Microsoft Dynamics 365

Dynamics 365 Customer Service
Implementation Resources

Presenters:
Michele Mazzucco – FastTrack Solution Architect
Ramanujam Raghunathan – FastTrack Solution Architect
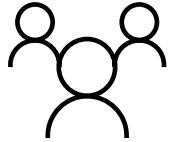**Avinash Mishra–** FastTrack Solution Architect

TechTalk Series

- *Implementation Resources – introduction (*[*link*](#)*)*

- **Channel Integration Framework 2.0** ←
- Samples and tools
- Testing for Service
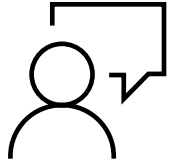- Analytics for Service

Agenda

- Simulator for CIF 2.0
- Click-to-run outbound calls
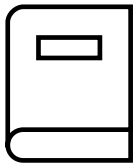
FastTrack and Implementation Guide

FastTrack for Dynamics 365 is a customer success program powered by the Microsoft engineering team to enable organizations to accelerate Dynamics 365 implementations and Go-live with confidence

[About FastTrack for Dynamics 365 - Dynamics 365 | Microsoft Learn](#)

Success by Design is the prescriptive guidance - approaches & recommended practices - and framework for designing, building and deploying a Dynamics 365 solution

[Introduction to Success by Design - Dynamics 365 | Microsoft Learn](#)

The implementation guide represents the collective knowledge and experience of the FastTrack for Dynamics 365 team, gained over thousands of Dynamics 365 implementations.

https://aka.ms/d365implementationguide

Dynamics 365 Customer Service
Implementation Optimization Resources

📄 aka.ms/d365csresources

Customer Service Implementation Resources

❓Are these resources officially supported by Microsoft?

- ☑ This is community content, offered "as-is" and not part of Microsoft products
- ☑ Meant to be a starting point for you to implement your project
- ☑ All code and solutions are starter samples for your implementation, not a final product
- ☑ All tutorials and guidance are in line with Microsoft's best practices

❓Can I contribute to these resources?

- ☑ Some of the items will have a corresponding GitHub repo (e.g., code samples)
- ☑ We'll evaluate other forms of collaboration

❓Can I submit my ideas for new resources?

- ☑ Submit your suggestions in the [Ideas portal](#)
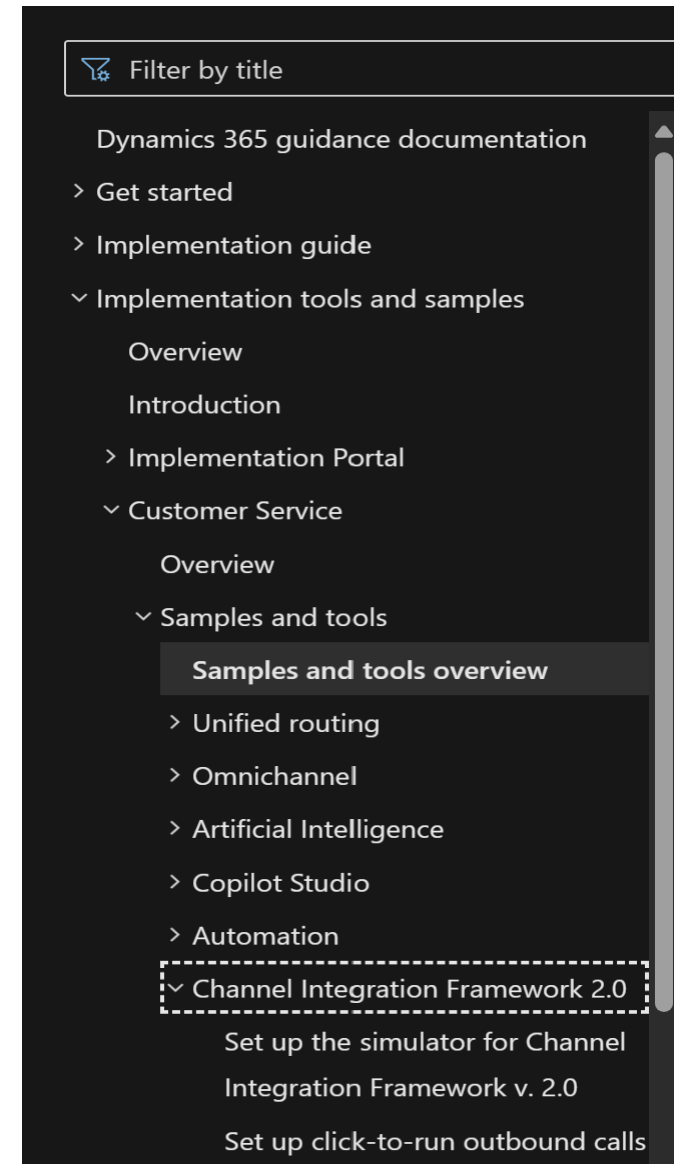- ☑ Leverage any FastTrack engagement you have on your project

Samples and tools - Overview

Areas:

- Simulator for CIF v2.0 Framework

- Click to Dial

Filter by title

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> Get started
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      > Unified routing
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      > Artificial Intelligence
      > Copilot Studio
      > Automation
      ∨ Channel Integration Framework 2.0
        Set up the simulator for Channel Integration Framework v. 2.0
        Set up click-to-run outbound calls

[Implementation tools and samples- Dynamics 365 | Microsoft Learn](#)

Introduction to Channel Integration Framework

- Dynamics 365 Channel Integration Framework is a cloud-to-cloud extensible framework to integrate third-party channel providers with Dynamics 365 model-driven apps using a browser-based JavaScript API library.

- With this framework, you can integrate any third-party telephony provider or telephony aggregators into a model-driven app, where the Dynamics 365 Channel Integration Framework acts as an interface between the providers or aggregators and a model-driven app.

Channel Integration Framework Version

Feature	Version 1.0	Version 2.0
Session	Single-session	Multisession
Model-driven app	Dynamics 365 Customer Service Dynamics 365 Sales Dynamics 365 Project Service Dynamics 365 Field Service	Customer Service workspace
Deployment/provisioning	Using Dynamics 365 Channel Integration Framework 1.0 model-driven app	Deployed with Customer Service workspace
Communication panel	Right side	Left side
Communication panel modes	Minimized Expanded	Docked Minimized Hidden
Features	Support for one channel provider at any time Communication panel management	Support for multiple telephony channel providers Communication panel management Channel analytics Notification management templates Application tab management templates Session management templates

Channel Integration Framework – CIF Simulator V2.0

Ramanujam Raghunathan

Microsoft Dynamics 365

Simulator for CIF API v2.0

- The sample simulator is a resource to help optimize the Dynamics 365 implementation and Channel Integration Framework version 2.0 experiences. Use the Channel Integration Framework simulator solution to test and learn the work processes before you go live in production.

https://optimize25dccpdev.crm.dynamics.com/main.aspx?appid=943b4e7e-cb9f-ed11-aad1-000d3a313da3

Dynamics 365   Customer Service workspace   Search   SANDBOX   New look

Home   CIF 2.0 Simulator Home

CIF2 Simulator

Search   Filter with   None

Slugs and Attributes

First Name (extn_firstname)
John

Last Name (extn_lastname)
Glynn

Telephone (extn_phonenumber)
1234567890

Business Phone (extn_businessphone)
9876543210

E-mail Address (extn_email_address)
someone_jh@example.com

Subject (extn_subject)
Unable to login

Street Address (extn_streetaddress)

City (extn_city)

State (extn_State)

ZipCOde (extn_zipcode)

Interaction/Call Id (extn_interactionid)
+ Guid
716dea92-6d28-4860-9a3c-d4b63b95a9de

Customer Data Slugs

Customer Name
A Datum Corporation

Customer Entity Name
account

Customer Record Id (GUID)
ea7092de-6dbe-ed11-83ff-00224805c952

Notify, accept > create session || reject > create task

Create Session with Custom Page

Get all sessions

Get current session

Change current session's title

Notify new activity in other sessions

Notify urgency in sessions

Click-to-run Outbound Calls

Control allows you provides an option to enable outbound call and validates the phone number inputted.

Custom Control allows to conveniently format a phone number and initiate outbound calls directly from relevant fields

Customer Service workspace

Dynamics 365 | Customer Service workspace

SANDBOX

New look

Home

Customer Service Agent Dash... | Omnichannel Ongoing Conve... | Contacts My Active Contac...

Focused view | Show Chart | + New | Delete | Refresh | Collaborate | Visualize this view | Email a Link | Flow | Share

My Active Contacts

Edit columns | Edit filters | Filter by keyword

	Full Name ↑	Email	Company Name	Business Phone
	Jacob test	abc@abc.com	Contoso Bank	8877883456
	John Smith			

Rows: 2

QUESTIONS

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Before attending this event, take some time to explore our Performance testing with Jmeter blog series [https://nam06.safelinks.protection.outlook.com/?url=https%3A%2F%2Fcommunity.dynamics.com%2Fblogs%2Fpost%2F%3Fpostid%3D587b9524-30c9-422c-a5f8-4e37

29 Mar 2024   Alejandra Cabrales   ♡ (2)

TechTalk: Dynamics 365 Automated Regression Testing with Leapwork | August 30 or 31, 2023

Regression testing is an absolute must in the Dynamics 365 ecosystem. It enables teams to accelerate release cycles, increasing testing coverage, improve time and cost efficiency and ensure bugs are detected proactively as early as possible. There ar

29 Aug 2023   Alejandra Cabrales   ♡ (2)

Upcoming TechTalk: Introduction to implementation Optimization resources, samples and tools ...

As part of the existing Implementation Guide, the FastTrack team created a collection of resources to help customer and partners implementing Dynamics 365 solutions. In this series we'll explore the available resources for Customer Service implementa

11 Apr 2024   Alejandra Cabrales   ♡ (1)

Upcoming TechTalk: Source to Pay business process overview in Dynamics 365 Finance & Supply

Dankie Faleminderit **Shukran** Chnorakaloutioun Hvala Blagodaria

Děkuji **Tak** Dank u Tänan Kiitos **Merci** Danke Ευχαριστώ A dank

Mahalo תודה. **Dhanyavād** Köszönöm Takk Terima kasih **Grazie** Grazzi

Thank you!

감사합니다 Paldies Choukrane Ačiū **Благодарам** ありがとうございました

谢谢 Баярлалаа **Dziękuję** Obrigado Mulţumesc **Спасибо** Ngiyabonga

Ďakujem Tack Nandri Kop khun **Teşekkür ederim** Дякую Хвала Diolch