

Dynamics 365 Customer Service - Customization, Development and Consulting Practice



Cognitive Convergence is Subject Matter Expert in Office 365, Dynamics 365, SharePoint, Project Server, Power Platform: Power Apps-Power BI-Power Automate-Power Virtual Agents.

Our Microsoft Dynamics 365 Customer Service Consulting, Development, Customization, Integration services and solutions, can help companies maximize business performance, overcoming market challenges, achieving profitability and providing best customer service.

Contents

1.	Dynamics 365 Customer Service	4
2.	Availability of Customer Service Hub	7
3.	Move from Dynamics 365 Customer Service Enterprise to Dynamics 365 Customer Service Professional.....	8
1.1	Purchase a Customer Service Professional subscription	9
1.2	Assign and remove licenses	9
4.	Upgrade Omnichannel for Customer Service	10
5.	Unified Routing	11
5.1	How unified routing helps achieve business efficiency	11
5.2	Routing and assignment rules.....	12
5.3	Work classification rules	12
5.4	Manual classification rules.....	13
5.5	Skill attachment rules.....	13
5.6	Machine learning model-based rules	13
5.7	Route-to-queues rules	13
5.8	How prioritization ruleset works	13
5.9	Assignment rulesets	13
5.10	Enable routing diagnostics	14
5.11	Understand routing stages and diagnostics.....	14
5.12	Routing diagnostics flow	15
5.13	Intake	15
5.14	Classification	15
5.15	Route to queue	15
5.16	Prioritization.....	15
6.	Case Management	16
6.1	Set parent and child case attributes (Customer Service Hub)	17
6.2	Set parent and child case attributes (Customer Service app).....	17
7.	Automatically create or update records in Customer Service Hub	17

7.1	Configure rules for creating or updating records automatically	18
8.	Set up rules to automatically create or update records	19
8.1	Activities and entities supported by record creation and update rules	20
8.2	Capture data from external sources	20
8.3	Activate or deactivate a rule	20
8.4	Rules in solutions	21
8.5	Set Email conditions	21
8.6	Set Social Activity conditions	22
9.	Define service-level agreements.....	22
9.1	Configure SLAs in Customer Service Hub.....	22
9.2	Create SLAs in Customer Service Hub.....	23
9.3	Create an SLA	23
10.	Set up a search provider in Customer Service Hub.....	23
10.1	Post-configuration agent experience.....	24
11.	Chat Channel.....	24
11.1	Disclaimer.....	25
11.2	Configure a chat widget in Omnichannel admin center	25
11.3	Configure a chat widget in Omnichannel Administration.....	26
11.4	Configure customer notifications	27
12.	Conclusion.....	28

1. DYNAMICS 365 CUSTOMER SERVICE

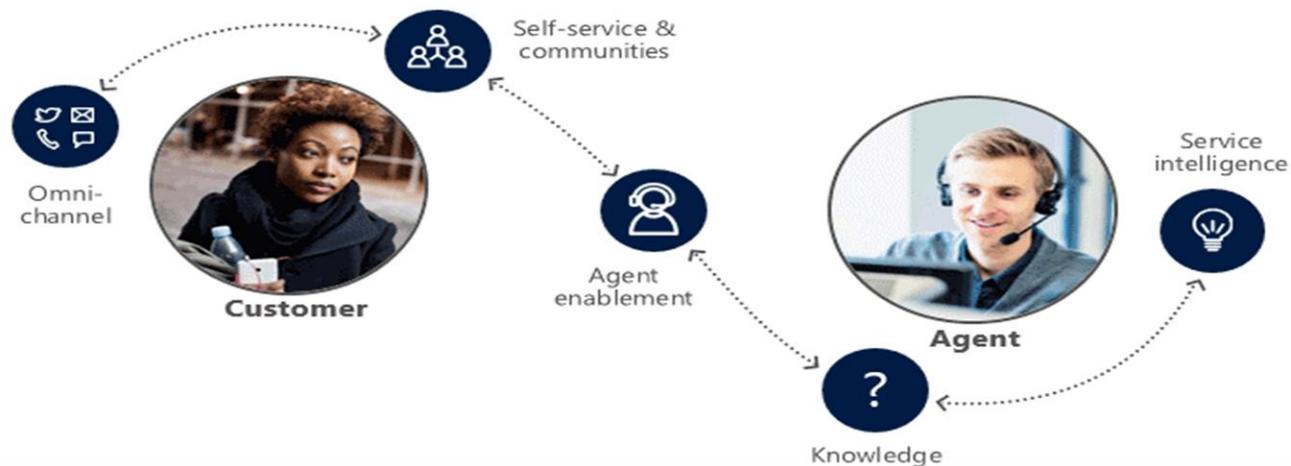
The agent experience is the heart of Dynamics 365 Customer Service. The key to improving satisfaction in service delivery is enabling agents to take customer requests from any channel, handle multiple sessions at a time, interact with multiple apps without losing context, and enhance their workflow with productivity tools.

We offer several app experiences for you to choose from, depending on your support organization's needs.

Use Dynamics 365 Customer Service to:

- Track customer issues through cases
- Record all interactions related to a case
- Share information in the knowledge base
- Create queues and route cases to the right channels
- Create and track service levels through service-level agreements (SLAs)
- Define service terms through entitlements
- Manage performance and productivity through reports and dashboards
- Create and schedule services
- Participate in chats
- Manage conversations across channels

Dynamics 365 for Customer Service



The following capabilities are available in the different app experiences, depending on your needs. Select the app of your choice to read more about the details of the user experience in each app:

Features	Customer Service workspace	Omnichannel for Customer Service	Customer Service Hub	Customer Service Team Member	Customer Service app (Deprecated)
Multisession	✓	✓	+	+	+
Conversations (with Chat or Digital Messaging Offers)	✓	✓	+	+	+
Channels (with Digital Messaging Offer)	✓	✓	+	+	+
Case Management	✓	✓	✓	✓	✓
Knowledge	✓	✓	✓	Read only	✓
Insights	✓	✓	✓	+	+
Service Scheduling	+	Not applicable	✓	+	✓
Connected Service with IoT	+	+	✓	+	+
Extensibility	✓ with Channel Integration Framework version 2.0, custom messaging channel	✓ with Channel Integration Framework version 2.0, custom messaging channel, Mobile SDK	✓ with Channel Integration Framework version 1.0	+	+
Unified Interface compliant	✓	✓	✓	✓	+
Basic Administration	Customer Service Hub -> Service Management	Omnichannel Administration application	Customer Service Hub -> Service Management	+	Settings -> Service Management

Case Routing & Queue Configuration	Customer Service Hub -> Service Management	Omnichannel Administration application	Customer Service Hub -> Service Management	+	Settings -> Service Management
Add & Configure Channels	Omnichannel Administration	Omnichannel Administration	+	+	+
Control User Experience for Agent & Supervisor	In app profile manager	In app profile manager	+	+	+
Licensing: Customer Service Professional	+	+	✓	+	+
Licensing: Customer Service Enterprise	✓	✓	✓	✓	Not applicable
Licensing: Chat	✓	✓	+	+	+
Licensing: Digital Messaging	✓	✓	+	+	+

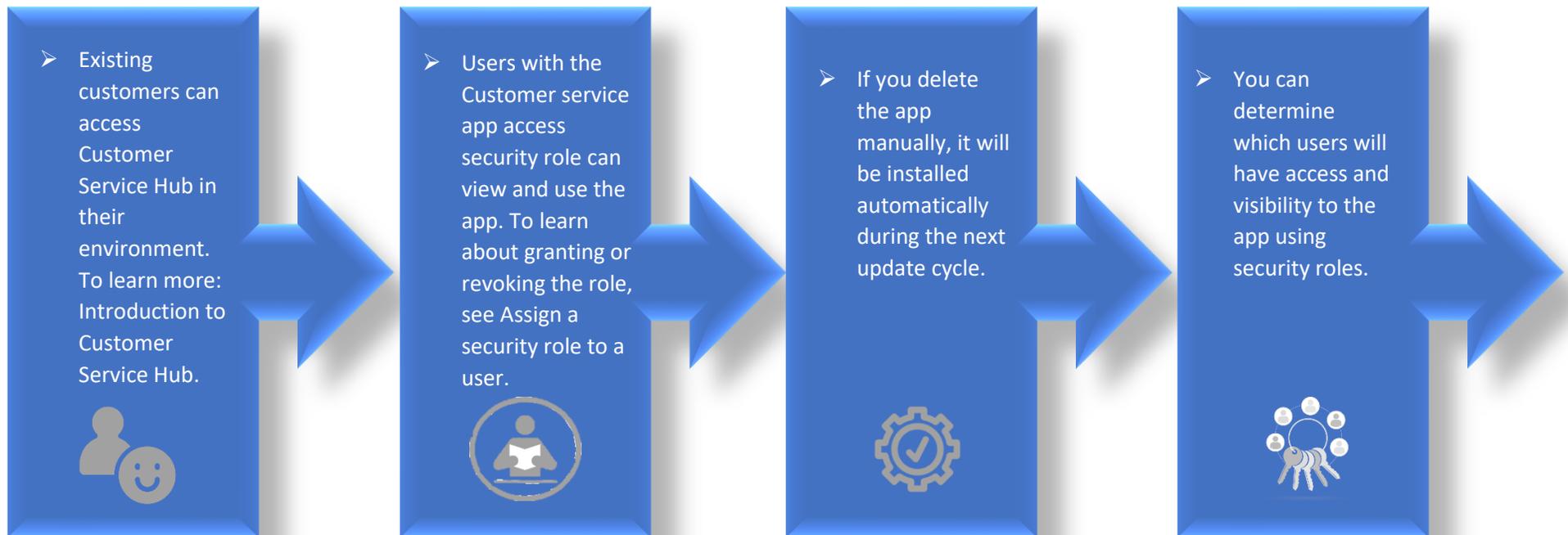


- ❖ Customer service center
- ❖ Connected customer service
- ❖ Queue management
- ❖ Case management
- ❖ Task management
- ❖ Service calendar management
- ❖ Product information management
- ❖ Client management
- ❖ Omnichannel for Customer Service
- ❖ Integration with Dynamics 365 Virtual Agent for Customer Service
- ❖ Knowledge article templates
- ❖ Knowledge management
- ❖ Service scheduling migration tool
- ❖ Service management
- ❖ Multiple Plans option to support different needs

2. AVAILABILITY OF CUSTOMER SERVICE HUB

The Customer Service Hub solution is automatically installed in the environments that have customer engagement apps, such as Customer Service and Sales Hub.

The salient features of the integrated solution are as follows:



3. MOVE FROM DYNAMICS 365 CUSTOMER SERVICE ENTERPRISE TO DYNAMICS 365

CUSTOMER SERVICE PROFESSIONAL

Customer Service Professional is targeted at businesses that have fewer needs and don't require the full capabilities that are offered by Customer Service Enterprise.

To switch from Customer Service Enterprise to Customer Service Professional, do the following steps:

➤ Purchase a Customer Service Professional subscription.

➤ Assign Customer Service Professional licenses to the users and remove the Customer Service Enterprise licenses from the users.

➤ Review the Microsoft Dynamics 365 Licensing Guide.

Cognitive Convergence - Subject
Matter Expert in SAAS, Office 365, Dynamics
365, SharePoint, Project Server, Power
Platform: Power Apps-Power BI-Power
Automate-Power Virtual Agents
<http://www.cognitiveconvergence.com>
+ 1 4242530744
shahzad@cognitiveconvergence.com

1.1

- ✓ Sign in to the Microsoft 365 admin center with the Dynamics 365 account that has admin permissions.
- ✓ In the navigation pane, expand Billing and select Purchase Services, and then select the Dynamics 365 Customer Service Professional tile.
- ✓ Select Buy, and then follow the steps to purchase new licenses.



- ✓ After you've purchased the licenses, assign the licenses to users.
- ✓ In the Microsoft 365 admin center navigation pane, select Users > Active users.
- ✓ Select multiple users, and then select Manage product licenses.

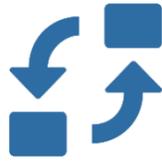


Active users

Recommended actions (1) ▼

[Add a user](#) [Refresh](#) [Delete user](#) [Reset password](#) [Manage product licenses](#) ⋮ 2 selected [Filter](#)

Display name ↑	Username	Licenses	Choose columns
✓ Abraham McCormick	abe@ContosoSuites666.onmicrosoft.com	Power BI (free) , Dynamics 365 Customer Engagement Plan	
✓ Alex Allman	alexallman@ContosoSuites666.onmicrosoft.com	Power Virtual Agents Viral Trial , Microsoft Power Automate	



- Select Replace to unassign existing licenses and assign new ones.



- Select Save changes.



- Select the license for your Dynamics 365 Customer Service Professional plan.



- Review the license status on the Active users' page, and make other assignments as needed

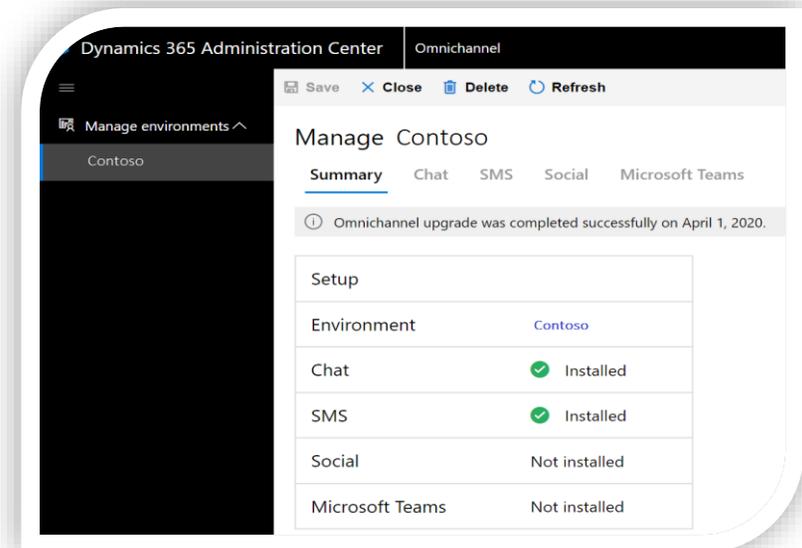
4. UPGRADE OMNICHANNEL FOR CUSTOMER SERVICE

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. An additional license is required to access Omnichannel for Customer service.

Upgrade to the latest version of Omnichannel for Customer Service to unlock the benefits of new features. You can now upgrade to the latest release of Omnichannel for Customer Service from the Omnichannel environments page in Dynamics 365 Admin Center.

Do the following steps to upgrade Omnichannel for Customer Service:

- Log in to the Power Platform admin center.
- Expand Resources, and select Dynamics 365 apps.
- On the Dynamics 365 apps page, scroll to the Omnichannel for Customer Service application, select the ellipses (...), and then select Manage. The Omnichannel environments page opens on a new tab.
- Select your environment under Manage environments in the left pane.
- Select the Upgrade button that is enabled when an upgrade is available.



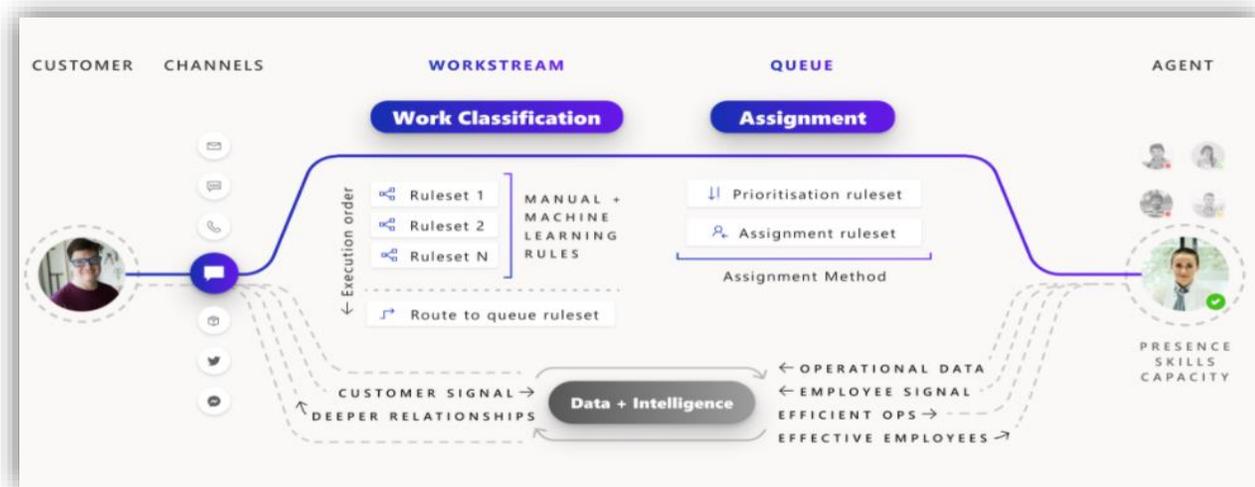
- The system begins the upgrade and displays the message Omnichannel upgrade is currently in progress.
- When the upgrade process is completed successfully, your environment is upgraded to the latest version, and the message Omnichannel for Customer Service upgrade was completed successfully is displayed with the date.

5. UNIFIED ROUTING

Unified routing is an intelligent, scalable, and enterprise-grade routing and assignment capability that can direct the incoming work item to the best-suited queue and agent by adhering to work item requirements and matching them with the agent's capabilities.

The unified routing infrastructure can be used to route service requests on all channels. This creates a unified view of workforce utilization across multiple channels, and thus helps to optimize distribution of work across the workforce. It works in a truly omnichannel way by ensuring that work items on all the channels are routed in a consistent and similar manner. It takes the agent engagement on different channels into account before any new work is assigned to them.

For instance, an organization receiving an incoming chat will add information on the work item—such as skills required, urgency level, category of customer, and importance level—in the classification stage, based on certain conditions that are met as part of the configured rules. In the assignment stage, an organization might want to first prioritize the incoming chats based on highest urgency level and importance, and then assign them to the agents by matching the skills required, current workload status, and availability.



5.1 How unified routing helps achieve business efficiency

Unified routing optimizes businesses in the following ways:

- Connecting end-customers with the best-suited agent to provide the right outcome upon first contact.
- Routing work items to the best queue by using attributes in a related entity, thereby saving an admin from creating a custom workflow.
- Using skills-based routing to automatically assign incoming work, matching to the best agent and decreasing resolution time.

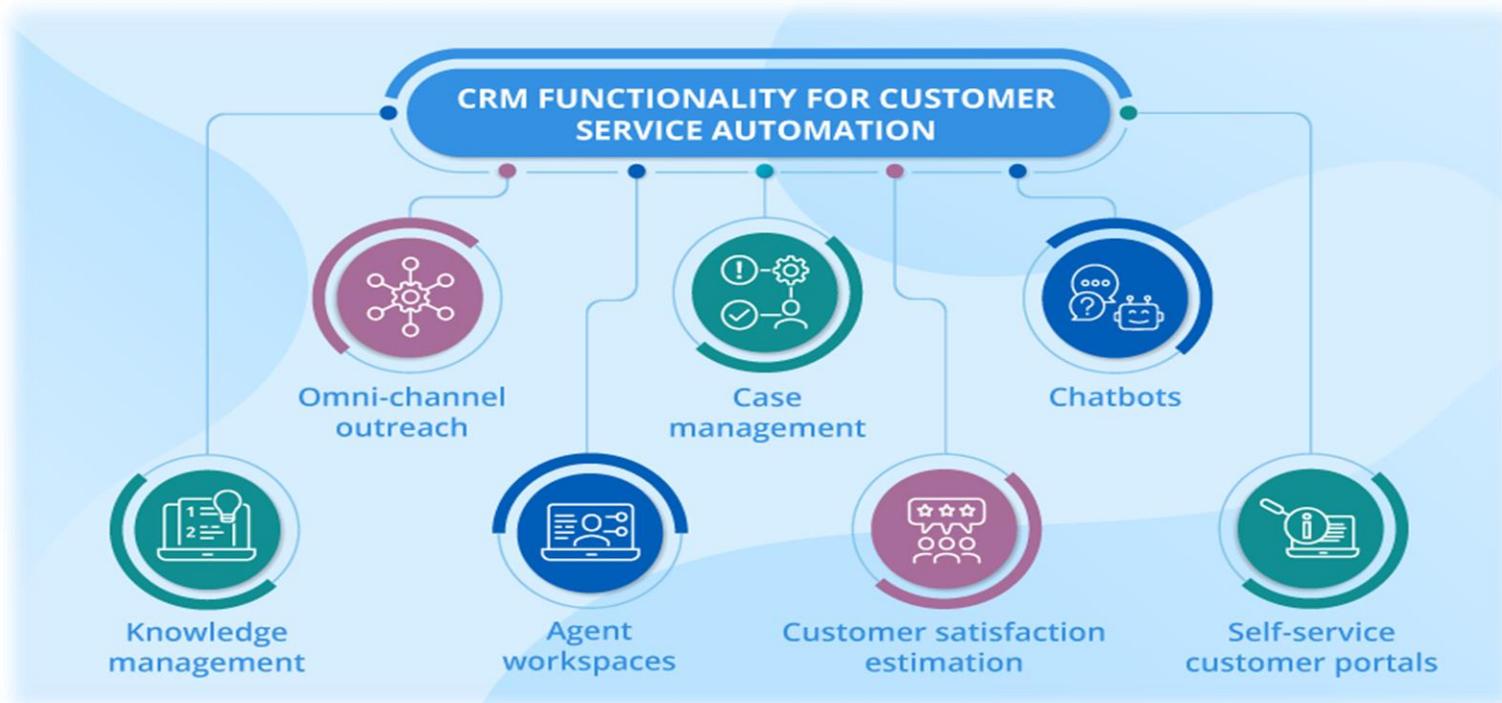
- Adding more context to the incoming work item using conditions on work item attributes and related-entity attributes, and then further using that information to route to a particular queue and also while assigning to the right agent.
- Using machine-learning models to predict skills and assigning incoming work items to the best agent using skills to avoid writing manual declarative skill-identification rules.
- Prioritizing work items within a queue using work item attributes, added context, or related entity attributes so as to ensure the business is able to use the agent's time on the most important work items first as per the business need.
- Assigning work items within a queue by matching agent attributes against work item requirements dynamically, thereby assigning agents as per the business requirement.

5.2 Routing and assignment rules

A workstream is a container for work items to be enriched, routed, and assigned. A workstream is associated with a channel, such as live chat. Routing rules are written as rulesets, which comprise rule items. Routing rules for a workstream are composed of work classification rules and route-to-queue rules.

5.3 Work classification rules

Work classification rules let you update work item attributes. Typically, rules are written in the format of "if defined condition satisfies, then set the output attributes to certain values," but can also be surfaced through machine learning models. They are optional and can be used to add additional information to the incoming work items that are then used for more precise routing and assignment.



Work classification rules can be written by using the manual declarative decision list or by using machine learning models.

5.4 Manual classification rules

Manual classification rules are run to update work item attributes. They are written in the format of "if defined condition satisfies, then set the output attributes to certain values." You can create conditions to define rules based on multiple entity attributes.

5.5 Skill attachment rules

Skill attachment rules are a sub-type of manual work classification rules and are defined to attach skills to the work item. They are written in the format of "if defined condition satisfies, then attach defined skills to the work item."

5.6 Machine learning model-based rules

Machine learning model-based rules are a sub-type of work classification rules, and are rules defined to attach skills to the work item using the AI Builder text classification machine learning model created as part of the intelligent skill finder bootstrapping experience. They are written in the format of "send work item selected attributes to the published model and attach the returned tags from the model as skills on the work item."

5.7 Route-to-queues rules

Queue routing rules are rules to send the work item to the right queue. They are written in the format of, "If defined condition satisfies, then route the work item to the defined queue." They are optional, and if no rules are defined or no rules match, then the incoming work item will be routed to the default queue of the respective channel type. For a workstream, the route-to-queue ruleset is run after all of the work classification rulesets are run. A workstream can have only one route-to-queues ruleset.

5.8 How prioritization ruleset works

A prioritization ruleset is an ordered list of prioritization rules. Every prioritization rule represents a priority bucket in the queue. In a prioritization rule you can specify a set of "conditions" and "order by" attributes. During evaluation, the prioritization rules will be run in the order they are listed. For the first prioritization rule, the work items in the queue that match its conditions will be put in the same "priority bucket". In that bucket, the items will be further sorted by the order specified in the prioritization rule.

5.9 Assignment rulesets

After configuring the prioritization ruleset, you can author the assignment rule set for the queue.

The assignment rule set is an ordered list of assignment rules. Each assignment rule consists of a set of conditions using which agents are selected and an "order by" field using which the agents that match is sorted. During runtime, the assignment rule with the top order is evaluated first. The agents are matched as per the conditions specified in the rule. If more than one matching agent exist, then they are sorted by the

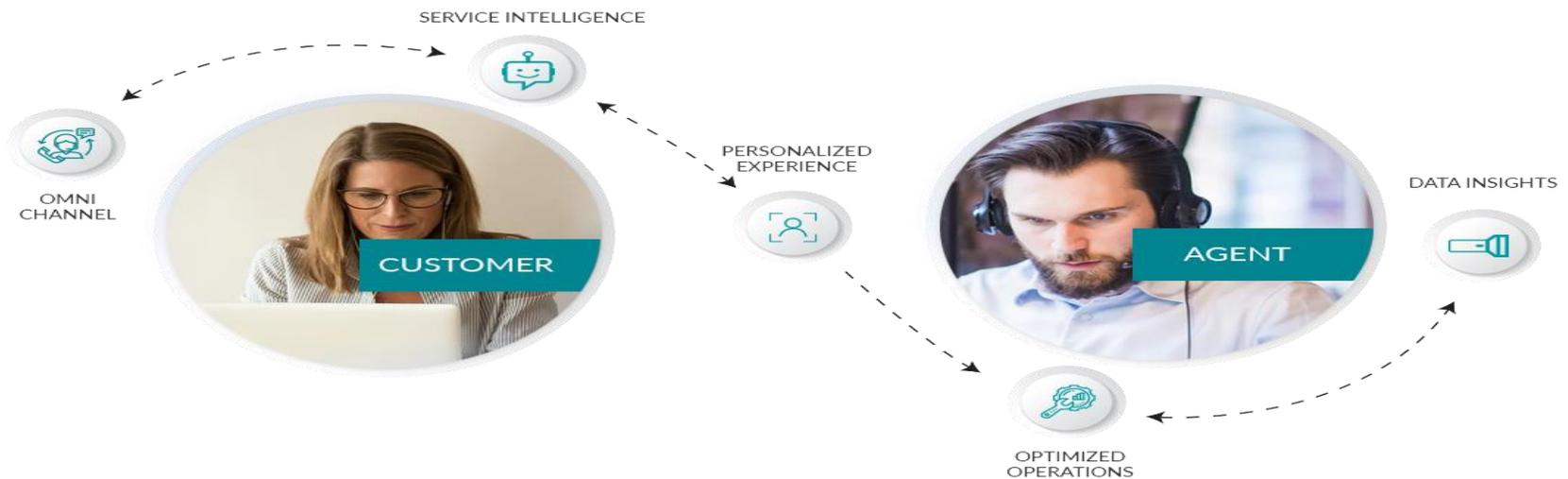


"order by" field, and the top agent is assigned the work. If no agents are matched, then the next assignment rule in the rule set is evaluated, and so on.

5.10 Enable routing diagnostics

To see data related to work items and their status, you need to enable routing diagnostics.

- Sign in to Dynamics 365.
- Perform one of the following steps:
 - In Customer Service Hub, go to the Service Management work area and select Diagnostics.
 - Sign in to Omnichannel admin center and select Diagnostics from the Advanced settings options in the menu.
- On the Routing diagnostics page command bar, select Turn on routing diagnostics.
- In the confirmation message that appears, select Yes.
- You'll see a list of new work items appear on your screen. However, Work items may not appear on your screen immediately.



5.11 Understand routing stages and diagnostics

The Routing diagnostics page displays a list of work items with details and the stage each work item is in. The following table displays the information to help you understand routing diagnostics.

- **Work item:** The name of the work item. Work items can be searched and sorted by clicking the dropdown next to the work item column.
- **Routing status:** The stage the work item is in.
- **Routing started on:** The time and date when the routing began
- **Routing duration:** The amount of time the work item has been in its current stage.
- **Work stream:** The name of the work stream that the work item was assigned to.

- **Queue:** The name of the queue that the work item was routed to.

5.12 Routing diagnostics flow

Each work item needs to pass through a set of stages before its routing stage can be assigned as completed. You can create multiple work streams and assign work items based on their severity and priority. The standard flow of a work item is mentioned here.

Intake → Classification → Route to queue → Prioritization → Assignment selection → Assignment

5.13 Intake

When a work item comes in, it goes to the first work stream in the Intake table and is checked for whether it meets the conditions of the rule set. The work item moves to the second work stream and checks for a match with that rule set, and so on. When a work item matches the rule set, the work item is run. You can create multiple work streams based on priority of the work items. This is called the Intake stage of the workflow.

After a work item passes the Intake stage, it's then classified through several rule sets and rule items.

A work item passes through three stages.

- **Processed:** Work item has passed through a rule set but didn't match with the rule set and is therefore not run.
- **Applied:** Work item has passed through a rule set and matched with the conditions of the rule set.
- **Not processed:** Work item did not pass through a rule set.

5.14 Classification

If a work item doesn't run through a particular rule set in the Classification rulesets list, the Run status check mark is displayed in red. When the work item executes a particular rule set, the Run status check mark is displayed in green. A work item executes all rule sets, but it doesn't execute all rule items within the rule set.

5.15 Route to queue

Queue routing rules are formulated to send the work item to the correct queue.

5.16 Prioritization

The Prioritization rule set is a list of prioritization rules. Work items are routed according to their priority.



6. CASE MANAGEMENT

A case typically represents a situation or incident that's reported by a customer and requires a resolution. Cases are designed to track the process from the initial intake of an incident, through the remediation process, to the final resolution. Dynamics 365 Customer Service has several components that work together to provide an end-to-end case management solution that not only helps identify cases but also routes each case to the most appropriate agent who can provide guidance and resolve the case. Here are some of the most commonly used components:

- **Cases:** A case represents a single incident of service. In other words, it represents anything, in the context of a customer interaction, that requires some type of resolution or answer. Multiple cases can be associated with a single customer at any time.
- **Activities:** An activity typically represents an interaction with a customer, like a phone call. Multiple activities can be associated with a single case.
- **Entitlements:** Entitlements specify the amount of support services that a customer is entitled to. Think of them as support contracts.
- **Knowledge articles:** The knowledge base is a repository of informational articles that help customer service representatives resolve cases.
- **Queues:** A queue is a place to organize and store activities and cases that are waiting to be processed.
- **Service-level agreements (SLAs):** SLAs are a way to track and define what should happen when a case is opened, like how long it should take to respond to a customer.
- **Record creation and update rules:** Record creation and update rules can be applied to different activity types to automatically create Dynamics 365 records.
- **Routing rules:** Routing rules are applied to cases to automatically route them to a specific queue or user.
- **Business process flows:** A business process flow represents a guided process that has different stages and steps that are used to resolve a specific item, like a case.

Share a 360-degree relationship view and real-time guidance, to improve resolution time and earn client trust.

Cognitive Convergence

<http://www.cognitiveconvergence.com>

+1 4242530744

shahzad@cognitiveconvergence.com

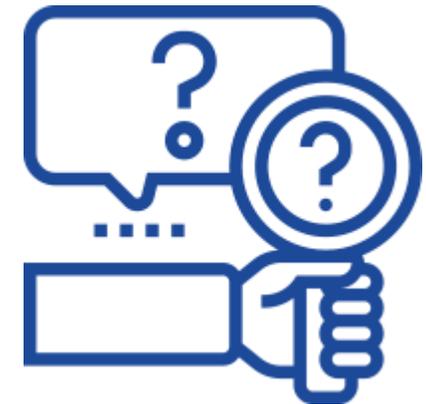
6.1 Set parent and child case attributes (Customer Service Hub)

- Make sure that you have the Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions.
- In the Customer Service Hub sitemap, go to Service Management and select Case Settings > Parent Child Case Settings.
- In the Case Settings dialog box, select the attributes that the child case will inherit from the parent case.
- You can view Available and Selected attributes in the form of two lists. Using the arrows >, <, >>, and <<, you can move the attributes from one list to another.
- You can also select a case closure setting that defines how parent and child cases are closed. Select one of the case closure preference for parent and child cases:
 - Close all child cases when parent case is closed: As soon as the parent case is closed, all the child cases are also closed.
 - Don't allow parent case closure until all child cases are closed: The parent case can't be closed until all the child cases are closed.
- When you're done, select OK.



6.2 Set parent and child case attributes (Customer Service app)

- Make sure that you have the Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions.
- On the nav bar, choose Microsoft Dynamics 365 > Settings.
- Choose Settings > Service Management.
- Select Parent and Child case settings.
- In the Case Settings dialog box, select the attributes that the child case will be inherit from the parent case.
- Using the Parent and Child case settings, specify the information that will be inherited from a parent case to the child case. You can also select a case closure setting that defines how parent and child cases are closed. Select one of the case closure preference for parent and child cases:
 - Close all child cases when parent case is closed: The parent case can't be closed until all the child cases are closed.
- When you're done, select OK.



7. AUTOMATICALLY CREATE OR UPDATE RECORDS IN CUSTOMER SERVICE HUB

In Dynamics 365 Customer Service Hub, you can automatically create or update system or custom records from incoming activities, such as emails, social activities, and custom activities. In this section, you'll learn about creating rules for automatically creating records for cases from incoming emails.

7.1 Set up rules for creating or updating records automatically

Every organization has multiple applications to capture customer interactions. The ability to channel external data into Microsoft Dataverse records can significantly improve the efficiency of your sales, marketing, and service teams, and increase the quality of your data. You can now direct this data from various applications and external sources into Dataverse with the help of record creation and update rules.

7.2 Activities and entities supported by rules for creating or updating records automatically

By default, Dynamics 365 Customer Service supports creating records from the following activities:

- Email
- Social activity
- Task
- Phone call
- Appointment
- Service activity
- Custom activity

7.3 Prerequisites

- Make sure that the following prerequisites are met:
 - Permission or role to create rules
 - Information on the queues for which you want to create the rules

7.1 Configure rules for creating or updating records automatically

You can configure a rule that when active will be run for incoming emails. Using the feature to create rules, you can define the conditions for when a rule can be run.

- In Customer Service Hub site map, go to Service Management, and select Automatic record creation and update rules. The Record creation and update rules page appears.
- Select New. The New Record Creation and Update Rule page is displayed.
- On the Basic tab, in Step one details, enter the following details:
 - Rule name: Enter a name for the rule.
 - Queue to monitor: Select a queue on which the rule will be activated. For email activity, you must select a queue to be able to activate the rule.
 - Activity type to monitor: Select Email in the list.
- Select Save. The Step two: conditions to evaluate and actions to take area is enabled.
- In Step two: conditions to evaluate and actions to take, select New. The Condition builder page is displayed.
- Perform the following steps:
 - In Condition > Condition name, enter an intuitive name.
 - In Condition that must pass to continue (pass if blank), select Add. c. Use the following options to define the criteria for the rule to be evaluated:
 - Add row

Service Scheduling - helps organizations to track service scheduling, manage different service types and the resources to complete the job.

-  Service Calendar
-  Service Scheduler

- Add group
 - Add related entity
- In Actions to take > Record to create, make sure the value is Case. A case will be created if the conditions specified are met for the email activity.
- In Configure in Microsoft Power Automate, select Save and open in Power Automate. The Power Automate application opens in a new tab where you can configure criteria that must be evaluated for the email activity.
- Select Save & Close. The condition builder is closed.
- In Step three: additional actions to take after matching with a condition, select an option based on your requirement for Automatically reply to email.
- If you select Yes, select an email template in the Select email template list box.

Email to case

Record Creation and Update Rule

4/2/2020 9:37 PM
Created on

Draft
Status ▼

Basic

Advanced

Related

Step one: details

Rule name * **Email to case**

Queue to monitor <account manager>

Activity type to monitor * **Email**

Step two: conditions to evaluate and actions to take

+ New ⋮

✓ Name

8. SET UP RULES TO AUTOMATICALLY CREATE OR UPDATE RECORDS

Every organization has multiple applications to capture customer interactions. The ability to channel external data into Microsoft Dataverse records can significantly improve the efficiency of your sales, marketing, and service teams, and increase the quality of your data. You can now direct this data from various applications and external sources into Dataverse with the help of record creation and update rules.

By using record creation and update rules in Dynamics 365 Customer Service, you can automatically create or update system or custom records from incoming activities, such as emails, social activities, or custom activities, without writing any code. Not just that, you can set up the rule to convert the incoming activity into multiple records. For example, you can create a case and a lead from a single social activity.

A record creation and update rule consists of rule items that define the conditions for creating or updating records, and also defines what actions or steps to take on the newly-created records. The rule also contains channel properties that are used to define conditions for rules, and also for setting properties of the record you're creating or updating.

8.1 Activities and entities supported by record creation and update rules

By default, Dynamics 365 Customer Service supports creating records from the following activities, also called source types in the context of record creation and update rules:

- Email
- Social activity
- Task
- Phone call
- Appointment
- Service activity
- Custom activity

These activities can be converted to any default (system) entity records or custom entity records. For example, you could create a lead, opportunity (system record), or incident (custom record) from an incoming email.

8.2 Capture data from external sources

You can also capture additional valuable customer information provided by an external application in the form of JSON (a collection of name-value pairs) and use it to enhance the quality of the target records and set various conditions in the record creation and update rules.

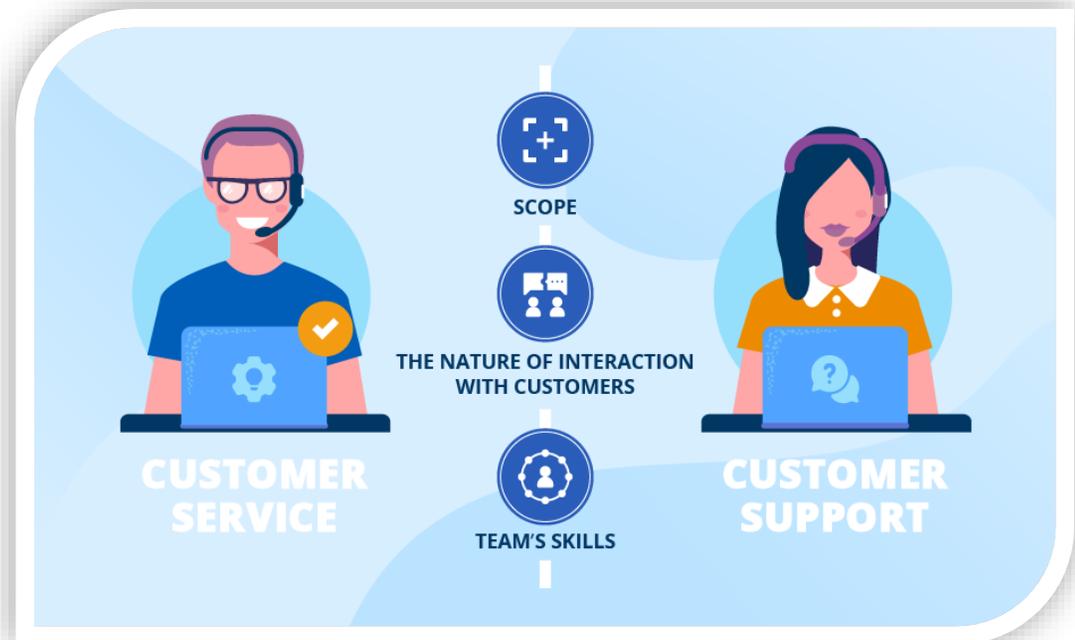
Every default (out-of-the-box) activity or custom activity has an Additional Parameters attribute. This attribute stores the JSON payload received from an external application.

To capture this information in Dataverse, you can define channel properties and associate them with a particular rule or share them across multiple rules of the same source type. For example, along with a social post, you can capture important information about the post, such as sentiment value.

8.3 Activate or deactivate a rule

For any record creation and update rule to apply to a matching incoming activity, after you add the rule items, you must activate the rule.

When a record creation and update rule is activated, a corresponding workflow is created automatically. You can use channel properties to define a workflow's conditions and operators in mapping the target entity attribute values. For complex scenarios, you may configure child workflows.



8.4 Rules in solutions

The record creation and update rules can be packaged as a part of Dataverse solution. Customizers and developers distribute solutions so organizations can use Dataverse to install and uninstall the business functionality defined by the solution.

Keep the following things in mind about using rules in solutions:

- Any rule that you created in Dynamics CRM Online 2015 Update 1 or later can't be exported to a previous release.
- Any rules upgraded to and edited in Dynamics CRM Online 2015 Update 1 or later can't be exported back to an earlier release.

8.5 Set Email conditions

If the source type for the rule is set to Email, specify the conditions for converting the email to the target record.

- Create records for email from unknown senders. If you select this check box, all email messages from unknown senders (a sender whose email address isn't present in any records) are converted to new records (based on the conditions you define). A contact record is also created for this unknown sender.
- Create case if a valid entitlement exists for the customer. If you select this check box, a case is created only if an active entitlement exists for the customer.
- If the sender of the email is a contact with a parent account, a record is created if the contact's parent account has a valid entitlement, and the contact is listed in the Contacts section of the entitlement or if the Contacts section is empty (which means the entitlement is applicable to all contacts for the customer).
- Create cases for activities associated with a resolved case. If you select this check box, a case is created if the email is related to a resolved case. If the email is related to an active case, a new case won't be created. However, if the email is related to a canceled case, a new case will be created.
- Create case when the case associated with the activity is resolved since. If you select the Create cases for activities associated with a resolved case check box, select the duration here. A case is created only if the case is resolved earlier than the duration you specify. If the incoming email is related to a case resolved later than the specified duration, the incoming email is associated with the existing resolved case; a new case won't be created.
- Send automatic email response to customer on record creation. Select this check box if you want to automatically send email responses to the sender of the email after a target record for the email is created.
- Select email template to respond to customer. If you select the Send automatic email response to customer on record creation check box, select an email template (global email template or email template of any entity type). If you don't select a template, an automatic response won't be sent.



8.6 Set Social Activity conditions

If the source type for the rule is set to Social Activity, specify the conditions for converting the social activity to the target record.

- Create records for blocked social profile. If you select this check box, a target record is created or updated for the social posts (social activities) from social profiles that are blocked by you.
- Create records for direct messages only. If you select this check box, the target record is created only when the social posts are sent as direct or private messages. If you clear the check box, records are created for all social posts including public messages (timeline).

9. DEFINE SERVICE-LEVEL AGREEMENTS

Service-level agreements (SLAs) enable businesses to track support policies and ensure customers are being supported per the support policy to which they are entitled. Businesses use SLAs to govern support products that customers either receive as part of their purchase or add on to their purchase. SLAs include policy details such as how quickly a customer is entitled to receive support, how many support requests a customer can make, and how long after purchases a customer can be supported as part of the agreement.

Define the level of service or support that your organization agrees to offer to a customer by using service-level agreements (SLAs) in Dynamics 365 Customer Service. You can include detailed items to define metrics or key performance indicators (KPIs) to attain that service level. KPIs help you get timely warnings about any issues your customer support team might be having.



9.1 Configure SLAs in Customer Service Hub

With the SLA feature in Customer Service Hub, you can:

- Use out-of-the-box actions in Microsoft Power Automate.

- Define work hours and pause and resume SLAs at the SLA KPI level and SLA item level, which help track SLA items for different work hours based on priority and criteria. The pause settings at SLA KPI level or SLA item level gives you added flexibility to define pause conditions at a more granular level.
- In a case lifecycle, multiple SLA KPIs can be triggered at different start points. The following illustration depicts how you can define an overall resolution time, and also specify SLA KPIs at different start points.

9.2 Create SLAs in Customer Service Hub

Create SLAs to define conditions and actions that are applicable when an SLA is applied to an entity. The following steps are involved in creating the SLA:

- Create an SLA.
- Create an SLA item.
- Configure actions for the SLA item.
- Activate the SLA.

9.3 Create an SLA

- In Customer Service Hub > Service Management, select SLAs.
- Select New. The New SLA page appears.
- On the General tab, do the following:
 - **Name:** Enter a name for the SLA.
 - **Primary Entity:** Select a value in the box.
 - **Description:** Enter a description for the SLA.
- Select Save. The SLA Items section appears on the page, and the SLA is saved. You can perform the steps to create SLA items as described in the following section.



10. SET UP A SEARCH PROVIDER IN CUSTOMER SERVICE HUB

Knowledge management plays a vital role in enabling organizations to deliver world-class customer care. Allowing the agents to create rich, high-quality knowledge resources and showing the right knowledge content across engagement modalities (including self service, assisted service, and onsite service), expedites issue resolution and drives customer and agent satisfaction and productivity.

The ability to create, import, and share knowledge bases is a core capability of successful support delivery. With knowledge management, agents and supervisors can author knowledge articles from templates, add knowledge search providers from multiple sources (SharePoint, Microsoft Search, and other Dynamics 365 organizations), and receive AI-triggered knowledge suggestions while helping customers to accelerate support delivery.

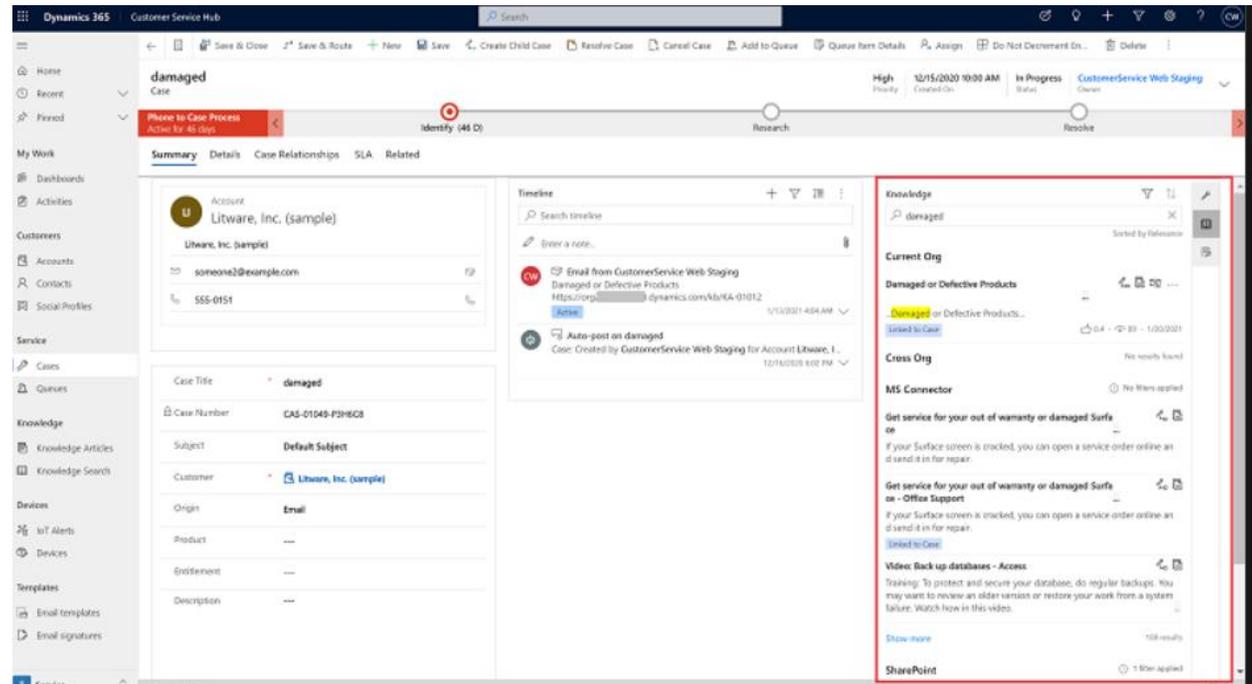
You can use search providers to federate the search of files, documents, or articles from data sources outside of your current Dynamics 365 organization.

You can set up the following search providers:

- **Cross-Organizational Search:** This option allows you to specify a different organization under the same tenant of the current organization and search the articles from that organization. The list from the current tenant is automatically identified.
- **SharePoint (Preview):** This option requires you to enter the SharePoint URL.
- **Microsoft Graph connector (Preview):** This option is for organizations that already use Microsoft Search to index all external data. You only need to specify the unique connection ID when you create the connector.

10.1 Post-configuration agent experience

After you have configured the search providers, an agent who uses the search functionality can view links in their search results for each search provider included in their current org. Search results display the first three articles for each search provider. Agents can select Show more to view additional results.



11. CHAT CHANNEL

Chat is a widely desired channel through which customers prefer to reach customer support. Customers appreciate being able to chat with human agents when self-service options don't allow them to solve their own issues.

Dynamics 365 Customer Service offers full featured, first-party chat capabilities for agents to support customers. Chat transcripts from Power Virtual Agents or other live agents and pre-conversation survey data transfers to live agents to maintain full context of the customer issue as it moves between channels and people. Agents can help customers in the language of their choice with real-time translation, and escalate to voice

and video if a visual demonstration and audio are needed to help customers. Features like quick replies, whisper, barge, consult, and transfer to other agents ensure agents can handle any workflow while chatting with customers.

A chat widget lets your customers connect with your customer service agents and resolve their queries quickly.

11.1 Disclaimer

Microsoft automatically collects data to improve the reliability and performance of our products and to understand how the products are being used. This information is used to make improvements to the product capabilities over time. The live chat widget in Chat for Dynamics 365 collects telemetry automatically from end users to serve the same purposes.

Examples of data collected in the live chat widget:

Data	Example value
OrganizationId	8e9071c2-4415-47aa-b1cb-693631e7fafb
Chat Widget Version	prod
BrowserName	Edge
OSName	Windows
Scrubbed IP Address (last octet redacted)	19.207.000.000

11.2 Configure a chat widget in Omnichannel admin center

Perform the following steps to configure chat in Omnichannel admin center:

- In the site map of Omnichannel admin center, select Workstreams.
- In the All workstreams view, select the workstream for which you want to configure the chat widget.
- On the workstream page, select Set up chat if a chat channel hasn't been created, or select Add chat channel to add a chat widget.
- On the Channel details page, enter a name and select a language in the Name and Language fields, respectively.
- On the Chat Widget page, enter the following details:
 - Title: Display name for the chat widget.
 - Subtitle: Additional title, such as "We're online".
 - Theme color: Choose a color from the list.
 - Logo URL: Select the default value or enter the link to the logo that you want to be displayed.
 - Agent display name: Select a value from the list.
- Set the toggle to yes if you want to enable the following options:

- Proactive chat
- Reconnect to previous chat
- Only show widget during operation hours
 - Operation hours name: Select an operating hour setting. More information: Configure operating hours.
- Only show widget on the provided domains: Enter the link of the portal.
- On the Behaviors page, configure the following options:
 - Custom automated messages
 - Pre-conversation survey
 - Post-conversation survey
 - Authentication settings
 - Customer wait time
 - Show position in queue: Select if you want to show customers their position in the queue when they're waiting to interact with an agent. More information: Show customers their queue position
 - Show average wait time: Select if you want to show to customers the average wait time in the queue when they're waiting to interact with an agent. More information: Show customers their average wait time in a queue
 - Customer location detection: Select a location provider. More information: Set up visitor location detection.
- On the User features page, configure the following options:
 - File attachments
 - Customer notifications
 - Conversation transcripts
 - Voice and video calls: Set the toggle to On and select the calling option.
 - Screen sharing: Set the toggle to On and select a provider.
 - Co-browse: Set the toggle to On and select a provider if you want the agents to see and interact with a customer's web browser.
- Select Save and close.

11.3 Configure a chat widget in Omnichannel Administration

- Sign in to Dynamics 365, and select Omnichannel Administration.
- Go to Channels > Chat.
- Select New. The New Chat Widget page is displayed.
- On the General settings tab, specify the information for the following fields. The Customer waiting and Chat Reconnect options are available only for Live chat. Enter the settings in the fields depending on the type of chat you want to configure.



Section	Field	Description	Example value
General information	Name	Specify the name of the widget.	Contoso chat
	Language	Select the language of the chat widget from the list.	English - United States
	Agent display name	Select an agent display name type from the list: Full name , First name , Last name , and Nick name .	Full name
	Authentication settings	Select an authentication setting from the list. This is an optional field.	Chat authentication
Conversation Mode	Select mode	Select the conversation mode from the list.	Persistent chat or Live Chat
Work distribution	Work stream	Select a work stream from the list. Initially, a default a work stream is selected.	Live work stream

- Select Save. The following sections are displayed:
 - Code snippet: The code snippet that you need to embed in the HTML source of your website to display the chat widget is displayed in the Widget snippet box.
 - Chat Reconnect: The toggle to configure options for providing a reconnect link to the chat user is displayed.
- On the Automated messages tab, set up automated messages for your chat widget.
- On the Location tab, do the following:
 - In the Widget location section, select Add to specify the website domain where the chat widget must be shown. The domain format should not include the protocol (for example, http or https).
 - In the Visitor location section, specify whether you need to detect the visitor's location, and then select a Geo Location Provider.
- On the Related tab, view activity associated with your chat widget, such as survey responses, chat widget locations, and system messages.
- Select Save to save the configurations

11.4 Configure customer notifications

You can configure visual and sound notifications to be sent to customers when they're interacting with agents through the chat widget on your organization portal. If the chat window is minimized or isn't active, a sound notification is played when a message arrives and a count of the unread messages is displayed.

Perform the following steps to enable the customer notifications:

- In Omnichannel admin center, edit a chat widget, and on the Chat channel settings page, select the User features tab.
- For Customer notifications, set the toggle to On. The following checkboxes are displayed as selected:
 - Show number of new messages
 - Play sound notifications for new messages
- Keep the default settings or select one of them depending on your requirement.

You can also configure the customer notifications when you're configuring the chat channel.

12. CONCLUSION

Cognitive Convergence is currently helping a handful of clients implement Dynamics 365 Customer Service, so we can attest that it is a strong product when used in the right situations. The easiest way to mitigate these risks is to hire an independent, technology-agnostic digital transformation consulting firm such as Cognitive Convergence to help validate your software decision, prepare for implementation readiness, help manage your organizational change program, and provide quality assurance over your system integrator.

