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Training Title: Advanced Dynamics 365 Customer Service Solution Design & Development Training

Duration: 10 Days

Daily Duration: 4 Hours (Including breaks)

Mode: Instructor-Led with Hands-on Labs

Custom Core Course formation source: MB-230, PL-200, PL-400

Day 1 – Dynamics 365 Customer Service Foundation & Case Management

Session 1: Introduction to Dynamics 365 Customer Service

- Dynamics 365 Customer Service architecture
- Customer engagement application overview
- Dataverse and the Dynamics 365 ecosystem
- Standard vs customized solutions
- Environment, solutions, and application lifecycle basics

Lab

- Navigate Dynamics 365 Customer Service environment
- Explore entities, forms, views, and records

Session 2: Case Management Fundamentals

- Understanding the Case lifecycle
- Creating and managing cases
- Case statuses and status transitions
- Case resolution and cancellation process
- Parent-child cases

- Entitlements and customer service management

Lab

- Configure and process customer service cases

Session 3: Service Level Agreements (SLAs)

- SLA concepts and components
- KPI instances and timers
- Success and failure conditions
- SLA item configuration
- Pause and resume conditions
- Applying SLAs to cases

Lab

- Configure a custom SLA with KPI tracking

Session 4: Case Routing & Customer Service Workspace

- Routing concepts
- Queue management
- Assignment rules
- Automatic record routing
- Work distribution concepts
- Customer Service Workspace overview
- Agent productivity tools

Lab

- Configure queues and routing rules
- Configure Customer Service Workspace

Session 5: Omnichannel for Customer Service & Contact Center

- Introduction to Omnichannel and Dynamics 365 Contact Center
- Omnichannel architecture and components
- Customer engagement channels:
 - Live Chat
 - SMS
 - Social messaging channels
 - Voice channels overview
- Agent experience within Customer Service Workspace
- Conversations, sessions, and tabs
- Customer timeline and 360-degree view
- Conversation history and context
- Escalating conversations to cases
- Knowledge article suggestions
- Copilot capabilities for agents

Lab

- Explore Omnichannel-enabled Customer Service Workspace
- Create and manage customer conversations

Day 2 – Model-Driven Apps, Dataverse & Security Configuration

Session 1: Model-Driven App Architecture

- Model-driven application components
- App designer
- Navigation and sitemap configuration
- App modules and experiences
- Extending Customer Service applications

Lab

- Modify Customer Service Model-Driven App navigation

Session 2: Dataverse Data Model & Customization

- Dataverse architecture
- Standard vs custom tables
- Creating custom tables
- Columns and data types
- Relationships (1:N, N:1, N:N)
- Choice fields and lookups
- Business rules
- Calculated and rollup columns

Lab

- Create custom tables and relationships
- Extend Case table with custom fields

Session 3: Forms, Views & User Experience Customization

- Main forms and quick create forms
- Form designer
- Tabs, sections, controls
- Business rules on forms
- Views and filtering
- Quick views and subgrids

Lab

- Customize Case forms and views

Session 4: Role-Based Security

- Security model overview
- Business units
- Security roles
- Field-level security
- Teams and ownership

Lab

- Configure custom security roles and permissions

Session 5: Knowledge Management

- Knowledge article lifecycle
- Creating and managing knowledge articles
- Linking knowledge articles to cases
- Search and relevance

Lab

- Create and associate knowledge articles with cases

Day 3 – Business Process Automation with Power Automate

Session 1: Power Platform Automation Overview

- Power Automate architecture
- Cloud flows and their use cases
- Dataverse triggers and actions
- Connection references

Session 2: Automating Dynamics 365 Customer Service Processes

- Automating case creation and updates

- Notifications and escalations
- Email automation
- Approval workflows
- Scheduled processes
- Error handling and monitoring

Lab

- Create a case escalation flow based on SLA conditions

Session 3: Advanced Power Automate for Dataverse

- Working with Dataverse actions
- CRUD operations
- FetchXML and filtering
- Expressions and variables
- Loops and conditions
- Child flows

Lab

- Build an automated case assignment process

Session 4: AI Agents with Copilot Studio

- **Introduction to AI in Dynamics 365 Customer Service**
- Evolution from traditional chatbots to AI agents
- Microsoft Copilot ecosystem overview
- Copilot in Customer Service Workspace
- AI-assisted agent productivity
- **Copilot Studio Fundamentals**
- Copilot Studio architecture

- Agent, topics, and knowledge sources
- Generative answers
- Conversation orchestration
- Agent instructions and behavior tuning
- **Building Customer Service AI Agents**
- Creating an AI agent
- Connecting public websites as knowledge sources
- Connecting Dataverse knowledge
- Using files and SharePoint knowledge sources
- Creating custom topics
- Using generative AI nodes
- **Integrating AI Agents with Dynamics 365**
- Escalating conversations to live agents
- Hand-off to Omnichannel
- Creating and updating cases
- Calling Power Automate flows
- Retrieving customer information from Dataverse

Lab

Build a customer service AI agent that:

- Answers FAQs using website knowledge
- Captures customer issues
- Creates a case using Power Automate
- Transfers complex issues to a live agent

Session 5: Business Process Flows

- Understanding BPF concepts

- Stages and workflows
- Creating custom BPFs
- Branching and conditional stages
- Integrating BPF with business processes

Lab

- Design a custom investigative case management process

Session 6: Omnichannel Routing & Work Distribution

- Unified routing concepts
- Workstreams
- Queues
- Routing rules
- Classification rules
- Assignment methods
 - Highest capacity
 - Round robin
 - Custom assignment
- Presence and capacity management
- Agent availability and workload balancing

Lab

- Configure a queue and workstream with routing rules

Day 4 – Extending Dynamics 365 with Canvas Apps, Custom Pages & JavaScript

Session 1: Canvas Apps Fundamentals

- Canvas App architecture

- Connecting to Dataverse
- Power Fx basics
- User interface design principles

Lab

- Create a simple Canvas App connected to Dataverse

Session 2: Custom Pages in Model-Driven Apps

- What are custom pages?
- When to use custom pages
- Embedding Canvas experiences in Model-Driven Apps
- Passing parameters between Model-Driven Apps and custom pages

Lab

- Build and integrate a custom page into Customer Service

Session 3: Client-Side Development with JavaScript

- Dynamics 365 client API overview
- Form events
- Working with formContext
- Getting and setting field values
- Validation logic
- Notifications and user guidance
- Web resources
- JavaScript best practices

Lab

- Develop JavaScript validations and field automation on Case forms

Session 4: Modern Customization Best Practices

- Low-code vs pro-code decisions
- Solution layering
- Managed and unmanaged solutions
- Environment variables
- Deployment considerations

Lab

- Package customizations using solutions

Day 5 – Advanced Development, Integration & End-to-End Solution Build

Session 1: Dynamics 365 Development Framework

- Extensibility options overview
- Client-side vs server-side customization
- Web API overview
- Custom APIs
- Integration patterns

Lab

- Consume Dataverse Web API from JavaScript

Session 2: Plugins & Front-End Extension Concepts

- Plugin architecture
- Event execution pipeline
- Plugin registration
- Pre-operation and post-operation plugins
- Common plugin scenarios
- Plugin debugging concepts

Lab

- Create and register a simple plugin

Session 3: Investigative Case Management Solution Design

Participants will build a mini solution involving:

- Custom investigative case table
- Additional case information capture
- Security model
- Case lifecycle stages
- SLA tracking
- Routing automation
- Custom forms and views

Session 4: Capstone Project & Best Practices

End-to-End Implementation Exercise

Participants will:

- Customize a Customer Service application
- Configure security
- Build automation flows
- Create a Business Process Flow
- Add a custom page
- Apply JavaScript enhancements

Final Topics

- Performance optimization
- Governance and ALM
- Common implementation mistakes

- Real-world project design considerations