AB-250

Dynamics 365 Contact Center Administration

Course Summary & Lab Guide

Course Overview

This course guides administrators through the end-to-end configuration of Microsoft Dynamics 365 Contact Center, using a continuous scenario in which the learner acts as the system administrator for a fictional specialty coffee equipment company. Working from an initial trial provisioning, learners progressively build a complete, multichannel contact center spanning live chat, voice, and Microsoft Teams collaboration, supported by skill-based routing, knowledge management, and Copilot-powered AI assistance. The labs develop practical skills in user and security administration, work distribution, channel and routing configuration, agent productivity tooling, AI agent deployment, and supervisor oversight. Because each lab builds on the previous one, the course produces a cohesive, working environment rather than a set of isolated exercises. By the end, administrators are equipped to deploy and govern a production-ready contact center that routes work intelligently, equips agents with knowledge and AI, and gives supervisors real-time visibility.

Detailed Lab Summaries

Lab 1: Provisioning a Dynamics 365 Contact Center Trial

- **Objective:** To sign up for a Dynamics 365 Contact Center trial, complete the initial environment configuration, and enable the Copilot data movement setting required for AI features throughout the course.
- **Key Topics Covered:** Trial provisioning, Power Platform admin center, environment URLs, cross-region generative AI data movement, and the Copilot Service admin center layout.
- **Hands-On Activity:** Signing up for the Contact Center trial, verifying the new environment in the Power Platform admin center, recording the environment URL, enabling cross-region data movement for Copilot where required, and exploring the Channels and User management sections of the Copilot Service admin center.
- **Real-World Application:** System administrators use these steps to stand up a new contact center tenant and confirm that the prerequisites for AI-assisted service features are in place before any business configuration begins.

Lab 2: Configuring Users, Security Roles, and Capacity Profiles

- **Objective:** To configure role persona mappings, build a capacity profile that limits simultaneous conversations, and create a routing skill for later use.
- **Key Topics Covered:** Role persona mapping (Agent, Supervisor, Admin), security permissions, capacity profiles, work item limits, assignment blocking, and proficiency-rated skills.

- **Hands-On Activity:** Reviewing persona-to-role assignments, creating a capacity profile limited to three concurrent work items with immediate reset and assignment blocking, assigning that profile to a user, creating a Spanish language skill, and rating the user's proficiency in it.
- **Real-World Application:** Defines who can do what and how much work each representative can take, preventing agent overload and ensuring conversations are matched to staff with the right expertise in production contact centers.

Lab 3: Exploring the Admin Center and Agent Workspace

- **Objective:** To learn how the Copilot Service admin center is organized, update a user's queue assignments, and explore the agent-facing workspace.
- **Key Topics Covered:** Admin center structure (Customer support, Support experience, Operations), routing and calendar settings, queue membership, and the Copilot Service workspace.
- **Hands-On Activity:** Navigating the three admin center groups, assigning an administrator account to the default messaging queue, and exploring the workspace inbox, sessions panel, communication panel, and productivity pane.
- **Real-World Application:** Familiarity with the admin and agent interfaces lets administrators locate settings quickly and ensures representatives are members of the right queues so work can actually be routed to them.

Lab 4: Configuring Queues and Workstreams

- **Objective:** To build the queue and workstream infrastructure that the chat channel uses to receive, prioritize, and distribute conversations.
- **Key Topics Covered:** Inbound messaging workstreams, push distribution, advanced queues, queue priority, operating hours, overflow handling, and assignment methods.
- **Hands-On Activity:** Creating a push-mode chat workstream with a fallback queue, building an advanced queue with business-hours operating schedule, configuring an overflow rule for long wait times, setting Advanced Round Robin assignment, and linking the queue to the workstream with a route-to-queue ruleset.
- **Real-World Application:** Queues and workstreams are the backbone of work distribution; configuring them correctly ensures conversations reach available agents in a fair, prioritized, and hours-aware manner.

Lab 5: Configuring Routing Rules and Skill-Based Routing

- **Objective:** To configure the routing pipeline so conversations are matched to agents by skill and tagged and routed by customer attributes.
- **Key Topics Covered:** Rating models, skill-based routing, skill-matching algorithms (exact match), work classification rulesets, skill attachment rules, and route-to-queue rules.
- **Hands-On Activity:** Creating a language rating model with four proficiency values, enabling exact-match skill routing on the workstream, building skill attachment rules for Spanish-language variants, classifying Trey Research conversations as a Gold service level, and routing Gold conversations to the support queue.

- **Real-World Application:** Skill-based and attribute-based routing directs high-value and specialized conversations to the most qualified agents automatically, improving first-contact resolution and customer experience.

Lab 6: Configuring the Live Chat Widget

- **Objective:** To create, customize, and test a live chat widget that greets customers, captures consent, and collects information before connecting them to an agent.
- **Key Topics Covered:** Chat channels, widget appearance and themes, automated messages, pre-chat surveys, user consent, proactive chat, and embed snippets.
- **Hands-On Activity:** Creating the chat widget on the existing workstream, applying a theme and custom dimensions, adding automated messages, building a pre-chat survey with consent and name questions, enabling proactive chat, copying the embed snippet, and running an end-to-end test conversation through the agent workspace.
- **Real-World Application:** A well-configured chat widget is the customer's first touchpoint on a support site; consent capture and pre-chat data collection support compliance and personalized, efficient service.

Lab 7: Provisioning the Voice Channel

- **Objective:** To provision the voice channel by acquiring a phone number through Azure Communication Services and configuring it for inbound calls.
- **Key Topics Covered:** Azure Communication Services, toll-free phone numbers, calling plans, toll-free verification, voice workstreams, and voice channel settings.
- **Hands-On Activity:** Acquiring and purchasing a toll-free inbound number, creating a voice workstream with a fallback queue, and configuring the voice channel with language, transcription and recording, consult, and transfer options.
- **Real-World Application:** Voice remains a primary support channel; provisioning telephony correctly lets organizations receive customer calls within the same unified platform that handles digital channels.

Lab 8: Configuring Advanced Channel Settings

- **Objective:** To configure consult and transfer behavior, reusable message templates, a custom presence status, and notification handling.
- **Key Topics Covered:** Consult-to-queue and transfer settings, global message templates, custom presence statuses, missed and rejected notification behavior, and sound notifications.
- **Hands-On Activity:** Enabling consult-to-queue and transfer with countdown timers, creating greeting and closing message templates, building a custom “In Training” presence based on Busy, confirming automatic status changes for missed and rejected notifications, and configuring live chat notification sounds.
- **Real-World Application:** These settings govern how conversations behave across their lifecycle, helping agents collaborate, maintain consistent messaging, and avoid having work routed to representatives who are away.

Lab 9: Configuring and Deploying a Voice Agent

- **Objective:** To build a Copilot Studio voice agent that handles inbound calls, collects sensitive input securely, and hands off to representatives when needed.
- **Key Topics Covered:** Copilot Studio, generative AI orchestration, DTMF keypad input, user consent for recording, sensitive data handling (PCI DSS), telephony, and AI agent assignment.
- **Hands-On Activity:** Creating a voice agent with generative orchestration and basic voice, building a user-consent topic wired to the conversation start, collecting a 4-digit PIN via DTMF as sensitive data, enabling telephony and publishing, enabling recording with consent on the workstream, and assigning the agent to the voice workstream.
- **Real-World Application:** Voice agents deflect and triage calls before human involvement, while secure DTMF capture and consent handling keep sensitive customer data compliant with privacy and payment regulations.

Lab 10: Configuring Experience Profiles and Workspace Templates

- **Objective:** To create an experience profile and the session, tab, and inbox templates that define what agents see when handling conversations.
- **Key Topics Covered:** Experience profiles, productivity pane tools, application tab templates, session templates, communication panel modes, and the agent inbox.
- **Hands-On Activity:** Removing the user from the default profile and creating a Contoso Support Representative profile, enabling productivity tools, building an account-record tab template and a chat session template, associating the session template with the workstream, and configuring an inbox view for open chats.
- **Real-World Application:** Experience profiles tailor the workspace to each role, surfacing the right tools and customer context so agents work efficiently without distraction from features they don't need.

Lab 11: Configuring Scripts, Macros, and Productivity Tools

- **Objective:** To build a guided agent script, automate case creation with a macro, and configure rules-based suggested contacts.
- **Key Topics Covered:** Agent scripts, macros, productivity automation, the Omnichannel connector, session template association, and rules-based suggested contacts for Teams.
- **Hands-On Activity:** Building a macro that creates and links a case from the conversation, creating a four-step chat script (including a macro step), associating the script with the session template, and configuring rules-based suggested contacts for case records with a custom queue-members rule.
- **Real-World Application:** Scripts and macros enforce consistent service steps and remove repetitive manual data entry, improving quality and freeing agents to focus on the customer rather than the tooling.

Lab 12: Enabling Teams Chat Collaboration

- **Objective:** To enable embedded Microsoft Teams chat so representatives can consult colleagues without leaving a conversation, with the chat linked to the record.
- **Key Topics Covered:** Embedded Teams chat, enhanced Teams integration, tenant admin consent, Microsoft Purview confidential labels, and record-type linking.

- **Hands-On Activity:** Turning on Teams chat for all Dynamics 365 apps, enabling enhanced integration and confidential labels with admin consent, linking Teams chats to conversation records, enabling Teams chat in the experience profile, and testing a connected chat from a conversation record.
- **Real-World Application:** Embedded collaboration lets frontline agents pull in specialists in real time while preserving a linked consultation history, improving resolution on complex cases and supporting compliance.

Lab 13: Configuring Knowledge Management

- **Objective:** To configure knowledge settings, build a category structure, create an article template, and author and publish a troubleshooting article.
- **Key Topics Covered:** Knowledge management record types, automatic search, knowledge categories, article templates, rich-text authoring, and article approval and publishing.
- **Hands-On Activity:** Enabling knowledge search for Account records, setting general search options, creating a product category hierarchy, building a troubleshooting article template, and authoring, categorizing, approving, and publishing the LCD screen troubleshooting article.
- **Real-World Application:** A well-structured, searchable knowledge base lets agents find consistent, accurate answers quickly and underpins AI features that surface relevant articles during conversations.

Lab 14: Configuring Copilot Features

- **Objective:** To configure Copilot so it surfaces knowledge automatically, assists representatives in real time, and to review optional Contact Center AI agents.
- **Key Topics Covered:** Copilot settings, knowledge sources, custom instructions, per-profile Copilot AI features, and the Customer Assist, Quality Assurance, and Service Operations agents.
- **Hands-On Activity:** Verifying Copilot prerequisites and data movement, connecting the Dynamics 365 knowledge base as a Copilot source with custom instructions, enabling Copilot features on the experience profile, and optionally configuring the Customer Assist, Quality Assurance, and Service Operations agents.
- **Real-World Application:** Copilot reduces handle time by drafting responses and surfacing knowledge in real time, while specialized AI agents extend automation into quality scoring and operational guidance.

Lab 15: Configuring Supervisor Controls and Monitoring Live Conversations

- **Objective:** To enable supervisor oversight through screen recording, context variables, an orchestration playbook, and a custom analytics security role.
- **Key Topics Covered:** Screen recording, context variables, conversation orchestration playbooks (preview), overflow handling, QA scoring thresholds, and custom security roles.
- **Hands-On Activity:** Enabling screen recording in the experience profile, adding CustomerTier and IssueCategory context variables to the chat workstream, building an overflow playbook that offers callbacks to premium urgent customers and transfers others to the default queue, and creating a read-only analytics security role assigned to a user.

- **Real-World Application:** Supervisor controls give team leads visibility into live work, automated overflow handling, and quality oversight while scoped security roles grant reporting access without over-provisioning admin rights.