

Workshop - Dynamics 365 Customer Engagement – Omnichannel for Customer Service

Duration: 2 Day – Remote

Focus Area: Business/IT Alignment

Difficulty: 300

Intended Audience

The following roles will find this community workshop useful. Others may also attend, as described in the secondary Audience section.

Primary Audience: Customers looking to learn more on the capabilities of Dynamics 365 Omnichannel for Customer Service

Secondary Audience: Developers and System Customizers looking to extend capabilities of Dynamics 365 Omnichannel for Customer Service

Overview

This is a one-day instructor-led training course that focuses on providing a foundational understanding of the capabilities of Dynamics 365 Omnichannel for Customer Service

Objectives

After completing this training, students will be able to:

- Understand the core features of Omnichannel for Customer Service
- Learn to administer Omnichannel for Customer Service using the Omnichannel Administration app
- Learn to Define Work Streams, deploy Channels and configure routing
- Understand Macros, Agent Scripts and other Productivity Tools

- Learn to use Power Virtual Agents with Omnichannel for Customer Service

Key takeaways

Course Material

- Overview and Administration for Omnichannel for Customer Service
- Work Streams, Channels Routing concepts
- Understanding Productivity Tools
- Power Virtual Agents

Hands-on Labs

- Most of the concepts covered above will be supported by hands-on labs and demos.

Agenda

Day 1

- Introduction to Omnichannel for Customer Service
- Omnichannel for Customer Service Administration
- Omnichannel Routing and Distribution

Day 2

- Overview of Productivity Tools
- Power Virtual Agents with Omnichannel for Customer Service

Course details

Module 1: Introduction to Omnichannel for Customer Service

- Omnichannel for Customer Service Overview
- Omnichannel vs Multi Channel
- Benefits of Omnichannel for Customer Service
- Overview of Omnichannel features
- Understanding the differences between various Customer Service Apps

Module 2: Omnichannel for Customer Service Administration

- Provisioning Omnichannel for Customer Service
- Routing and Distribution Overview
- Configuring Omnichannel
- Defining Users & Queues
- Skills Based Routing

Module 3: Omnichannel Routing and Distribution

- Creating & Defining Work Streams
- Deploying a Chat Channel
- Deploying an SMS Channel
- Deploying a Facebook Channel
- Configuring Entity routing

Module 4: Overview of Productivity Tools

- Macros
- Agent Scripts
- Smart Assist

Module 5: Power Virtual Agents

- Overview of Power Virtual Agents (PVA)
- Omnichannel and PVA - Better Together
- Building Bots, Creating Topics
- Entities
- Leveraging Power Automate
- Configuring and triggering handoff to Live Agents

Pre-requisites

This course is designed for customers looking to learn more on the capabilities of Dynamics 365 Omnichannel for Customer Service. Experience with Dynamics 365 Customer Service is required.

In addition, we recommend the following experience for developer audience:

- Understanding of Dataverse tables, Security and relationships
- Development Experience: C# .Net, Javascript, XML, JSON

For more information

Contact your Microsoft Account Representative for further details.