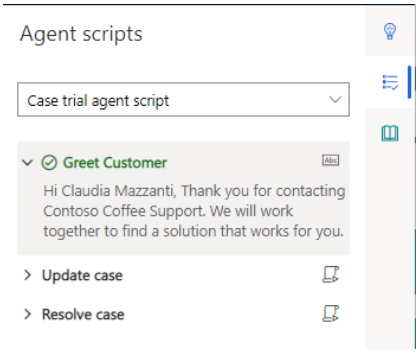
Task 1.5: Using agent scripts and macros

Agent scripts reduce the human errors involved in the resolution process. They let agents know which actions they need to perform next while they interact with a customer, which enables them to adhere closely to business processes. Agent scripts enable agents to provide quick, consistent resolutions, which lower average handling time and improve customer satisfaction. Agent scripts can have text-based guidance and macros, which automate repetitive tasks with a single click.

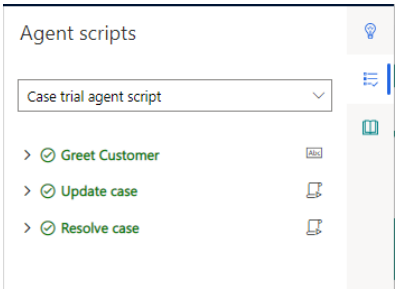
1. From the **Home** session, go to the Customer Service Agent Dashboard.
2. From the dashboard, open any case that is assigned to you.
3. The case will be opened in a session. Click the icon in the productivity pane.
4. Click **Greet Customer** text-based guidance step.
5. Click **Mark as done** after reviewing the guidance.



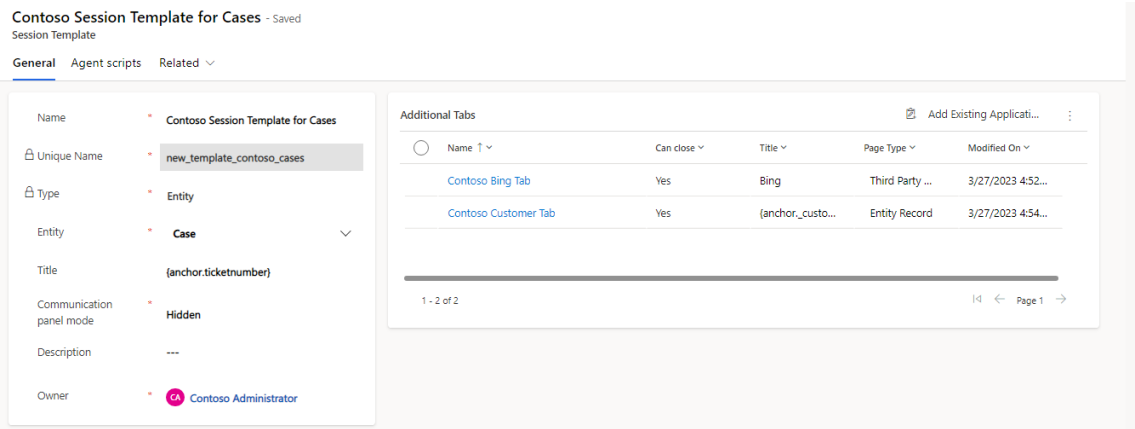
6. Click the **Run** button next to the **Update case** macro to trigger the automation.
   This macro will update the case description and refresh the form to display the changes.

   Note: Each macro can have additional details to help agents. However, the **Run** button can be clicked directly to trigger the macro automation.

7. Click **Run** button next to **Resolve case** macro to trigger the automation.
   This macro will populate the case resolution details, resolve the case, and then refresh the form to display the changes.



Note: You will learn how to create macros in the next module.



6. Click **Save and Close**.

Task 2.5: Creating Macros

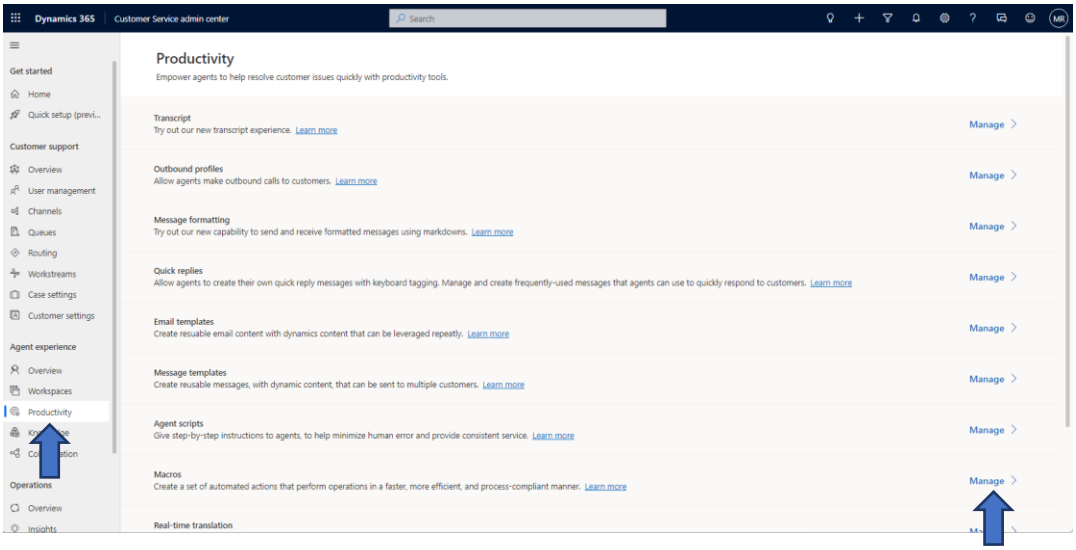
In this task, you will be creating three macros and configuring them in an agent script. Later, you will configure the agent script as part of the session template for cases. Brief description of the macros in this scenario:

Send initial response: this macro will open an email form, apply a specific email template, and update the recipients. You will learn how to update lookup fields via macro using JSON format.

Clone case: this macro will create a clone of the current case. This macro saves the record which refreshes the page, but the macro will refresh again. It's redundant but the intent is for you to learn how to refresh tabs via macro.

Collaboration task: this macro will create a task from a new form and update its values dynamically. You will learn how to use oData query to retrieve information from record related to the case. Example: customer email address.

1. In the Site map, go to **Productivity** under **Agent experience**. Then click **Manage** under **Macros.**



2. Click **New** to create the first macro.

   Name: Send Initial Response
   Description: Send email to customer informing case acknowledgement.

3. In the Macro designer, select **Productivity automation**, and then **Start Macro execution**.
4. Click **Next Step**, then select **Open an email form with predefined template** under **Action**.
5. Provide the following parameters:

   Email recipients: admin@contoso.com
   Entity record ID: ${anchor.incidentid}
   Entity logical name: incident
   Template ID: d0b742b5-e945-4073-981c-11c0beb4e2b1

Note: The recipients will be updated in another macro step. The template ID corresponds to the New Case Acknowledgement email template.

6. Click **New Step**.
7. Select **Autofill form fields** under **Action**.
8. Provide the following parameters:

   Entity logical name: email

9. Click **Show advanced options**, and then click **Add new item**.
10. Provide the following parameters:

    Attribute Name – 1: to
    Attribute Value – 1:
    [{"id":"${anchor._customerid_value}","type":"${anchor._customerid_value@Microsoft.Dynamics.CRM.lookuplogicalname}","name":"${anchor._customerid_value@OData.Community.Display.V1.FormattedValue}"}]

    Attribute Name –2: regardingobjectid
    Attribute Value – 2: [{"id": "${anchor.incidentid}","name": "${anchor.title}","entitytype": "incident"}]

11. Click **New Step**, and then select **Save the record** under **Action**.
12. Click **Save and Close**.

13. Click **New** to create the second macro, and provide the following information:

    Name: Clone case
    Description: Creates a copy of this case.
14. In the Macro designer, select **Productivity automation**, and then **Start Macro execution**.
15. Click **Next Step**.
16. Select **Clone input record** under **Action**.
17. Provide the following parameters:

Entity record ID: ${anchor.incidentid}
Entity logical name: incident
Record title: ${anchor.title}

18. Click **New Step**
19. Select **Autofill form fields** under **Action**.
20. Provide the following parameters:

    Entity logical name: incident

21. Click **Show advanced options**.
22. Provide the following parameters:

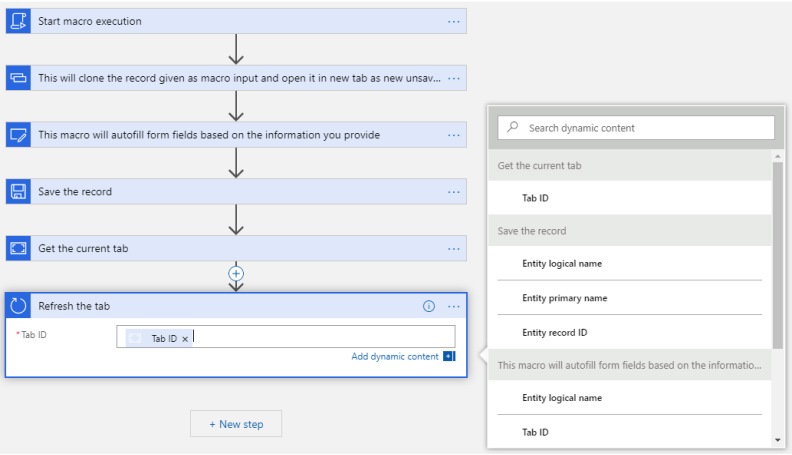
    Attribute Name – 1: ticketnumber
    Attribute Value – 1:

Note: Leave Attribute value – 1 in blank. This will avoid copying the ticket number from the original case to the cloned case.

23. Click **New Step**, and then select **Save the record** under **Action**.
24. Click **New Step**, and then select **Get the current tab** under **Action**.
25. Click **New Step**, and then select **Refresh the tab** under **Action**.
26. Provide the following parameters:

    Tab ID: Tab Id

You will need to select the Tab ID from the dynamics content list:



27. Click **Save and Close**.

Note: You don't need to refresh the tab after a save. The save event will trigger the refresh but the purpose of this exercise is to describe how to dynamically pass the tab id to refresh the page.

28. Click **New** to create the third macro, and provide the following information:

Name: Collaboration task
Description: Creates a task for collaboration purposes.

29. In the Macro designer, select **Productivity automation**, and then **Start Macro execution**.
30. Click **Next Step**, then select **Open an form to create a record** under **Action**.
31. Provide the following parameters:

    Entity logical name: task

32. Click **Show advanced options**, and then click **Add new item**.
33. Provide the following parameters:

    Attribute Name – 1: subject
    Attribute Value – 1: Collaboration task for ${anchor.ticketnumber}

    Attribute Name – 2: regardingobjectid
    Attribute Value – 2: [{"id": "${anchor.incidentid}","name": "${anchor.title}","entitytype": "incident"}]

    Attribute Name – 3: description
    Attribute Value – 3: Customer email: {$odata.contact.emailaddress1.?$filter=contactid eq '${anchor._customerid_value}'}

    Attribute Name – 4: prioritycode
    Attribute Value – 4: 2

Note: This macro will work if the customer is a contact. If the customer is an account, the oData query will fail.

34. Click **New Step**, and then select **Save the record** under **Action**.
35. Click **Save and Close**.

Task 2.6: Creating Agent Scripts

In this task, you will be creating the Agent script and four agent script steps: the first agent script step is a text guidance. The remaining steps are pointing to the macros previously created.

1. In the Site map, go to **Productivity** under **Agent experience**. Then click **Manage** under **Agent scripts.**
2. Click **New** and provide the following information:

   Name: Contoso Support
   Unique Name: new_agentscript_support

3. Click **Save**.
4. Click **+ New Agents script step**.
5. Provide the following information:

Name: Send Initial Response
Unique Name: new_agentscriptstep_greetings
Order: 1
Action Type: Text
Text instructions: Thanks for contacting Contoso support, how can I help you today?

6. Click **Save**
7. Click **+ New Agents script step**.
8. Provide the following information:

Name: Send Initial Response
Unique Name: new_agentscriptstep_initialresponse
Order: 2
Action Type: Macro
Description: Send email to customer informing case acknowledgement.
Target macro: Send Initial Response

9. Click **Save and Close**.
10. Click **+ New Agents script step**.
11. Provide the following information:

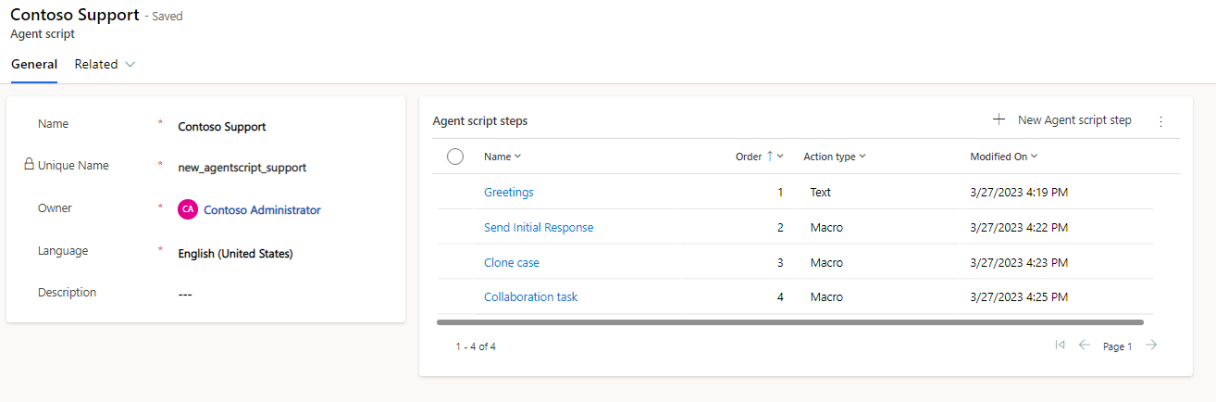
Name: Clone case
Unique Name: new_agentscriptstep_clonecase
Order: 3
Action Type: Macro
Description: Creates a copy of this case.
Target macro: Clone case

12. Click **Save and Close**.

13. Click **+ New Agents script step**.
14. Provide the following information:

Name: Collaboration task
Unique Name: new_agentscriptstep_collaboration
Order: 4
Action Type: Macro
Description: Creates a task for collaboration purposes.
Target macro: Collaboration task

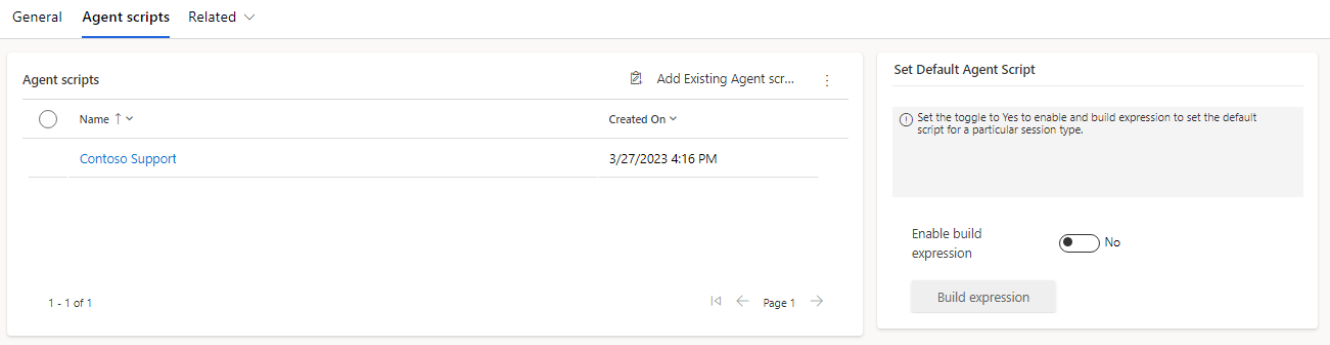
15. Click **Save and Close**.



Task 2.7: Associating Agent Scripts and Session Templates

In this task, you will be associating both app tab templates with the session template previously created.

1. In the Site map, go to **Productivity** under **Agent experience**. Then click **Manage** under **Session Templates.**
2. Open **Contoso Session Template for Cases**.
3. Click **Agent scripts** tab.
4. Click **Add Existing Agent scripts**.
5. Select **Contoso Support** and then click **Add**.
6. Click **Save and Close**.

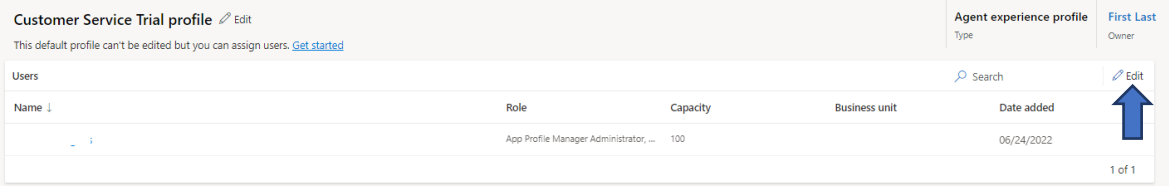


Note: Set Default Agent Script allows admins to determine the default agent script displayed to the agent based on a condition. For example, when agent opens a case that has the priority set to High, then a specific agent script will be set as the default, else, another agent script will be the default. For more information, see [Set the default agent script for agents]

Task 2.8: Administering agent experience profiles

A user can only be assigned to one app profile. The user in the trial environment was previously assigned to an app profile named **Customer Service Trial profile.** For this reason, it is required to remove the user from the **Customer Service Trial profile** app profile before assigning to the **Contoso Agent Profile.**

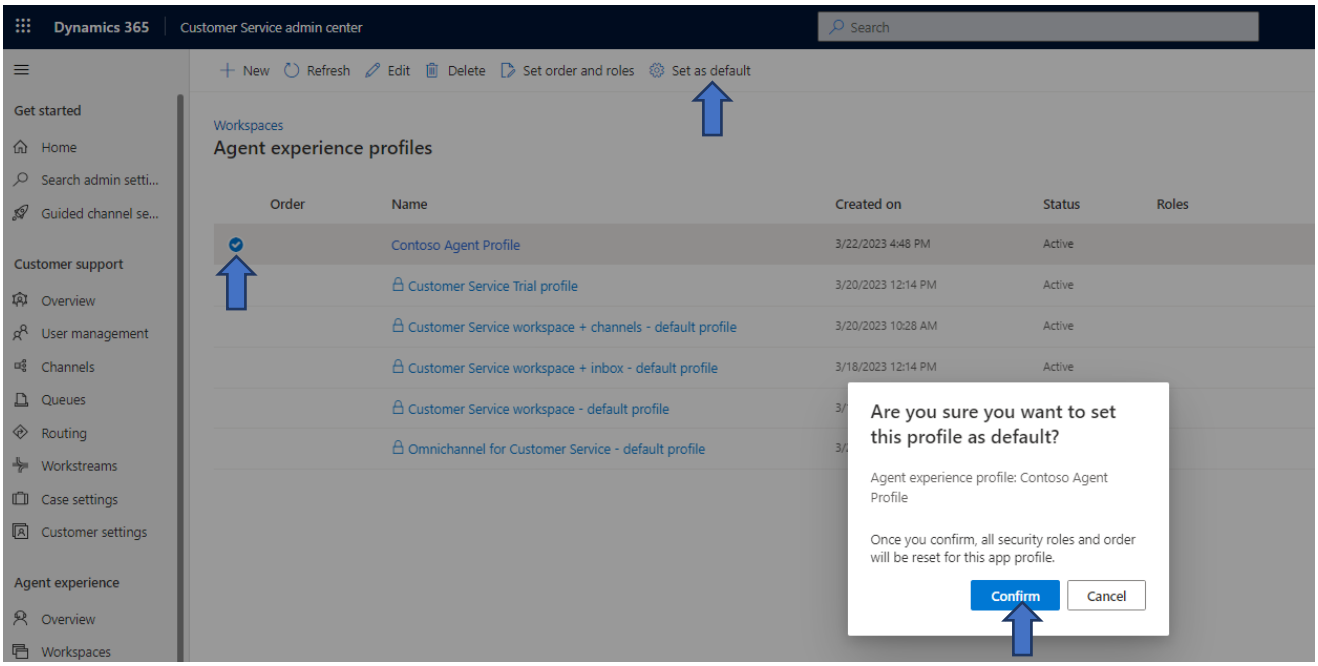
1. In the Site map, go to **Productivity** under **Agent experience**. Then click **Manage** under **Agent experience profiles.**
2. Click to open **Customer Service Trial profile**.
3. Click **Edit** under **Users** section.



4. Select the users from the list and then click **Remove users** and then click **Cancel** to close.

Now, you will be setting the **Contoso Agent Profile** as a default profile to all users without a profile assigned.

1. In the Site map, go to **Productivity**, then click **Manage** under **Agent experience profiles.**
2. Select **Contoso Agent Profile**, click **Set as default**, and then click **Confirm.**



Note: Review the appendix section to learn more about setting custom profiles as default and associating profiles with security roles.

Task 2.8: Testing the agent experience profile

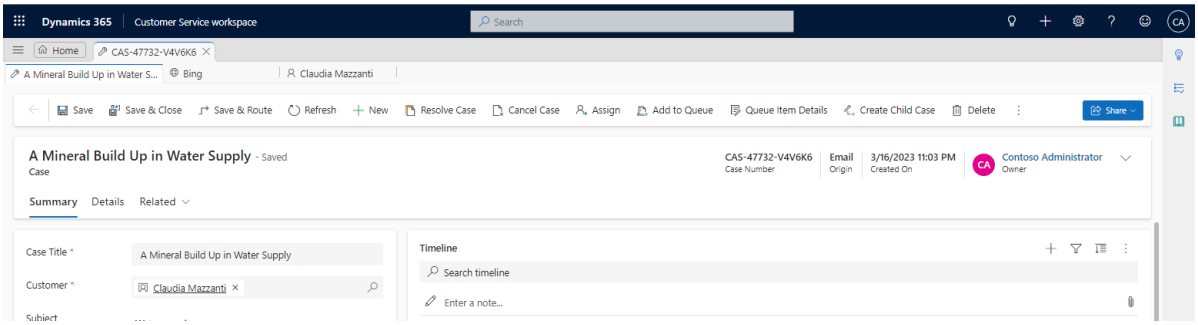
For this task, you will be reviewing the overall process and then logging in the Customer Service workspace app to review the changes in the application. In summary:

- A new app profile was created.
- A session template was created.
- Two app tab templates were created and associated with the session template.
- One agent script with four steps. Three macros available. The agent script associated with the session template.
- The session template was associated with the app profile.
- Profile set as default for all users.

Now it's time to test the application:

1. Sign in to Customer Service workspace, and then open the **Customer Service Agent Dashboard**.
2. From the dashboard, open any of the cases assigned to you. You will notice the following:

   Session label displays the ticket number based on the session template configuration.
   Customer and Bing tabs were opened automatically based on the app tab templates.
   Productivity Pane is collapsed and only showing Smart Assist, Agent Scripts, and Knowledge Search.



3. Click the  icon in the productivity pane.
4. Expand **Greetings** step to review the text guidance and then click  to mark as done.
5. Click Run  from the **Send Initial Response** macro. A new tab will be opened with the email template.
6. Click Run  from the **Clone case** macro. A new tab will be opened with a new case being created.
7. Click Run  from the **Collaboration task** macro. A new tab will be opened with a new task.
8. Click the Customer tab. It will show the customer of the case.
9. Click Bing tab. It will show bing.com website with a search based on the case title