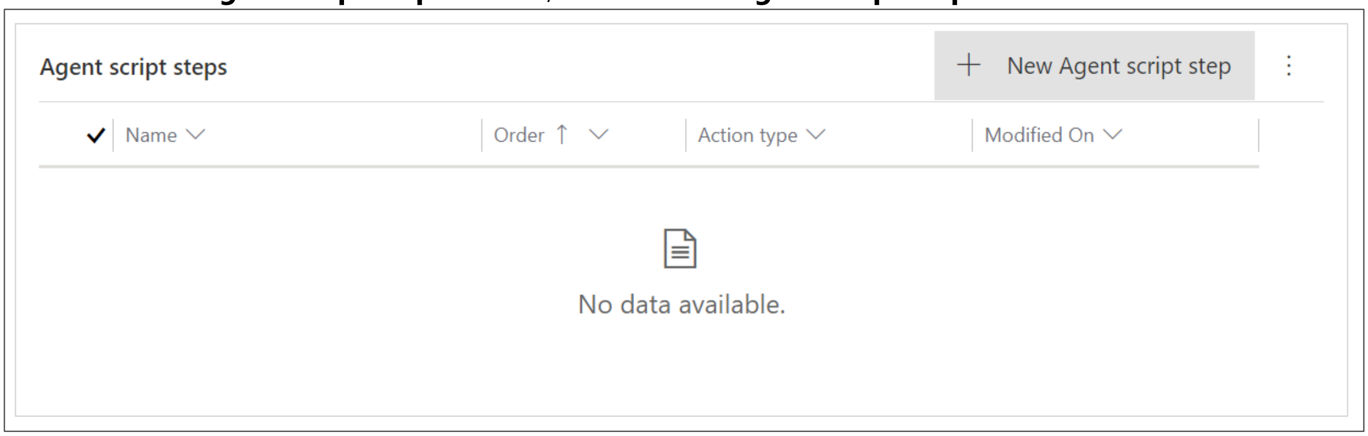
2. For the **New Agent script** record, specify the following:
   a. **Name:** Validate Customer Information <<UserName>>
   b. **Unique Name**: msdyn_ValidateCustomerInformation<<UserName>>



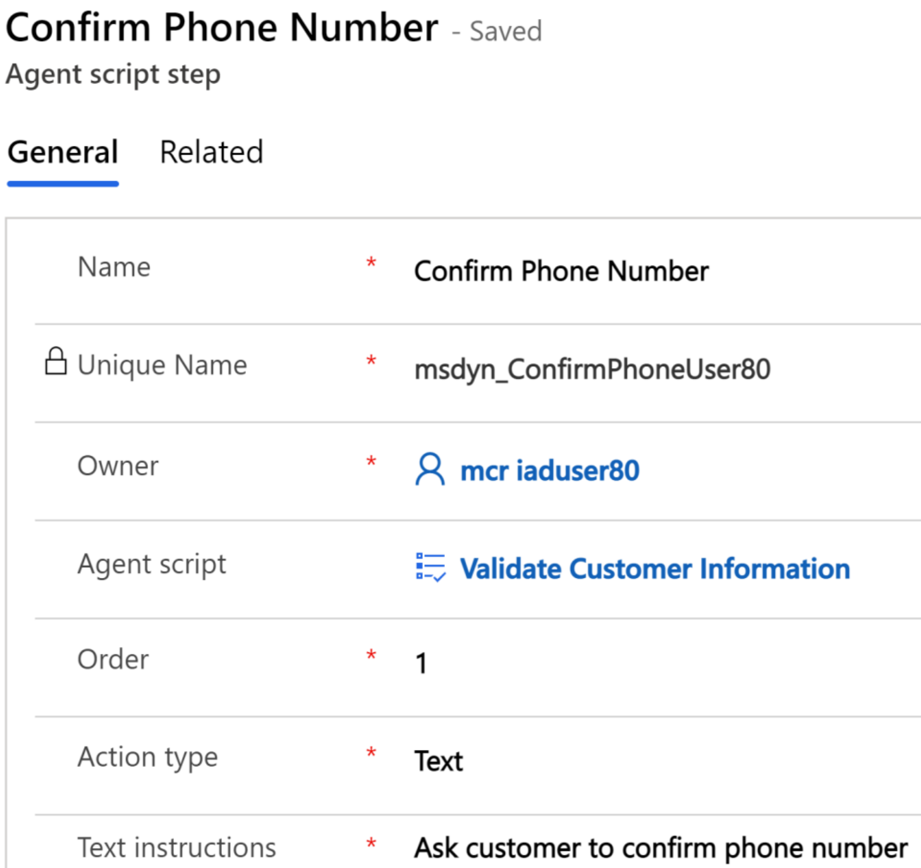
3. Click **Save**. The **Agent script steps** should appear on the right



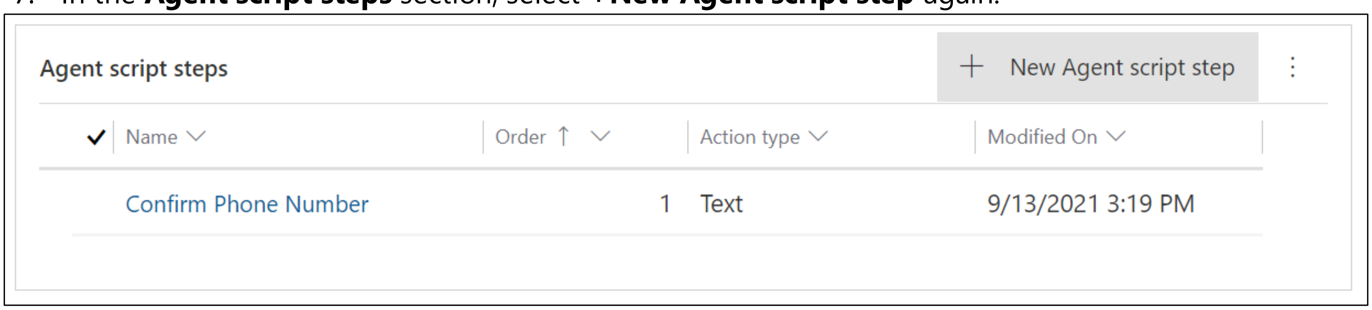
4. In the **Agent script steps** section, select **+New Agent script step**.



5. **Quick Create** form for the **Agent script step** appears. Specify the following fields:
   a. **Name:** Confirm Phone Number <<UserName>>
   b. **Unique Name**: msdyn_ConfirmPhone<<UserName>>
   c. **Order**: 1
   d. **Action type**: Text
   e. **Text instructions**: Ask the 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.



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

Confirm Email Address - Saved

Agent script step

General Related

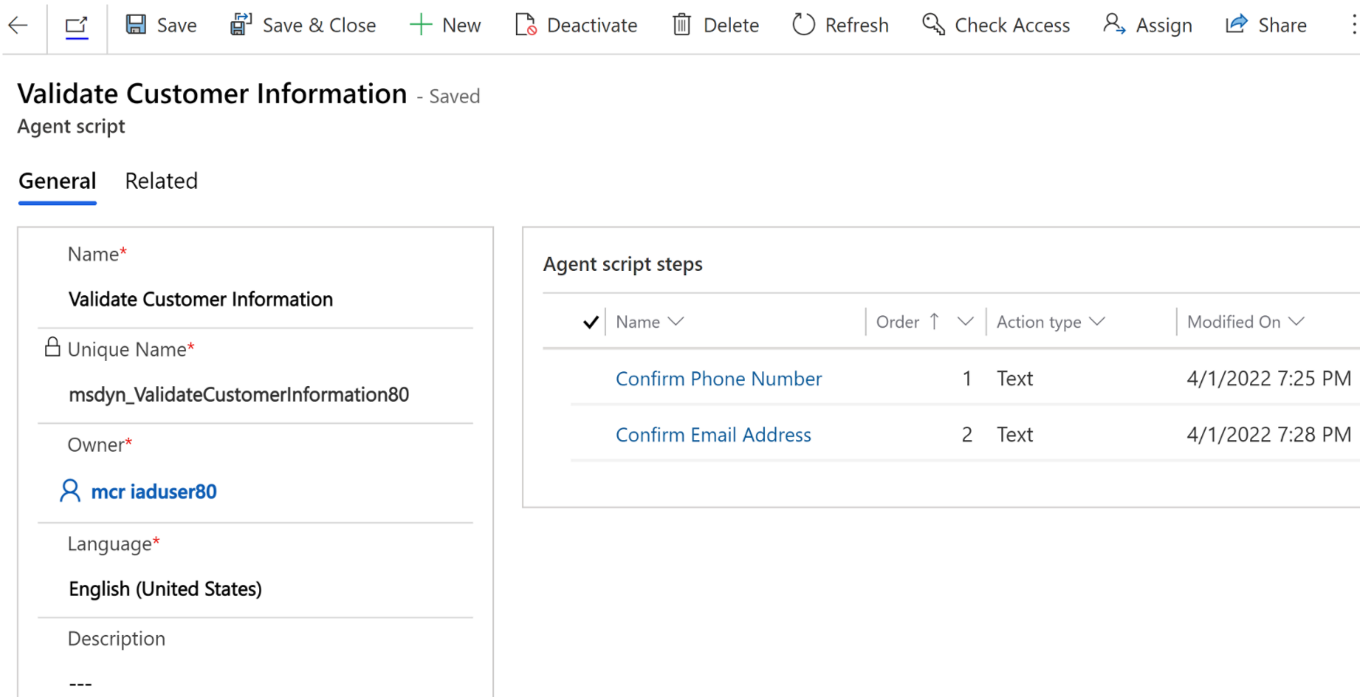
Name	*	Confirm Email Address
Unique Name	*	msdyn_ConfirmEmailAddressUser80
Owner	*	mcr iaduser80
Agent script		Validate Customer Information
Order	*	2
Action type	*	Text
Text instructions	*	Ask Customer for Email Address. Verify their response matches information on file

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

Agent script steps

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

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

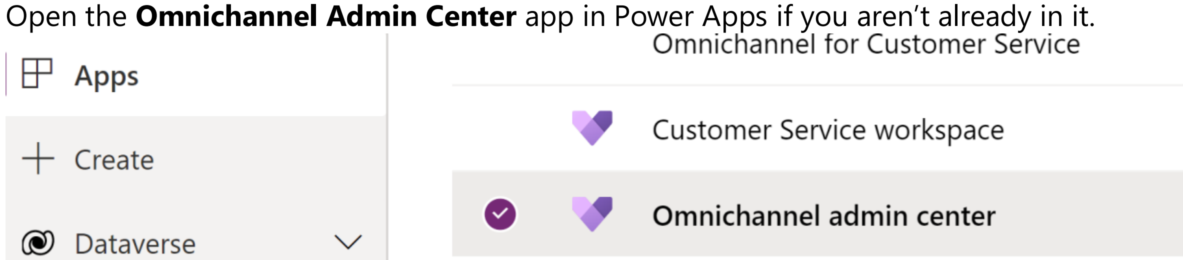


Congratulations! You have completed creating an agent script with two steps to validate customer information, including phone number and email address.

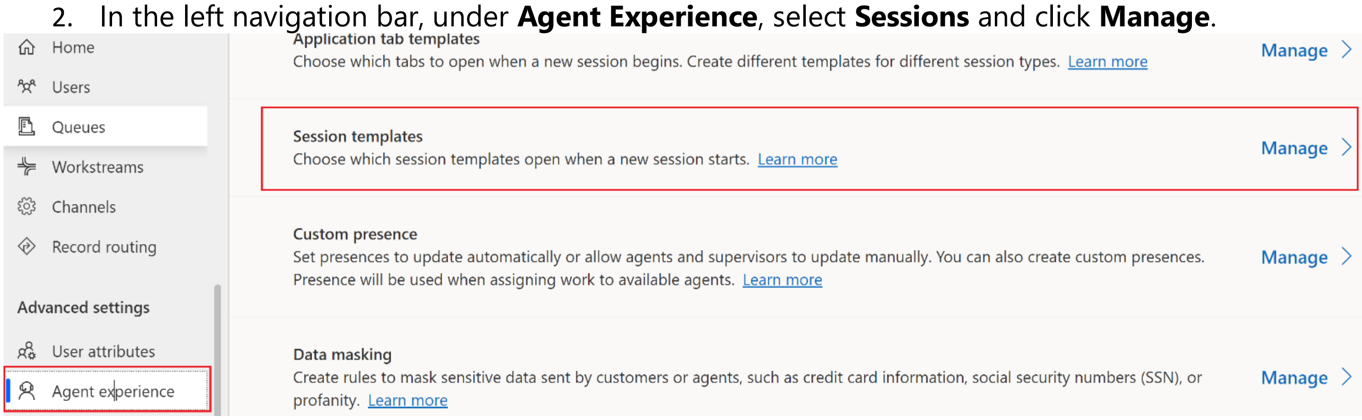
Task 3: Create a Session Template and associate the Agent Script to it

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.

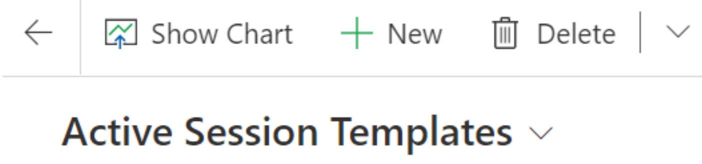
1. Open the **Omnichannel Admin Center** app in Power Apps if you aren't already in it.



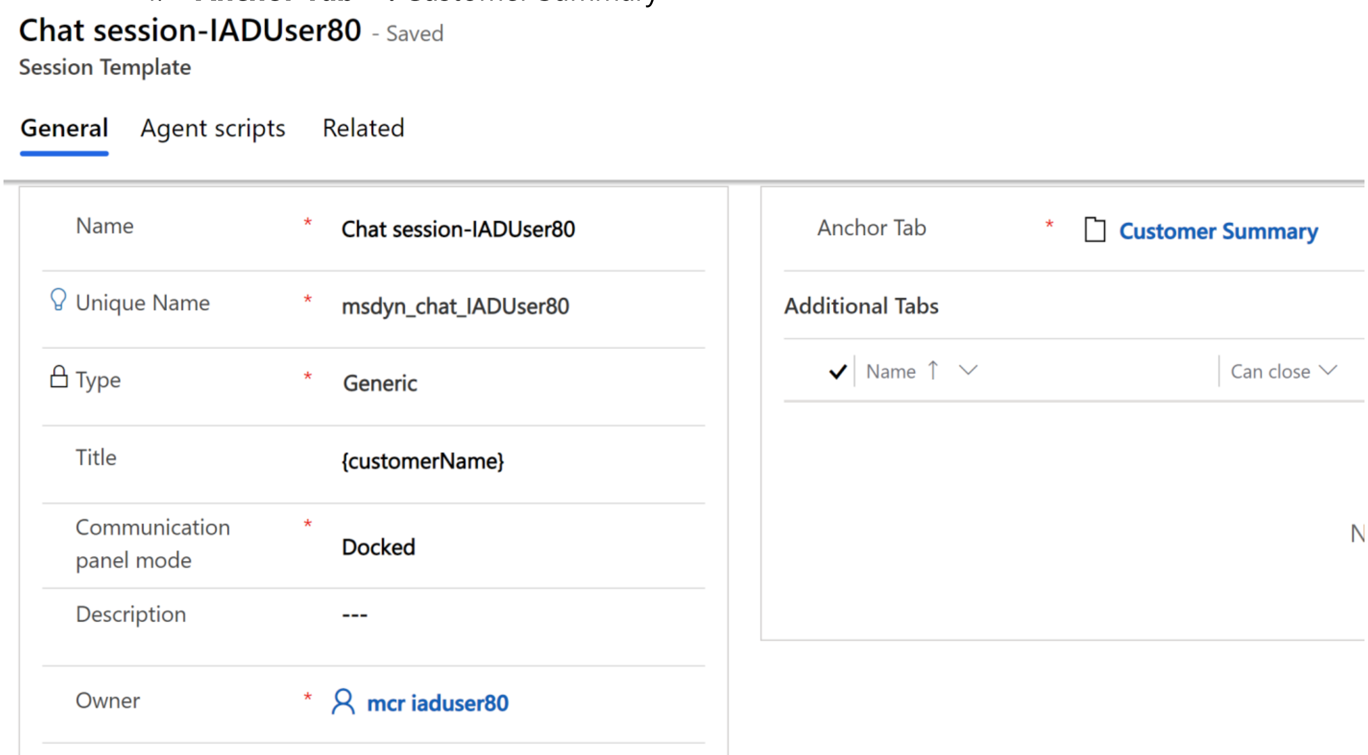
2. In the left navigation bar, under **Agent Experience**, select **Sessions** and click **Manage**.



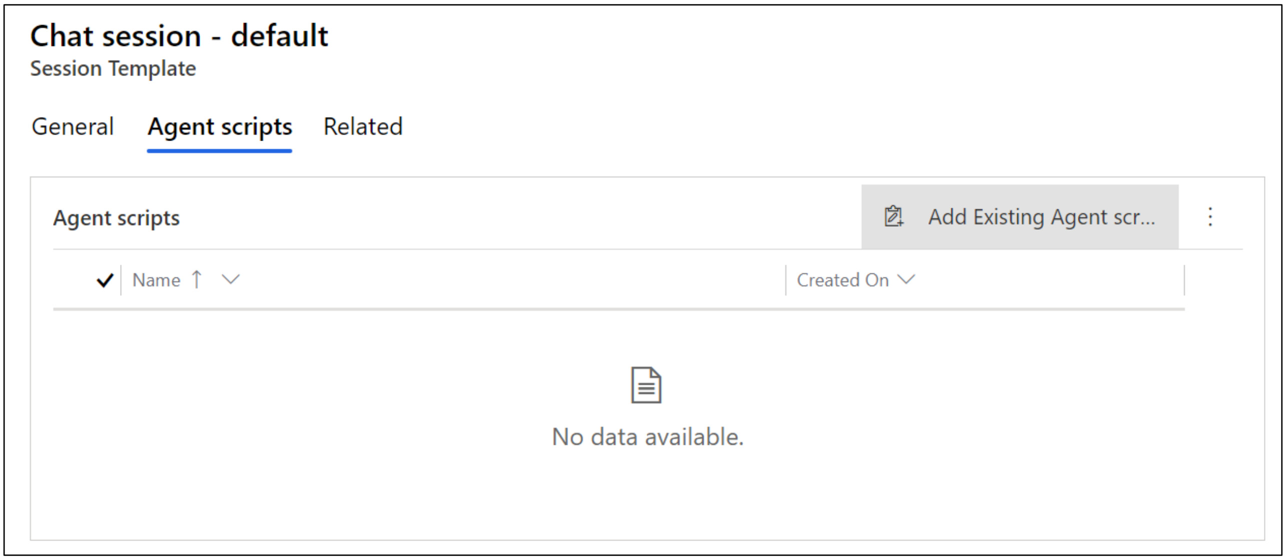
3. Select **+New** to create a new session template.



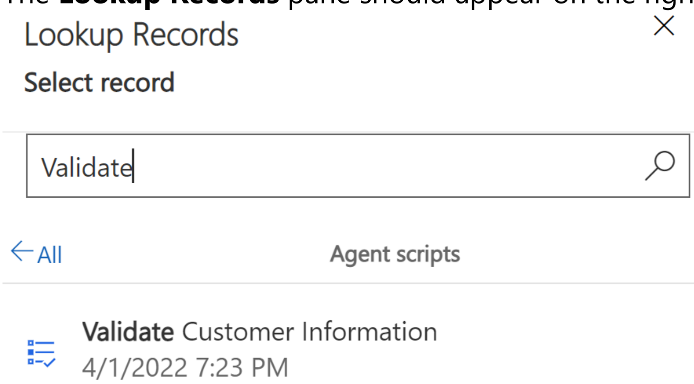
4. Specify the following fields:
   a. **Name** : Chat session - <<UserName>>
   b. **Unique Name:** msdyn_chat_<<UserName>>
   c. **Type** : Generic
   d. **Title** : {customerName}
   e. **Description** : This is the session template for <<UserName>> chat channel.
   f. **Anchor Tab** : Customer Summary



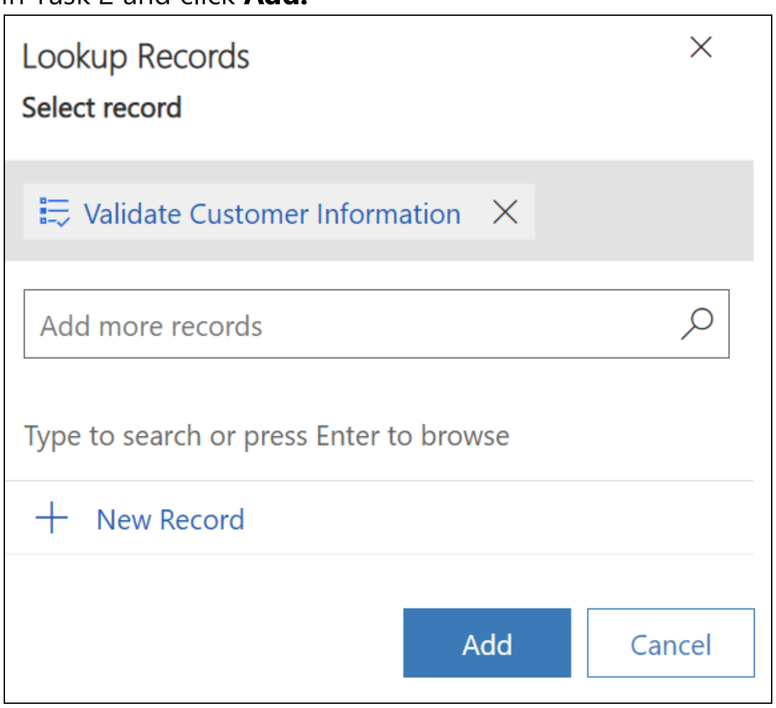
5. Select the **Save** button on the command bar.
6. Select the **Agent scripts** tab. In the **Agent scripts** section, select **Add Existing Agent script**.



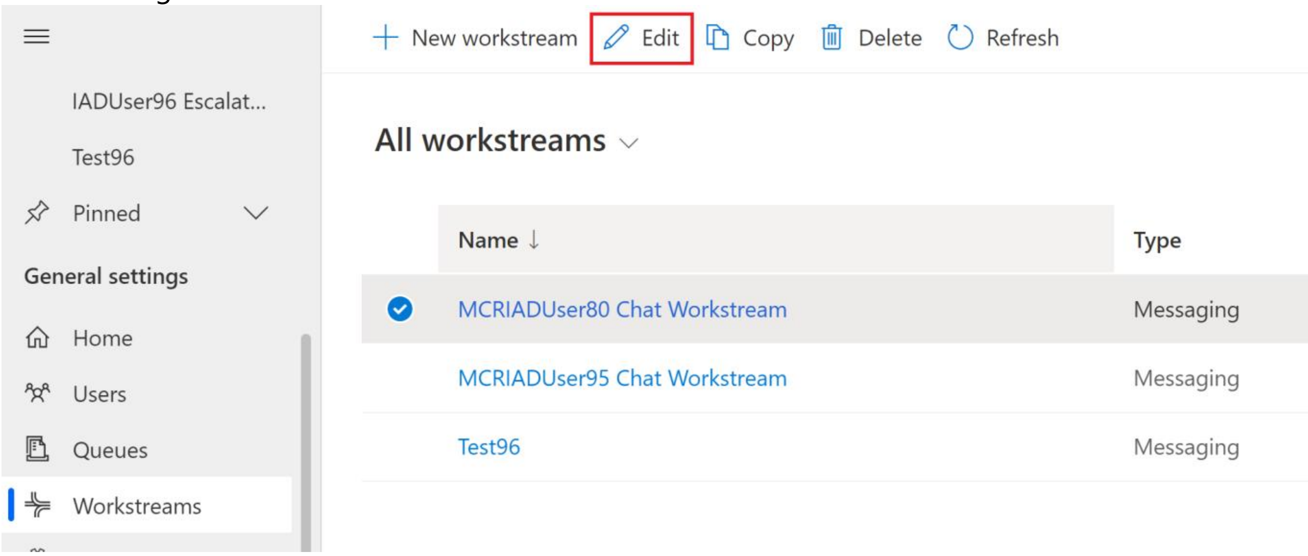
7. The **Lookup Records** pane should appear on the right.



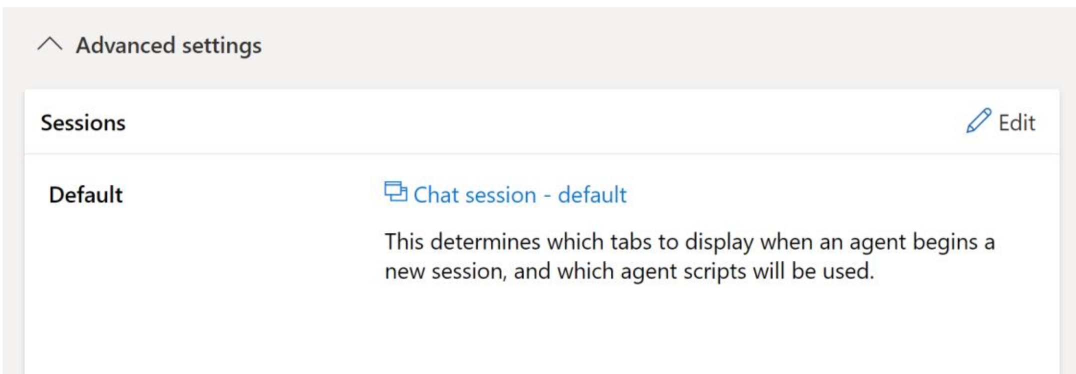
8. Select the **Validate Customer Information** <<UserName>> agent script from the list that you created in Task 2 and click **Add.**



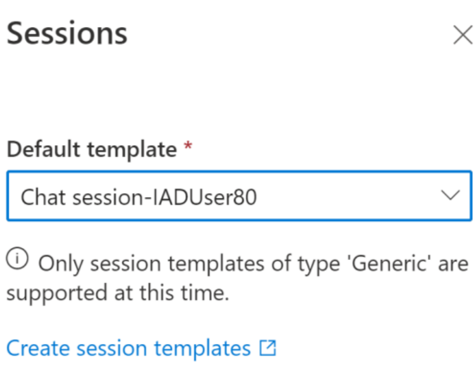
9. Navigate to **Work Streams.**



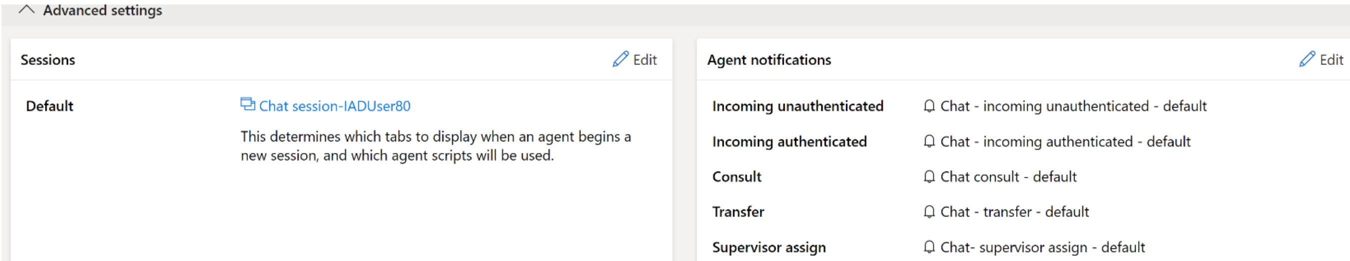
10. Select the workstream created in Exercise 1 – Task 3 and click Edit.
11. Scroll down to **Advanced settings> Sessions** and click edit to choose the session template



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



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



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.*

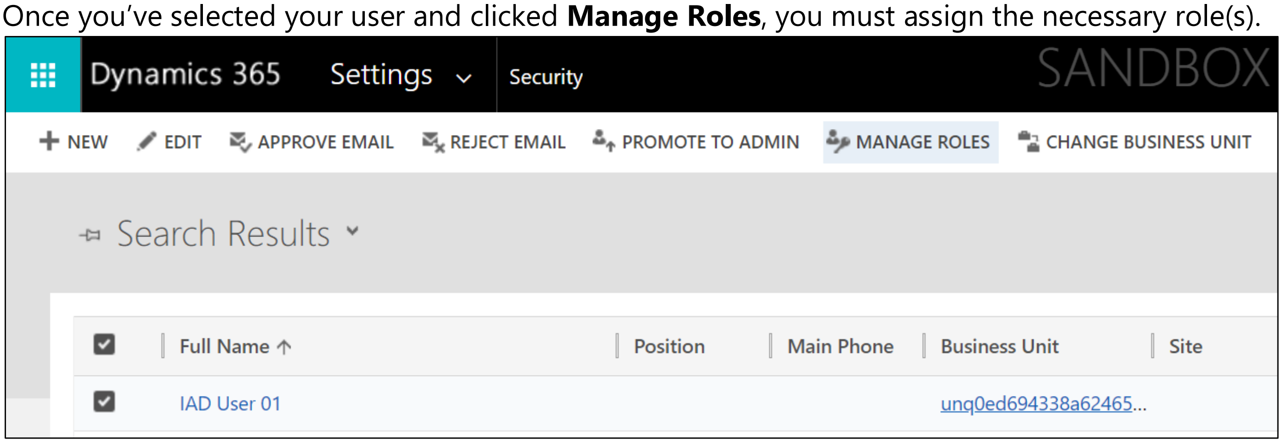
In this exercise, you will learn how to create and manage **Knowledge Articles** that can address any number of issues your customers would like to discuss during the Omnichannel Customer Service conversation. These knowledge articles will appear in the productivity pane in Omnichannel for Customer Service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

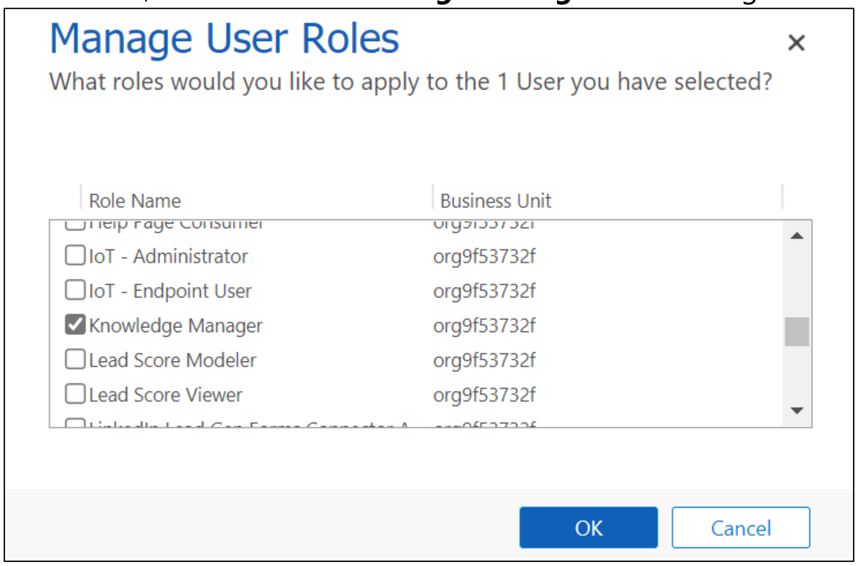
1. If you kept the User Settings page up from the previous exercise, navigate to that page. If you didn't leave it open, follow all the steps in Exercise 2, Task 1 and then return here to assign the proper role.

2. Once you've selected your user and clicked **Manage Roles**, you must assign the necessary role(s).

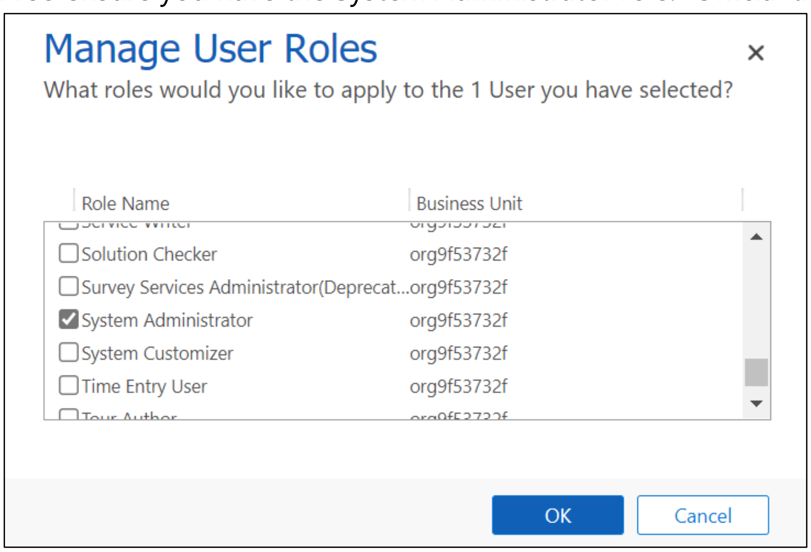


3. There are three roles you can choose with [create/read permissions for Knowledge Articles](#).
    i. Knowledge Manager
    ii. Customer Service Representative

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.

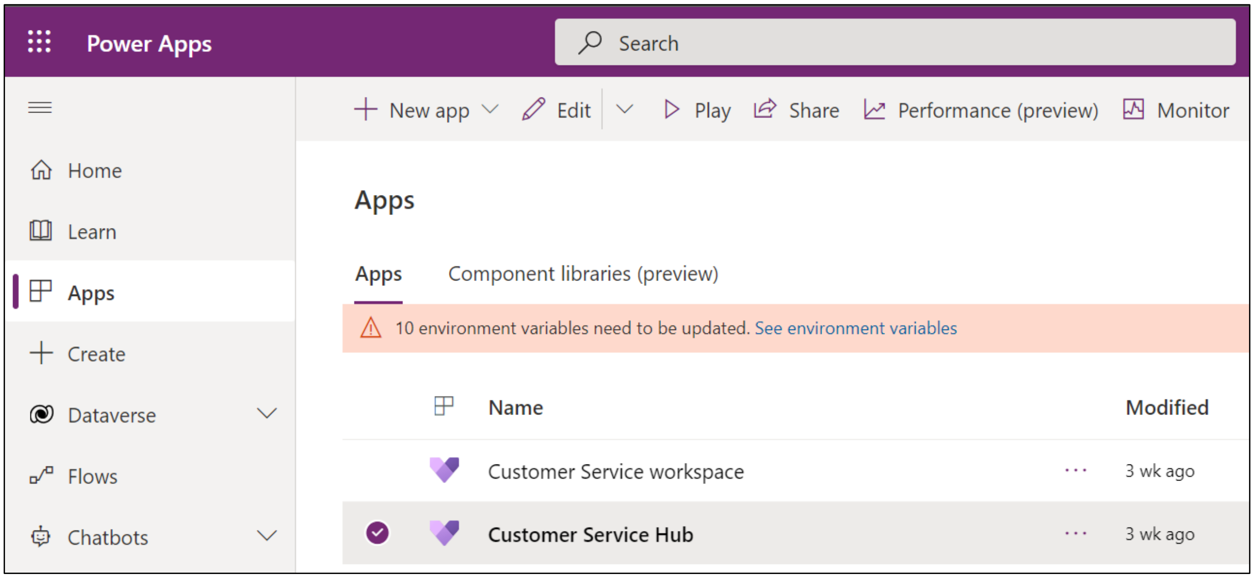


6. Select **OK** to close the Manage User Roles window and accept changes.

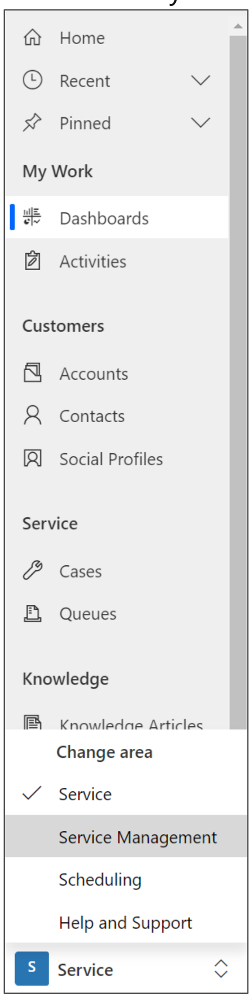
Congratulations! You have assigned the proper roles to create and read knowledge articles.

Task 2: Set up Knowledge Management Settings

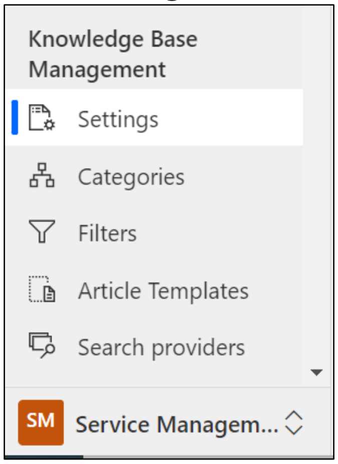
1. In Power Apps, open the **Customer Service Hub** app.



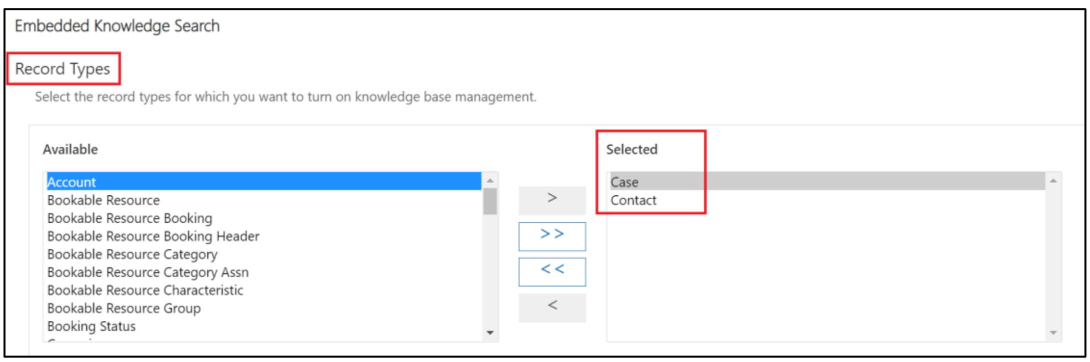
1. In Customer Service Hub**,** on the left navigation bar, go to the bottom left corner where there's a drop down that says **Service**. Select it and change the area to **Service Management**.



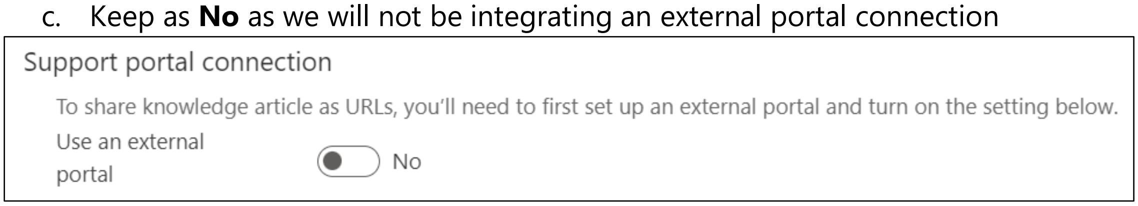
2. Once in in the Service Management area, scroll down to **Knowledge Base Management** section and select **Settings** in the left navigation**.**



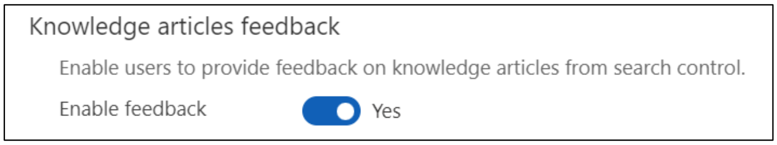
3. **Record Types** allows you to configure the record types you want to turn on for knowledge management.
   a. The list will include all entities that are available for an N:N relationship.
   b. Knowledge management is enabled for **Case** table by default. Because our scenario will also use the Case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



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



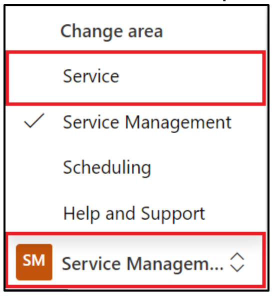
5. In the **Knowledge Articles Feedback** section, set **Enable users to provide feedback on knowledge articles from search control** to **Yes**. This will allow users to provide feedback on knowledge articles opened from knowledge search control.


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

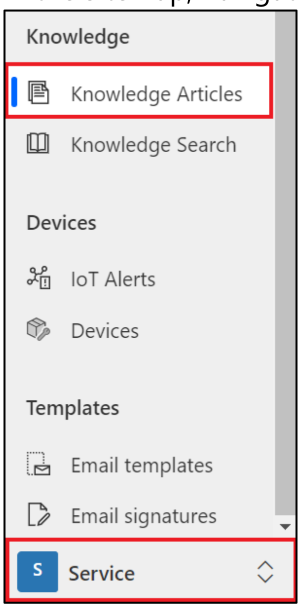
Task 3: Create Knowledge Article

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

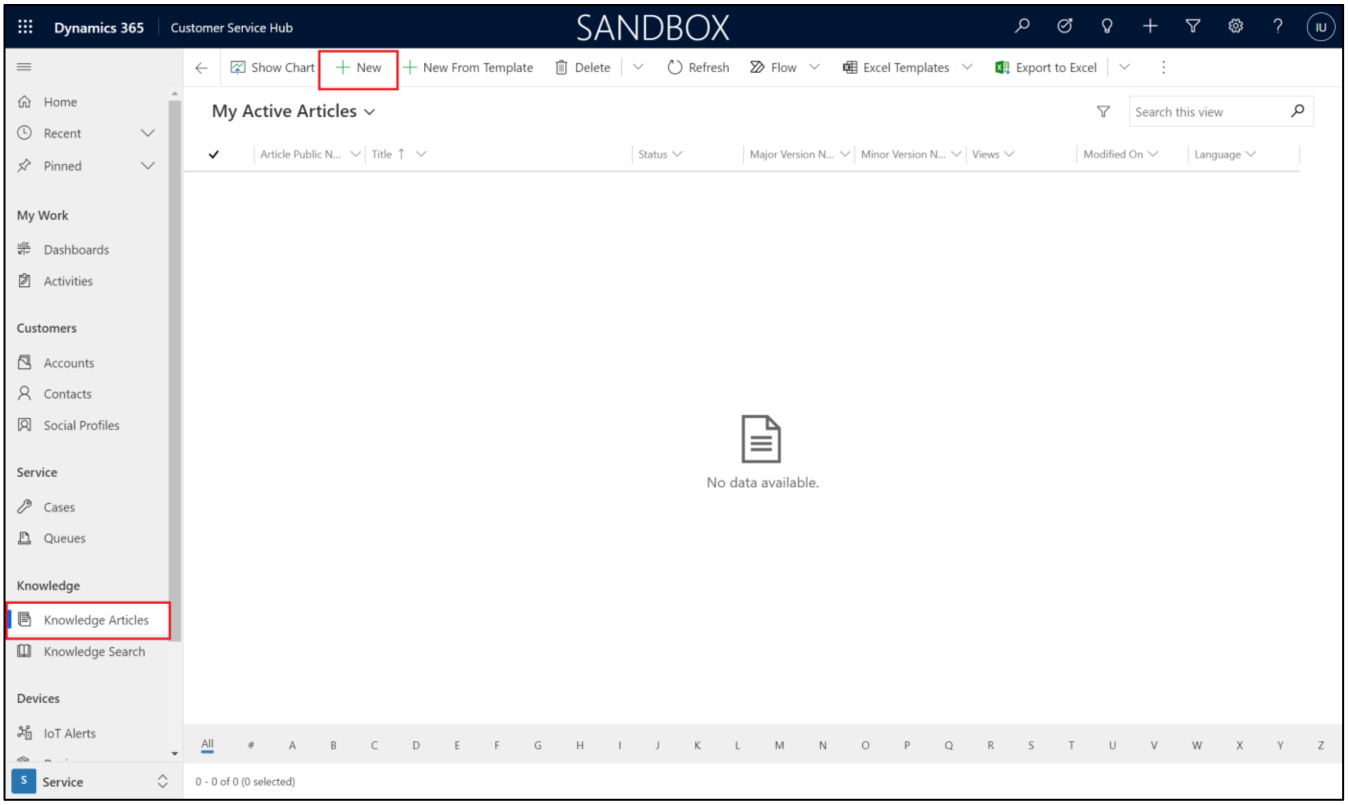
1. In **Customer Service Hub,** on the left navigation bar, go to the bottom left corner where you previously modified the drop down. Change it back from Service Management to **Service**.



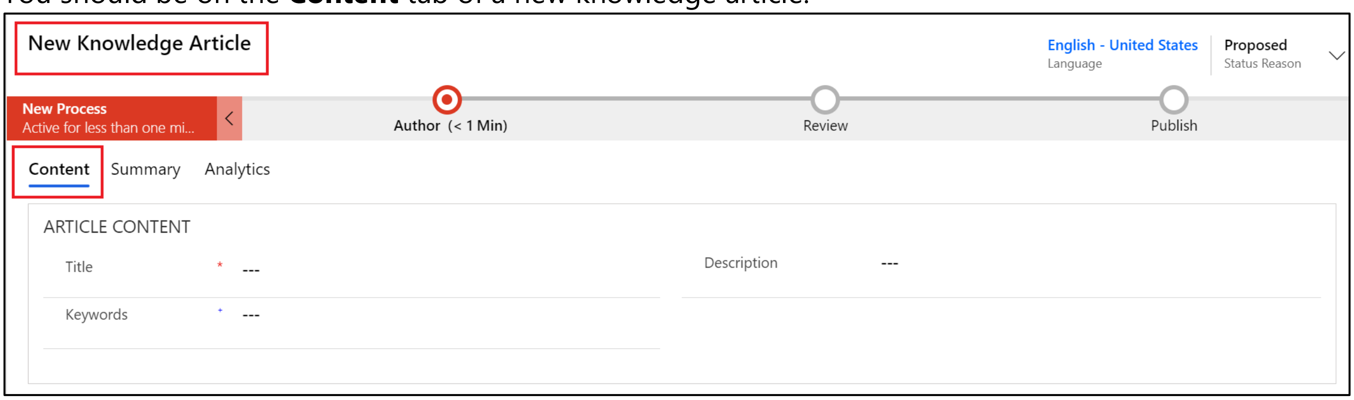
2. In the sitemap, navigate to **Service** > **Knowledge Articles**.



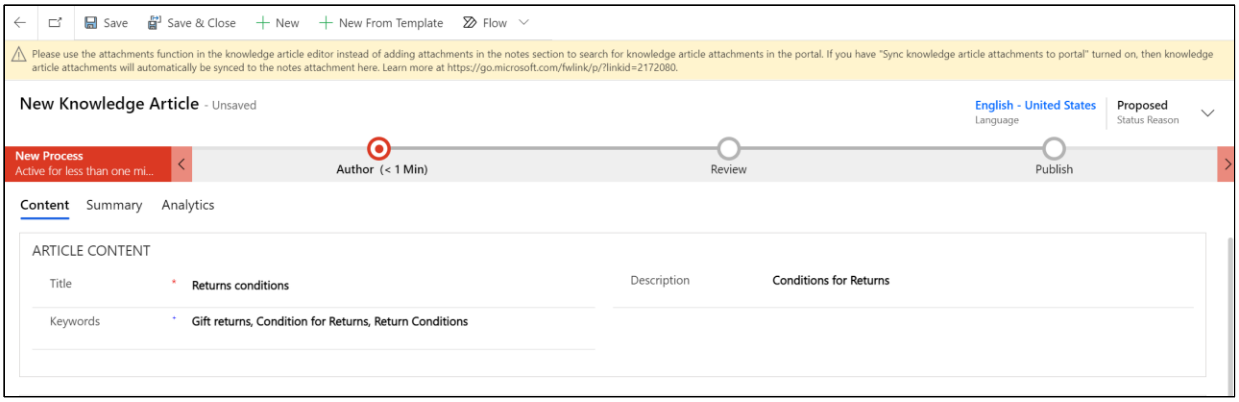
3. Select **New on the command bar**.



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



5. On the **Article Content section** tab of the new knowledge article, specify the following details:
   a. **Title**: Returns conditions IADUser <<UserNumber>>
   b. **Keywords**: Gift returns, Condition for Returns, Return Conditions
   c. **Description**: Conditions for Returns



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 follo wing address:

[ADDRESS]

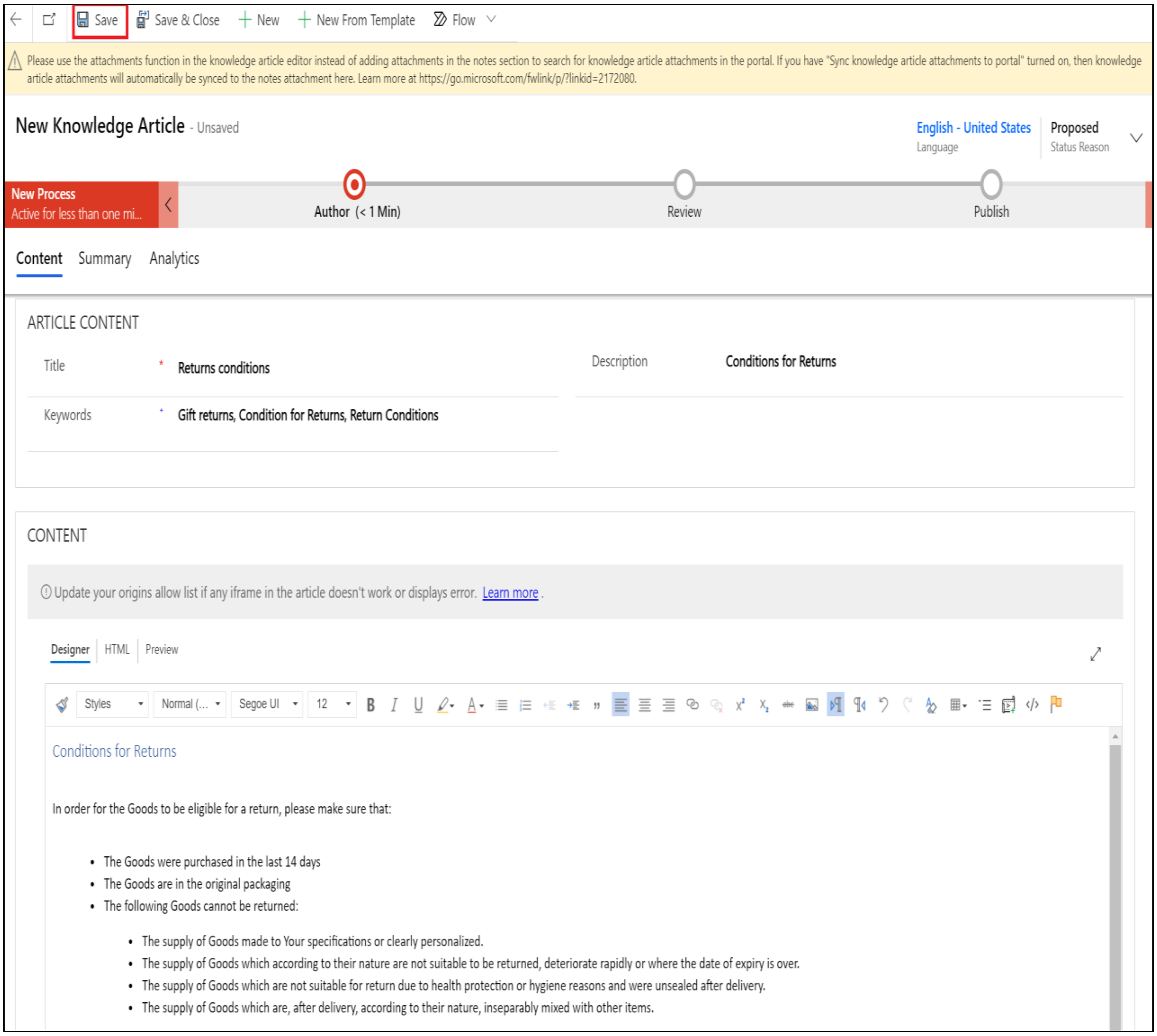
We cannot be held responsible for Goods damaged or lost in return shipment. Therefore, We recommend an insured and trackable mail service. We are unable to issue a refund without actual receipt of the Goods or proof of received return delivery.

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.

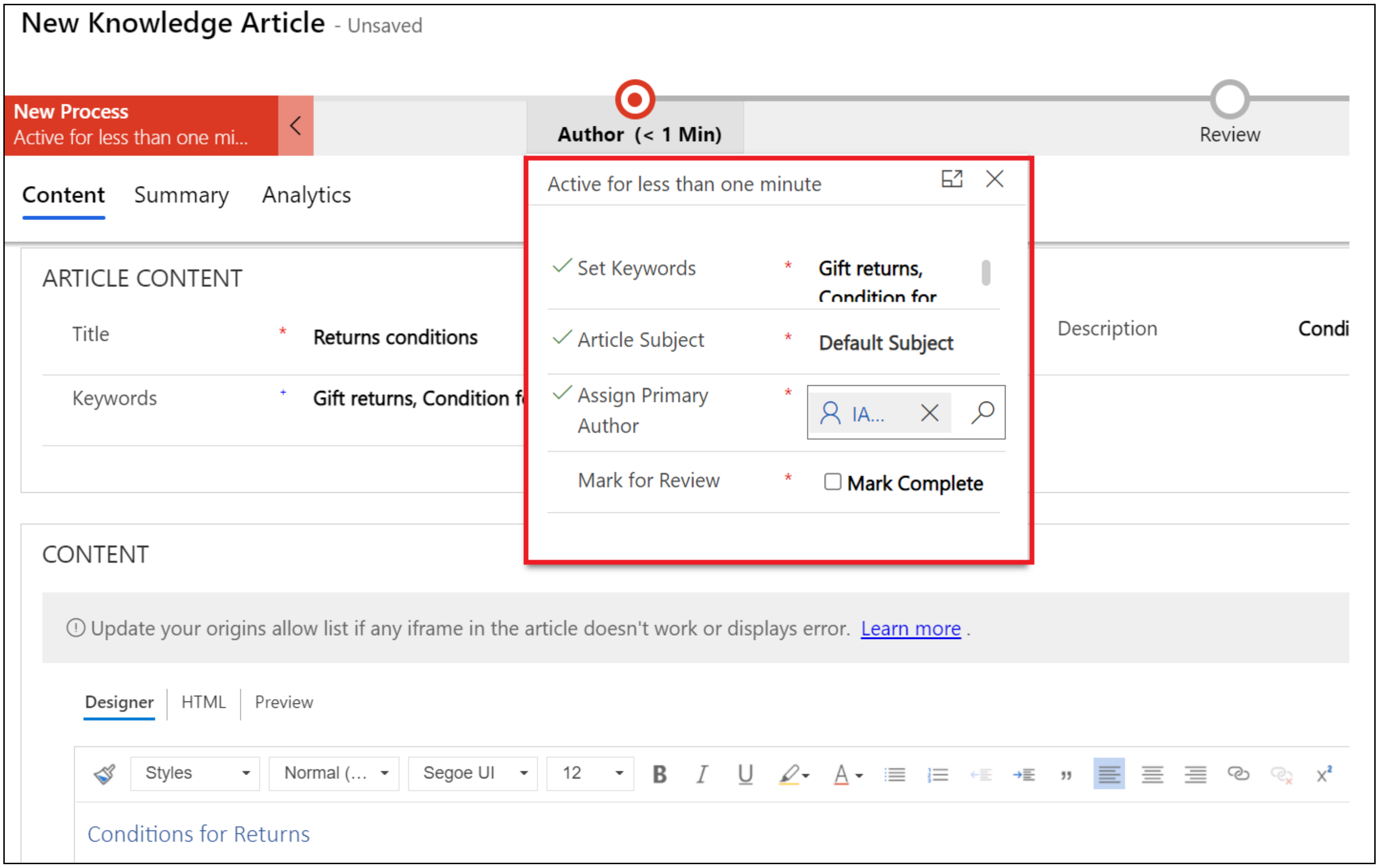
If the Goods weren't marked as a gift when purchased, or the gift giver had the Order shipped to themselves to give it to You later, We will send the refund to the gift giver.

6. Select **Save**.

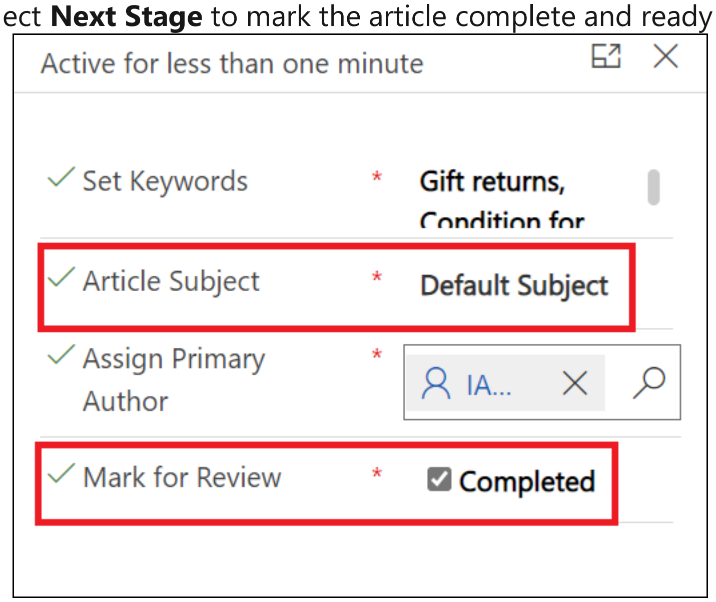


The Business Process flow bar at the top of the form helps you to drive the article towards completeness. You have the option to customize the stages in the Business Process flow to suit your requirements. We will now complete the author stage so it can move into review.

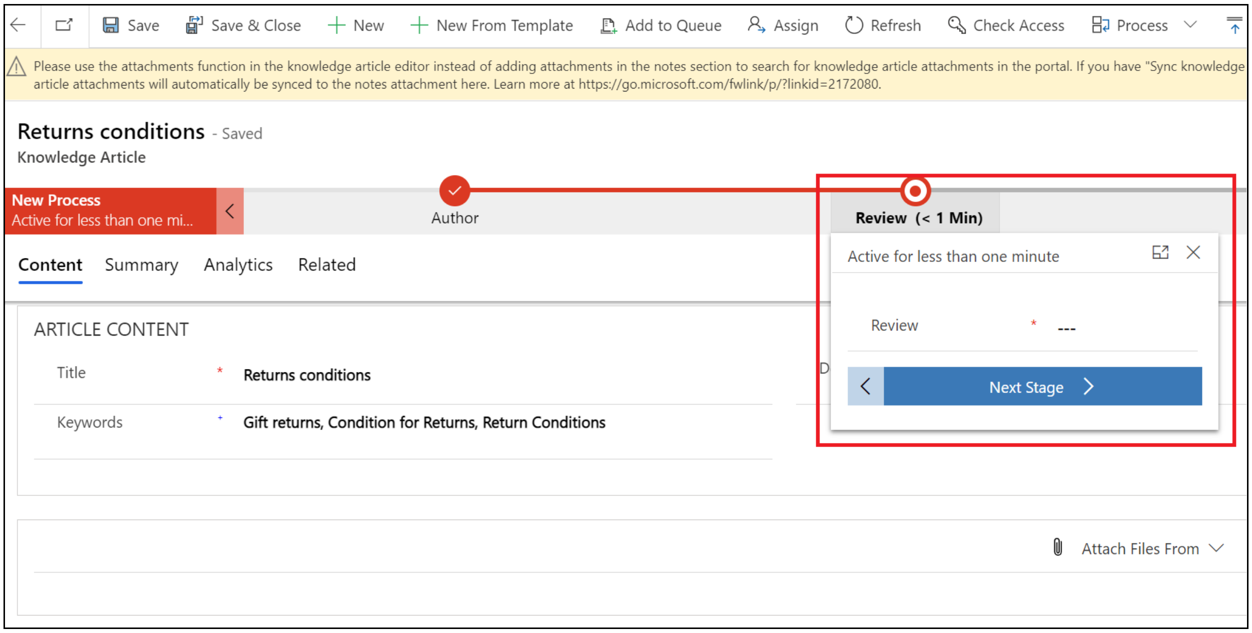
7. On the Business process bar, select **Author**. The business step options should pop out below.



a) Add the **Article Subject:** Default Subject. This is the subject of the article to help with searches.
b) Check the box for **Mark for Review** as Mark Complete.
c) 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.
d) Select **Next Stage** to mark the article complete and ready for review.



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

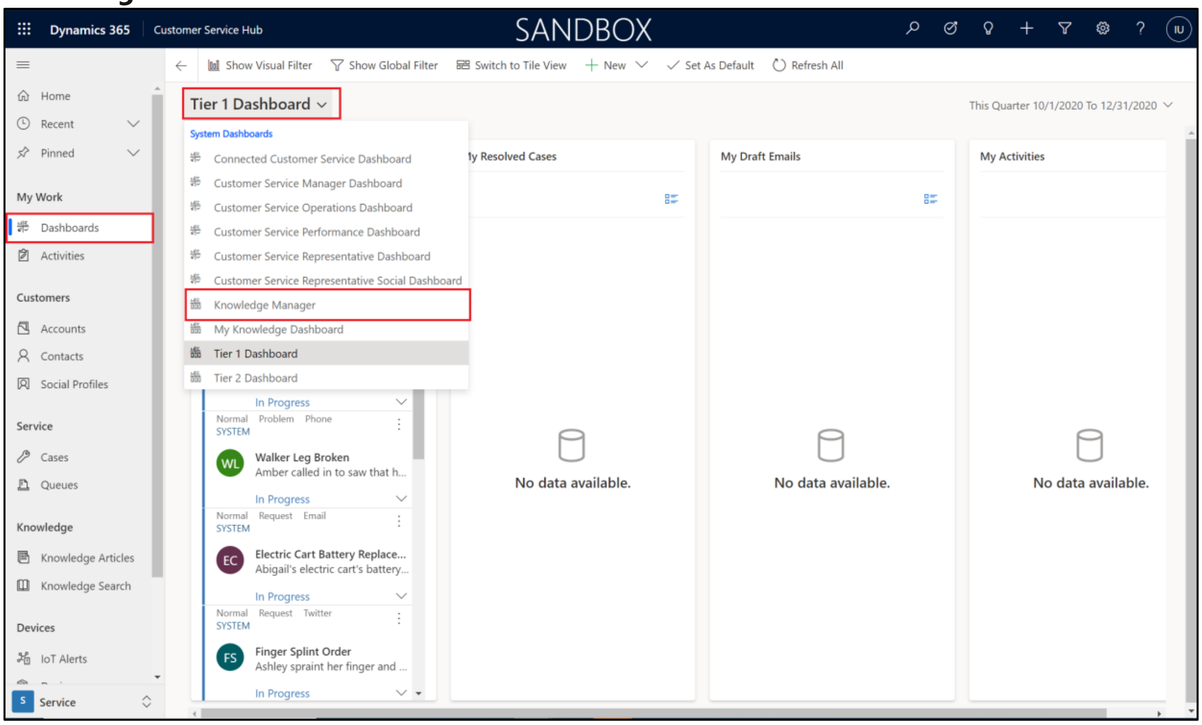


Congratulations! You have successfully created a knowledge article for Returns conditions and marked it for review.

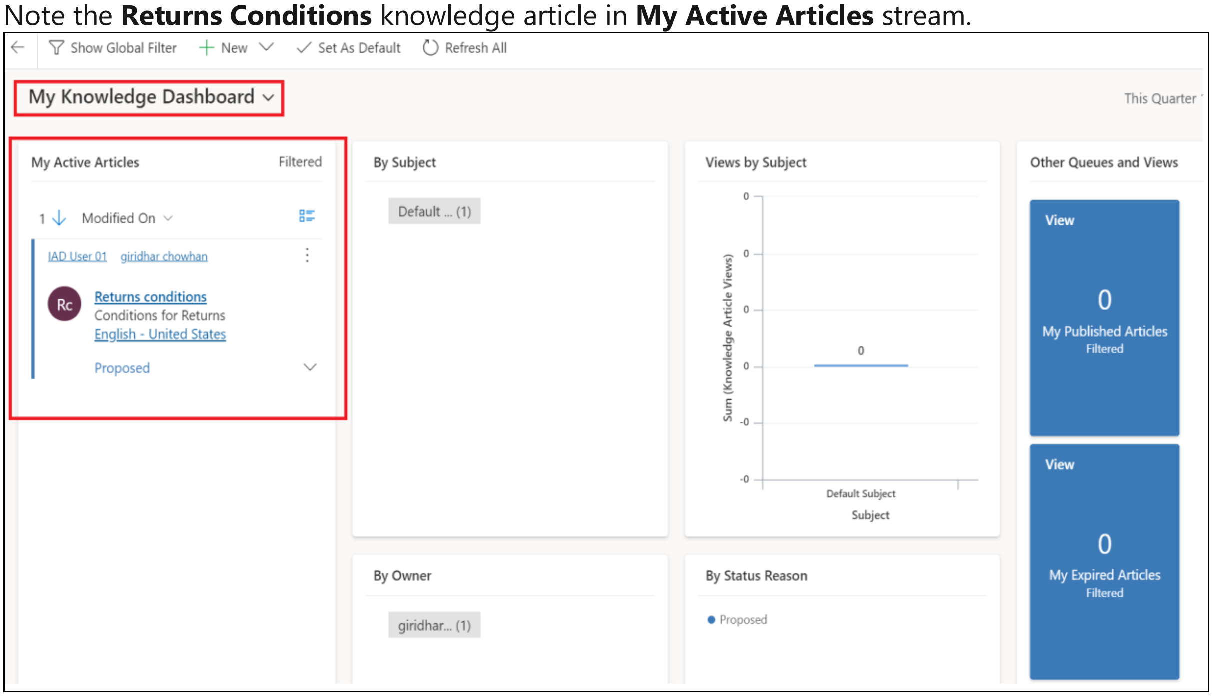
Task 4: Review and Publish Knowledge Article

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.

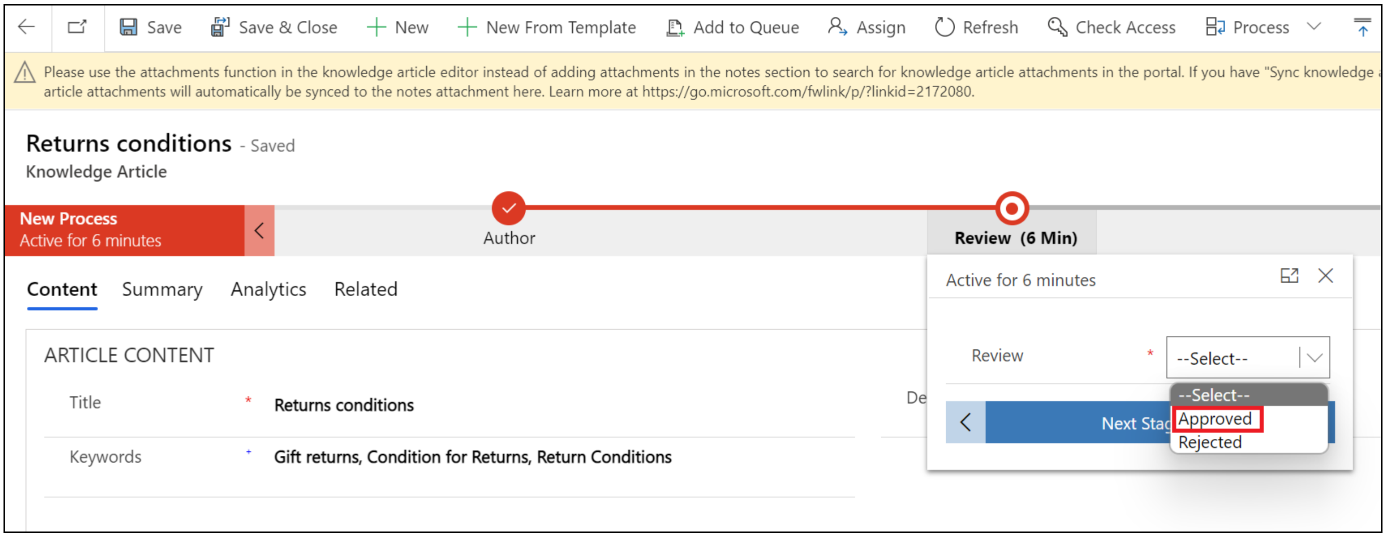
1. In Customer Service Hub, navigate to **Service** > **Dashboards and use the drop-down to choose the My Knowledge Dashboard.**



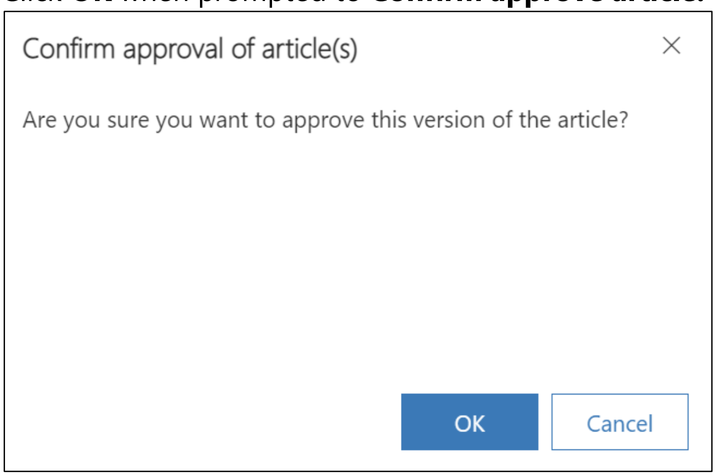
2. Note the **Returns Conditions** knowledge article in **My Active Articles** stream.



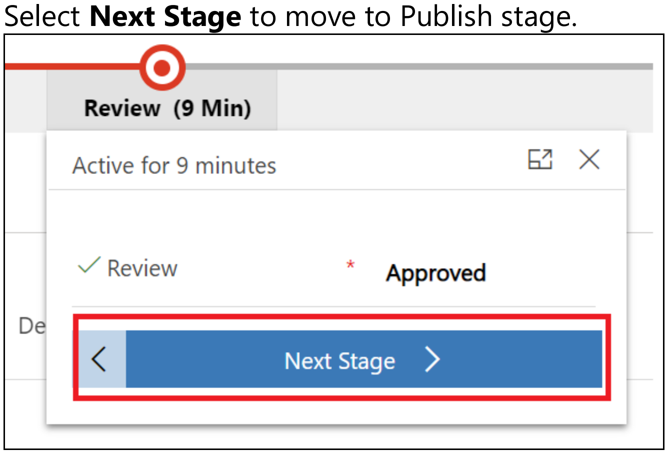
3. Select the **Returns Conditions** knowledge article.
4. On the Business process bar, in the **Review** stage and in the **Review** drop-down, select **Approve**.



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



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



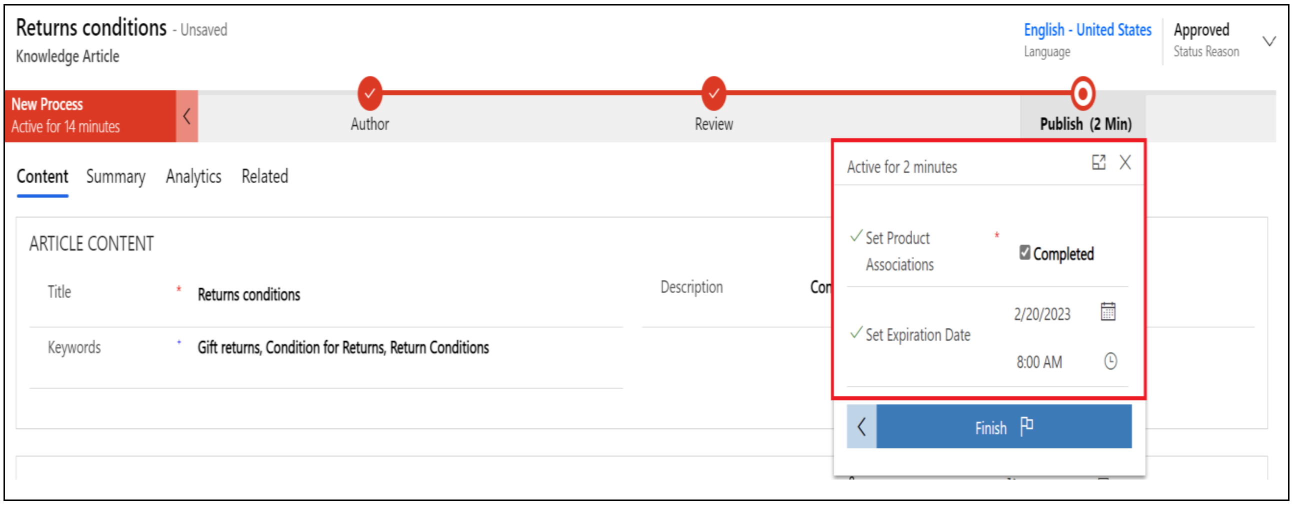
7. You should now be in the **Publish** stage and **Status Reason** should have changed to **Approved.**

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

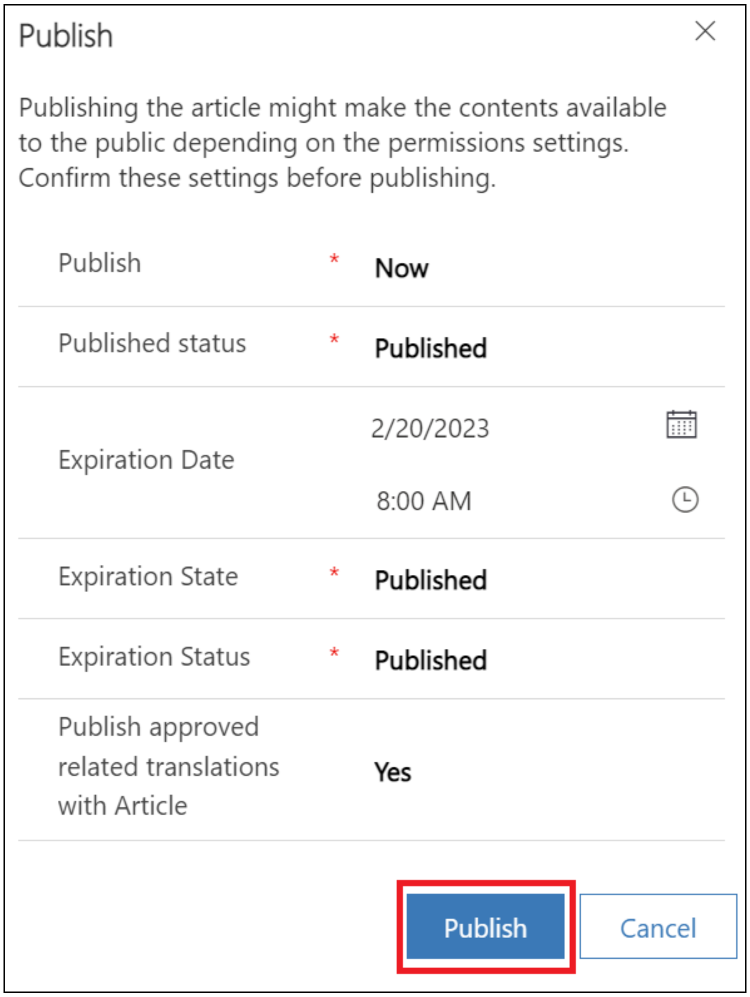
In this task, you will learn how to publish the knowledge article so it's live and ready to be used.

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**



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.