# Transform Contact Center Experiences with AI in Dynamics 365

Course AB-250 3 Days Instructor-led, Hands-on

## Introduction

This course teaches learners how to configure and operate an intelligent contact center using Microsoft contact center capabilities and integrated AI features. Learners focus on deploying and configuring contact center environments, including embedded and standalone modes, connecting data sources and third-party Contact Center as a Service (CCaaS) solutions, and enabling Copilot and agent capabilities that enhance the customer and agent experience. The course emphasizes understanding how channels, users, and security settings work together to support scalable and efficient customer engagement.

## Who Should Attend?

This course is intended for implementation professionals who are responsible for designing, configuring, and deploying contact center solutions and want to deepen their skills at the intermediate level. It is designed for learners who already understand basic contact center concepts and are ready to learn how to configure channels, users, security, work distribution, routing strategies, and AI-assisted capabilities in real-world implementations. Learners use this course to build confidence in configuring scalable, intelligent contact center solutions that support agent productivity, customer engagement, and supervisor oversight across voice and digital channels.

## Outline

### Module 1: Introduction to implementing Dynamics 365 Contact Center

- Explore the core capabilities of Dynamics 365 Contact Center
- Explore contact center architecture
- Security, governance, and compliance
- Discover the prebuilt AI agents and AI maturity model
- Cost and licensing

### Module 2: Configure Dynamics 365 Contact Center core capabilities

- Explore the Copilot Service admin center
- Configure the Copilot Service workspace
- Embed the Contact Center widget in non-Microsoft CRM systems
- Set up Copilot and agents in Contact Center

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- Manage users in Dynamics 365 Contact Center
- Configure ALM for Contact Center deployments

## Module 3: Configure queues in Dynamics 365 Contact Center

- Create and manage queues for unified routing
- Manage queue availability
- Control work distribution within a queue

## Module 4: Configure routing in Dynamics 365 Contact Center

- Configure workstreams and work classification rules
- Configure the engagement agent
- Configure routing
- Troubleshoot routing using conversation diagnostics

## Module 5: Configure chat and digital channels in Dynamics 365 Contact Center

- Overview of channels
- Configure digital channels
- Configure the chat channel
- Configure advanced settings for the chat channel
- Configure a custom channel

## Module 6: Configure the voice channel in Dynamics 365 Contact Center

- Set up and provision the voice channel
- Set up a voice workstream
- Define voice queues
- Make and receive calls
- Integrate an IVR system with the voice channel
- Analytics, reports, and call insights

## Module 7: Configure advanced settings for channels in Dynamics 365 Contact Center

- Manage advanced conversation settings
- Configure advanced message settings
- Configure the timeline
- Configure the Channel Integration Framework
- Configure feedback with Copilot Studio

## Module 8: Design and deploy intelligent voice agents in Dynamics 365 Contact Center

- Understand voice agent architecture and orchestration
- Customize voice agents for your organization
- Configure multilingual voice agents
- Security and compliance for voice agents

## Module 9: Optimize staffing with workforce management in Dynamics 365 Contact Center

- Explore workforce management capabilities for your contact center
- Configure forecasting
- Configure shift management and scheduling
- Integrate third-party workforce management solutions

## Module 10: Tailor the agent workspace with experience profiles in Dynamics 365 Contact Center

- Create and configure experience profiles
- Configure templates for sessions and notifications
- Configure the inbox for service representatives

## Module 11: Accelerate service delivery with productivity tools in Dynamics 365 Contact Center

- Configure scripts and macros
- Enable custom productivity panels
- Enable Teams collaboration
- Extend productivity tools

## Module 12: Configure knowledge management in Dynamics 365 Customer Service and Contact Center

- Describe the knowledge management process and configure settings
- Author and publish knowledge articles
- Configure the Customer Knowledge Management Agent
- Manage knowledge article versions, categories, and translations
- Configure internal knowledge search
- Integrate and search external knowledge sources
- Module assessment

## Module 13: Configure AI agents and Copilot in Dynamics 365 Contact Center

- Understand the AI landscape in Dynamics 365 Contact Center

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- Configure the Customer Assist Agent
- Configure the Quality Assurance Agent
- Configure the Service Operations Agent
- Configure Copilot to assist your service representatives
- Extend Copilot with plugins and measure its impact

## Module 14: Manage contact center operations with supervisor tools in Dynamics 365 Contact Center

- Enable supervisor controls for live conversations
- Monitor conversations and take action in real time
- Grant access to analytics and dashboards

## Module 15: Reach customers first with proactive engagement in Dynamics 365 Contact Center

- Set up proactive engagement
- Configure proactive campaigns
- Set up the proactive engagement dashboard

## Module 16: Unlock insights with analytics and reporting in Dynamics 365 Contact Center

- Explore built-in analytics and reporting capabilities
- Extend analytics with Power BI data model customization
- Monitor conversation health with Azure Application Insights