



# D365 Contact Center







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# ***"Kärt barn har många namn"***



Dynamics 365 Contact Center

*2024 - present*



Dynamics 365 Customer Service

(Core Service Module) - *present*

Digital Contact Center Platform (DCCP)

*2022-present*

Dynamics 365 Omnichannel for Customer Service

*2019-2023*

Unified Service Desk (USD)

*pre-2020*

# "Copilot Service"

~~Customer Service Workspace &  
Contact Center Workspace~~  
Copilot Service Workspace

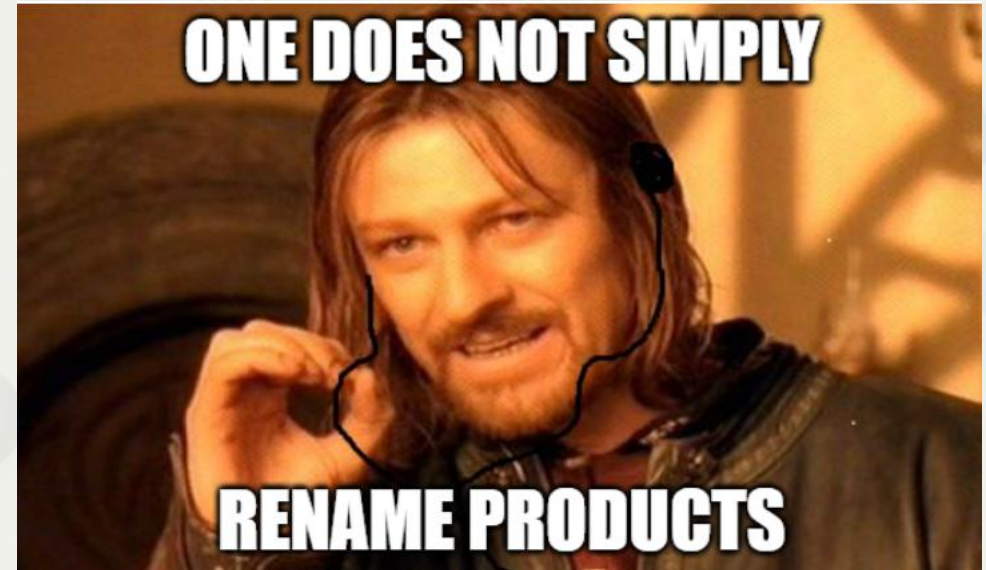
~~Customer Service Admin center &  
Contact Center Admin center~~  
Copilot Service Admin center





# But let's back up...

A digital Contact Center Platform  
– what is that?



# One CCaaS solution to rule them all


CCaaS (Contact Center as a Service) is a cloud-based solution for managing customer interactions across multiple channels:

 Voice (Telephony & IVR)

 Chat & Messaging

 Email

 Social Media

 AI-powered automation



+

Work Force Management  
Interactive Voice Response  
Analytics and Reporting





# One CCaaS solution to rule them all



D365 Contact Center is a full Contact Center as a Service (CCaaS) solution

Omnichannel is a modular add-on for D365 Customer Service Customer Engagement Center (CEC)

← Deployment strategy →



# Modularity options

## SCENARIO "I want a consistent approach to channels in my contact center."

- Looking to replace existing CCaaS and / or extend digital and voice channels.
- Looking for a unified, omnichannel agent experience connected to your CRM
- Looking to improve deflection of contacts with self-service voice and digital bots.

Opportunity to discuss Omnichannel (Digital, Voice, D+V). AI powered Unified Routing. "Ask A Question" knowledge chat. Real-time transcription and call intelligence.

For existing Dynamics 365 CRM clients, add Contact Center for voice and digital channels with live agent assist and self-service bots, Unified Routing, R/T transcription with intelligence.

Keep my existing CRM. Replace my CCaaS channels for live and self-service bot experiences, Unified Routing, R/T transcription with intelligence.



Dynamics 365  
Customer Service  
Premium



Dynamics 365 Contact  
Center

## SCENARIO "I want to consolidate vendors and modernize my contact center."

- Looking to revisit existing CRM solution
- Want AI capabilities for agent assist, digital and voice channels, knowledge management, supervision and Business Insights.

Opportunity to discuss D365 Customer Service Enterprise or D365 Contact Center.

I'm ready to modernize my existing infrastructure for CRM and channels.

I'm ready to modernize my CRM while maintaining my existing channels/CCaaS solution.



Dynamics 365  
Customer Service  
Premium








D365 Customer  
Service Enterprise







# Transitioning to the multi-session app

## Customer Service Hub

-  **Single-session** → Traditional model-driven app, entity based views
-  **Static workspace experience** → WYSIWYG
-  **Standard case management** with form-based workflows
-  No built-in multi-channel support
-  **Limited AI**; no extensibility for Copilot in CS

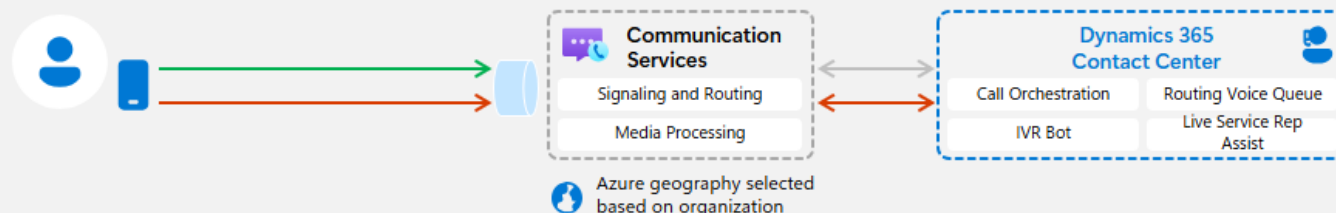
## Contact Center/Customer Service Workspace

-  **Multi-session handling** → Agents can manage multiple cases and conversations in parallel
-  **Split-screen** for cases, conversations & productivity
-  **Integrated Omnichannel** → Chats, emails, and voice interactions appear in a single workspace
-  Extensible **Copilot** model
-  **Context-aware experience** → Automatically retrieves case history and customer details



# Infrastructure options

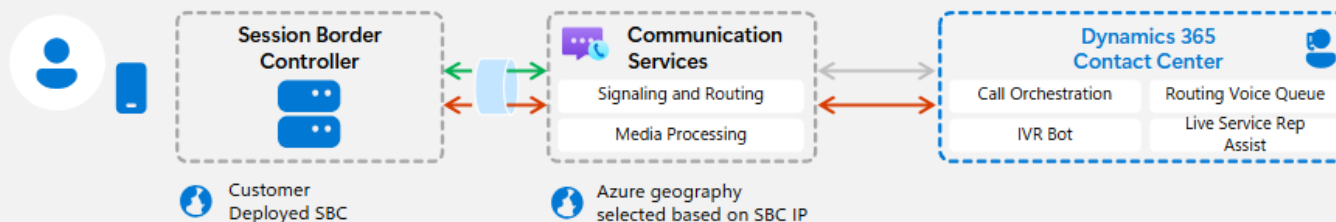
## Option 1: Microsoft Direct Offer Use Microsoft as your voice carrier



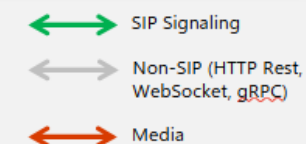
Microsoft offers calling plans for:

- Inbound Toll Free
- Inbound Local Calling
- Outgoing Calling
- SMS Messaging

## Option 2: Microsoft Direct Routing Bring Your Own Carrier (BYOC) to Microsoft



Customer provisioned carrier services for Inbound and Outgoing Voice with SIP Trunk delivery to Microsoft





# Teams Phone with D365 Contact Center

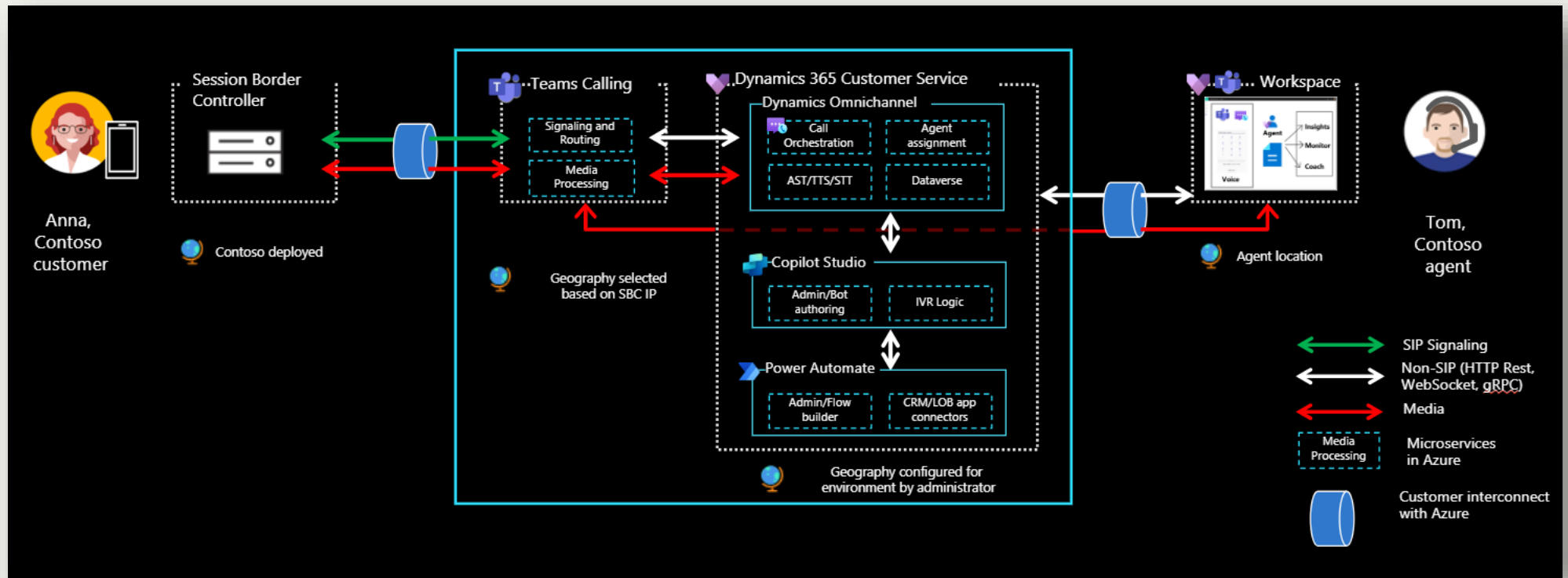


Removing need for customers to bring own Azure Communication Services resource, simplifying onboarding.

Take advantage of wide geographic availability of Teams Phone Numbers:

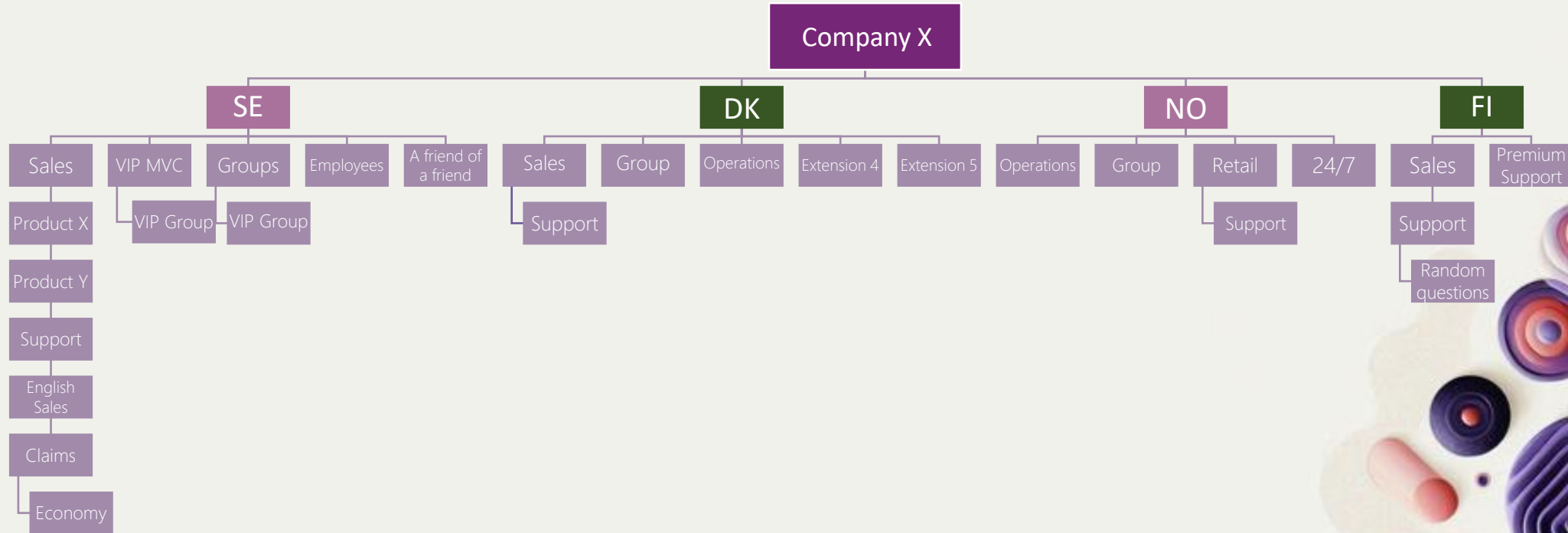
- Calling Plans
- Direct routing
- Operator connect

# Teams Phone with D365 Contact Center

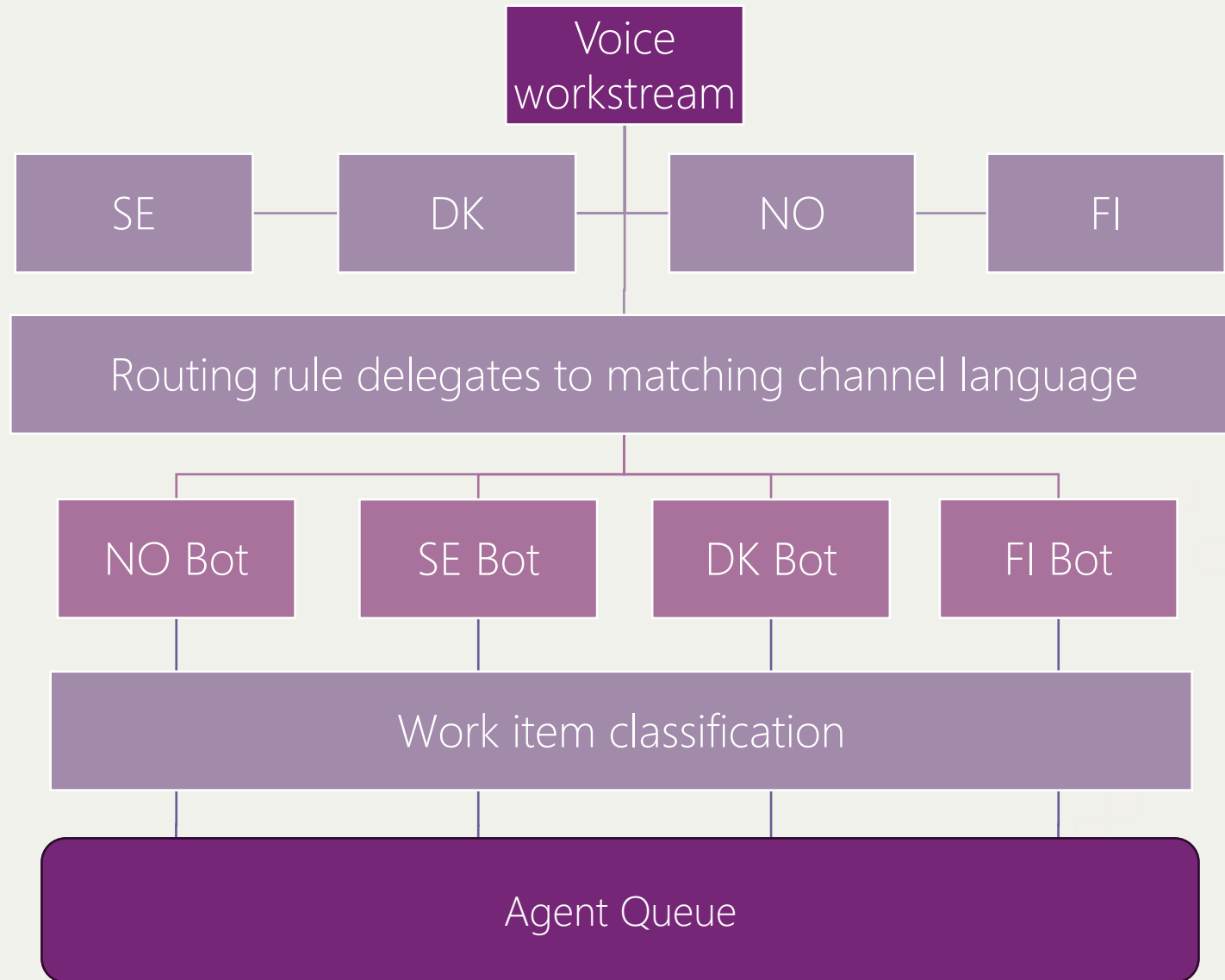




# Use case: Queue setup in old solution



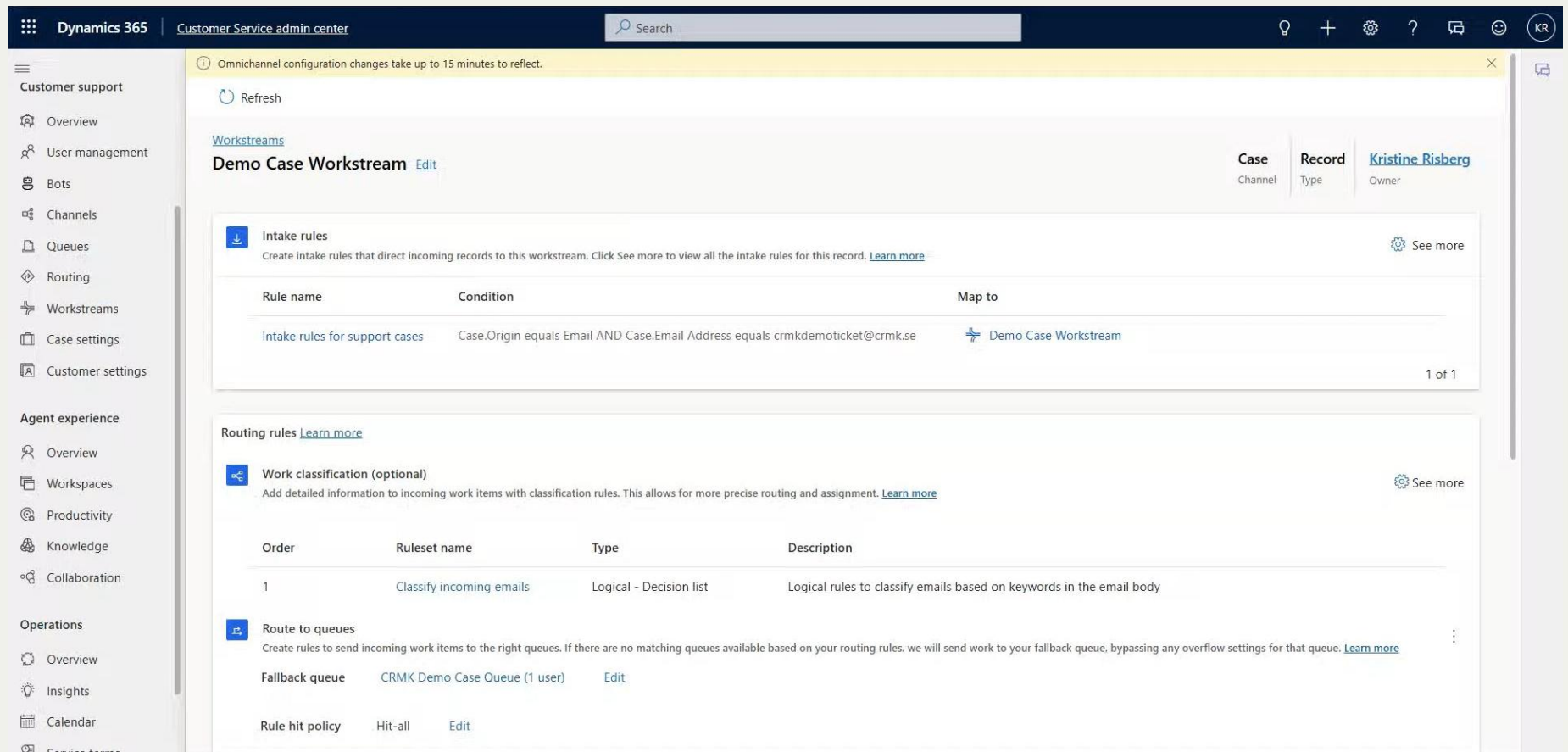
# Use case: setup in D365 Contact Center





# Workstream & channel settings

- Intake rules; conditioning for which records to route to this workstream



The screenshot displays the Dynamics 365 Customer Service admin center interface. The left sidebar contains navigation options under 'Customer support', 'Agent experience', and 'Operations'. The main content area shows the 'Demo Case Workstream' configuration page. At the top, a yellow banner indicates that omnichannel configuration changes take up to 15 minutes to reflect. Below this, a 'Refresh' button is present. The page title is 'Demo Case Workstream' with an 'Edit' link. On the right, there are tabs for 'Case Channel', 'Record Type', and 'Owner' (Kristine Risberg). The 'Intake rules' section includes a description and a 'See more' link. Below it is a table with columns for 'Rule name', 'Condition', and 'Map to'. The table contains one rule: 'Intake rules for support cases' with the condition 'Case.Origin equals Email AND Case.Email Address equals crmkdemoticket@crmk.se' and mapped to 'Demo Case Workstream'. The 'Routing rules' section also includes a description and a 'See more' link. Below it is a table with columns for 'Order', 'Ruleset name', 'Type', and 'Description'. The table contains one rule: 'Classify incoming emails' with type 'Logical - Decision list' and description 'Logical rules to classify emails based on keywords in the email body'. The 'Route to queues' section includes a description and a 'See more' link. Below it is a table with columns for 'Fallback queue', 'Rule hit policy', and 'Hit-all'. The table contains one rule: 'CRMK Demo Case Queue (1 user)' with hit policy 'Hit-all' and an 'Edit' link.

**Dynamics 365** | Customer Service admin center

Search

Omnichannel configuration changes take up to 15 minutes to reflect.

Refresh

[Workstreams](#)

**Demo Case Workstream** [Edit](#)

Case Channel | Record Type | Owner: [Kristine Risberg](#)

**Intake rules** [See more](#)

Create intake rules that direct incoming records to this workstream. Click See more to view all the intake rules for this record. [Learn more](#)

Rule name	Condition	Map to
Intake rules for support cases	Case.Origin equals Email AND Case.Email Address equals crmkdemoticket@crmk.se	<a href="#">Demo Case Workstream</a>

1 of 1

**Routing rules** [Learn more](#)

**Work classification (optional)** [See more](#)

Add detailed information to incoming work items with classification rules. This allows for more precise routing and assignment. [Learn more](#)

Order	Ruleset name	Type	Description
1	<a href="#">Classify incoming emails</a>	Logical - Decision list	Logical rules to classify emails based on keywords in the email body

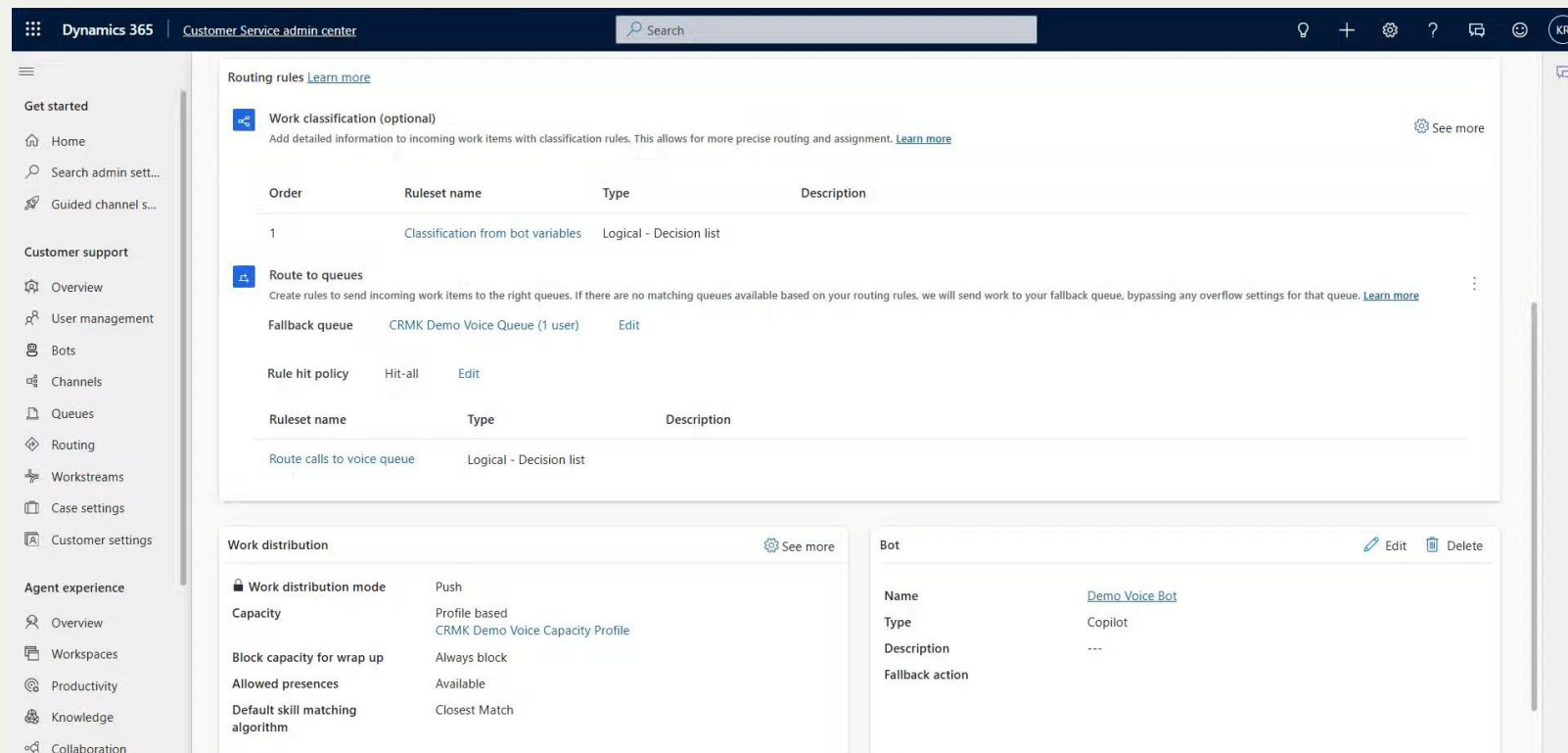
**Route to queues** [See more](#)

Create rules to send incoming work items to the right queues. If there are no matching queues available based on your routing rules, we will send work to your fallback queue, bypassing any overflow settings for that queue. [Learn more](#)

Fallback queue	Rule hit policy	Hit-all
<a href="#">CRMK Demo Case Queue (1 user)</a>	Hit-all	<a href="#">Edit</a>

# Workstream & channel settings

- Classification rules; set values in standard fields *or* use context variables from the conversation to match against agent skills



The screenshot displays the Dynamics 365 Customer Service admin center interface. The left sidebar contains navigation options under 'Get started', 'Customer support', and 'Agent experience'. The main content area is titled 'Routing rules' and includes a 'Learn more' link. It features a table for 'Work classification (optional)' with columns for Order, Ruleset name, Type, and Description. Below this is a 'Route to queues' section with a 'Fallback queue' dropdown set to 'CRM Demo Voice Queue (1 user)' and an 'Edit' link. A 'Rule hit policy' section shows 'Hit-all' with an 'Edit' link. A table below lists 'Ruleset name' and 'Type'. The bottom section is divided into 'Work distribution' and 'Bot' settings. The 'Work distribution' section includes 'Work distribution mode' (Push), 'Capacity' (Profile based), 'Block capacity for wrap up' (Always block), 'Allowed presences' (Available), and 'Default skill matching algorithm' (Closest Match). The 'Bot' section shows 'Name' (Demo Voice Bot), 'Type' (Copilot), 'Description' (---), and 'Fallback action'.

**Routing rules** [Learn more](#)

**Work classification (optional)**  
Add detailed information to incoming work items with classification rules. This allows for more precise routing and assignment. [Learn more](#) [See more](#)

Order	Ruleset name	Type	Description
1	Classification from bot variables	Logical - Decision list	

**Route to queues**  
Create rules to send incoming work items to the right queues. If there are no matching queues available based on your routing rules, we will send work to your fallback queue, bypassing any overflow settings for that queue. [Learn more](#)

**Fallback queue** CRM Demo Voice Queue (1 user) [Edit](#)

**Rule hit policy** Hit-all [Edit](#)

Ruleset name	Type	Description
<a href="#">Route calls to voice queue</a>	Logical - Decision list	

**Work distribution** [See more](#)

<b>Work distribution mode</b>	Push
<b>Capacity</b>	Profile based CRM Demo Voice Capacity Profile
<b>Block capacity for wrap up</b>	Always block
<b>Allowed presences</b>	Available
<b>Default skill matching algorithm</b>	Closest Match

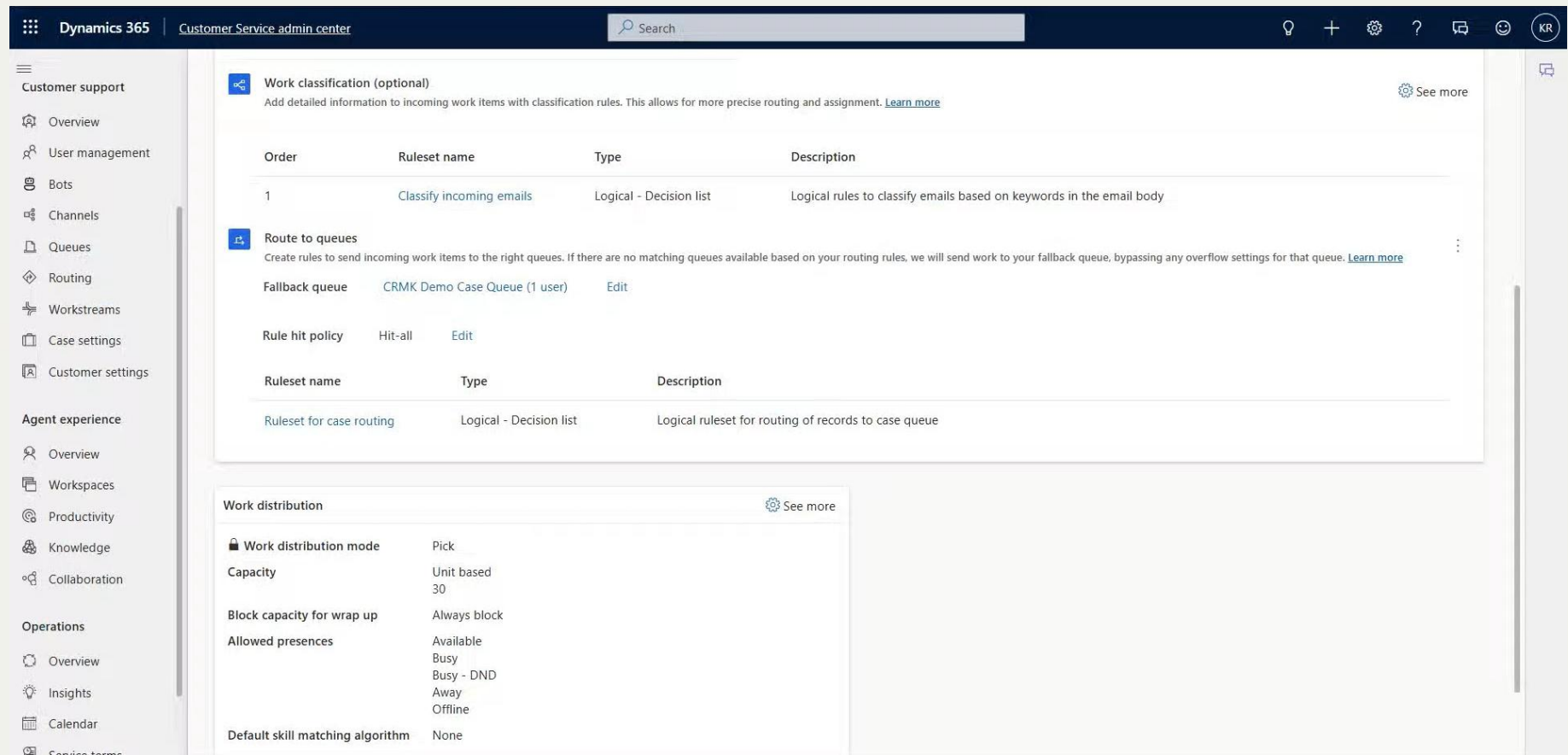
**Bot** [Edit](#) [Delete](#)

<b>Name</b>	<a href="#">Demo Voice Bot</a>
<b>Type</b>	Copilot
<b>Description</b>	---
<b>Fallback action</b>	



# Workstream & channel settings

- Route to queues; routing rulesets based on 🙋 attributes



The screenshot displays the Dynamics 365 Customer Service admin center interface. The left sidebar contains navigation links for Customer support, Agent experience, and Operations. The main content area is divided into two sections: Work classification (optional) and Work distribution.

**Work classification (optional)**

Add detailed information to incoming work items with classification rules. This allows for more precise routing and assignment. [Learn more](#)

Order	Ruleset name	Type	Description
1	Classify incoming emails	Logical - Decision list	Logical rules to classify emails based on keywords in the email body

**Route to queues**

Create rules to send incoming work items to the right queues. If there are no matching queues available based on your routing rules, we will send work to your fallback queue, bypassing any overflow settings for that queue. [Learn more](#)

Fallback queue: [CRM Demo Case Queue \(1 user\)](#) [Edit](#)

Rule hit policy: Hit-all [Edit](#)

Ruleset name	Type	Description
<a href="#">Ruleset for case routing</a>	Logical - Decision list	Logical ruleset for routing of records to case queue

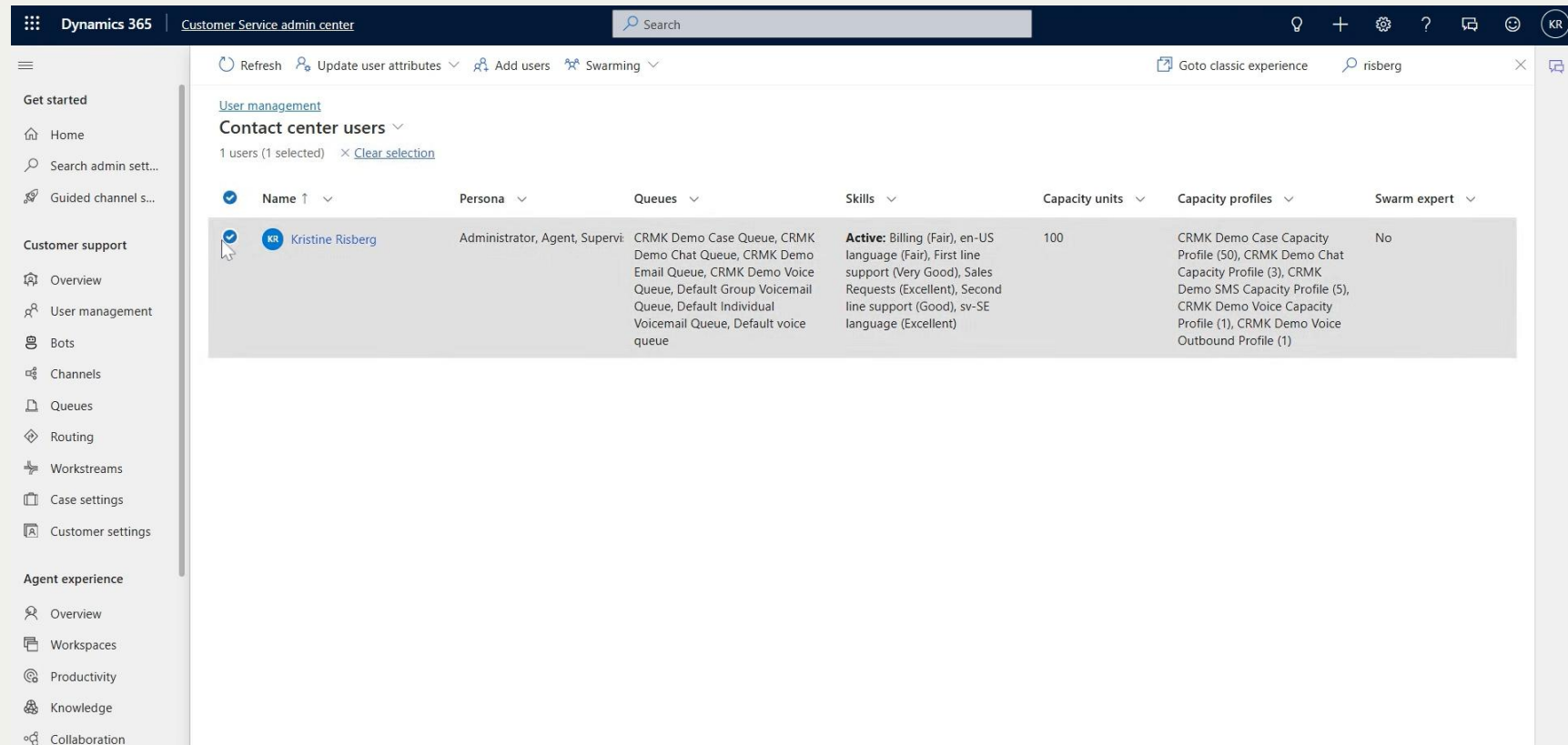
**Work distribution**

[See more](#)

Work distribution mode	Pick
Capacity	Unit based 30
Block capacity for wrap up	Always block
Allowed presences	Available Busy Busy - DND Away Offline
Default skill matching algorithm	None

# Workstream & channel settings

- Agent assignment; skill based, preferred agent, intent based in relation to skills, capacity and availability

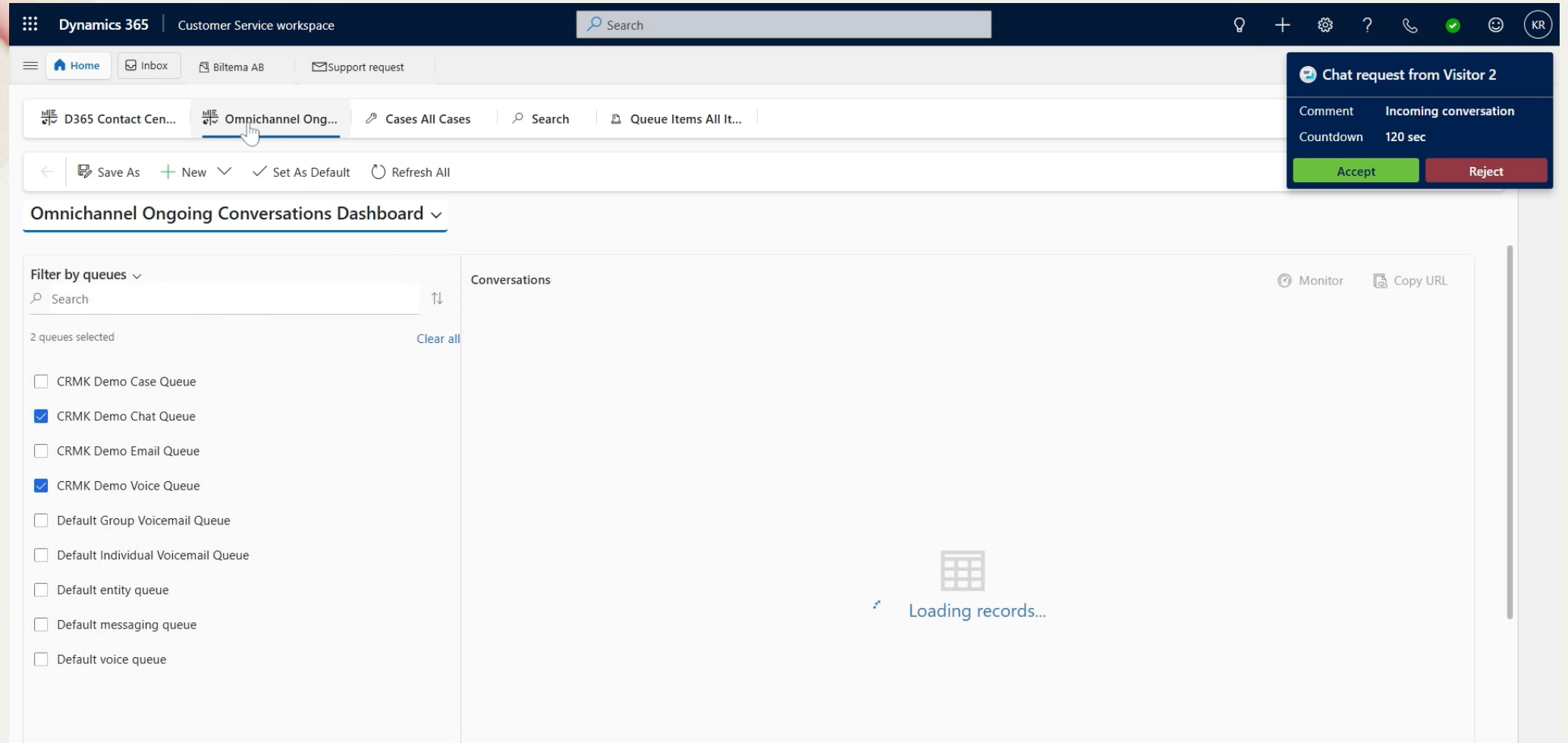


The screenshot displays the Dynamics 365 Customer Service admin center interface. The left sidebar contains navigation options under 'Get started', 'Customer support', and 'Agent experience'. The main content area shows the 'Contact center users' table, which lists user details including Name, Persona, Queues, Skills, Capacity units, Capacity profiles, and Swarm expert. The user Kristine Risberg is selected.

	Name ↑	Persona	Queues	Skills	Capacity units	Capacity profiles	Swarm expert
<input checked="" type="checkbox"/>	KR Kristine Risberg	Administrator, Agent, Supervi	CRMK Demo Case Queue, CRMK Demo Chat Queue, CRMK Demo Email Queue, CRMK Demo Voice Queue, Default Group Voicemail Queue, Default Individual Voicemail Queue, Default voice queue	<b>Active:</b> Billing (Fair), en-US language (Fair), First line support (Very Good), Sales Requests (Excellent), Second line support (Good), sv-SE language (Excellent)	100	CRMK Demo Case Capacity Profile (50), CRMK Demo Chat Capacity Profile (3), CRMK Demo SMS Capacity Profile (5), CRMK Demo Voice Capacity Profile (1), CRMK Demo Voice Outbound Profile (1)	No



# The agent experience



The screenshot displays the Dynamics 365 Customer Service workspace. The top navigation bar includes the Dynamics 365 logo, the text "Customer Service workspace", a search bar, and various utility icons. Below this, a secondary navigation bar shows tabs for "Home", "Inbox", "Biltema AB", and "Support request". The main content area is titled "Omnichannel Ongoing Conversations Dashboard" and features a "Filter by queues" section on the left. This section includes a search bar and a list of queues with checkboxes. Two queues are selected: "CRMK Demo Chat Queue" and "CRMK Demo Voice Queue". The right side of the dashboard is labeled "Conversations" and currently shows a "Loading records..." message. A floating chat window on the right side of the screen displays a "Chat request from Visitor 2" with options to "Accept" or "Reject".

**Dynamics 365** | Customer Service workspace

Search

Home | Inbox | Biltema AB | Support request

D365 Contact Cen... | **Omnichannel Ong...** | Cases All Cases | Search | Queue Items All It...

Save As | New | Set As Default | Refresh All

**Omnichannel Ongoing Conversations Dashboard**

Filter by queues

Search

2 queues selected

- ☐ CRMK Demo Case Queue
- ☒ CRMK Demo Chat Queue
- ☐ CRMK Demo Email Queue
- ☒ CRMK Demo Voice Queue
- ☐ Default Group Voicemail Queue
- ☐ Default Individual Voicemail Queue
- ☐ Default entity queue
- ☐ Default messaging queue
- ☐ Default voice queue

Clear all

Conversations

Monitor | Copy URL

Loading records...

**Chat request from Visitor 2**

Comment | Incoming conversation

Countdown | 120 sec

Accept | Reject

# Copilot in Customer Service



- Summarizes case history to provide real-time insight.
- Realtime and closure **summary** of conversations
- **Generates draft replies** for emails, chat, and messaging channels (incl auto prompts).
- **Suggests relevant KB articles** based on the case or chat.
- Has an '**Ask a Question**' feature for contextual dialogue based on knowledge base



# Copilot in Customer Service

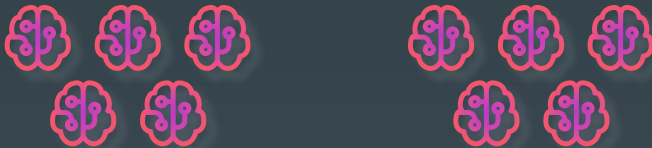


TAKE PHONE CALL, OPEN RELATED CASE; DO CASE SUMMARY, OPEN COPILOT TO ASK QUESTION, FEEDBACK ANSWER TO CUSTOMER IN CONV, CLOSE CONV and COPY SUMMARY TO ADD AS NOTE ON CASE



# Future of Copilot Service

Service Reps + Copilot  
overseeing teams of AI agents



One UI Copilot as primary human assistant overseeing process- and task specific agents working autonomously



# Copilot Agents: as-is



## Prompt and connector plugins

### Prompt Plugin

*Connects to Dataverse entities*

### Custom Connector Plugin

*Connects to external data sources*

### Certified Connector Plugin

*Connects to prebuilt certified connectors*



## Autonomous agents

### Intent Agent

Discovers new intents from case and conversations to create a self-learning loop

### Knowledge Management Agent

Extract knowledge from human assisted cases and draft new knowledge articles to solve future cases via self-service & assisted service

### Case Management Agent

Automate tasks throughout the case lifecycle -- creation, updates, collab, resolution, follow up, & closure -- to reduce handle time and burden on service reps



# Copilot Service



- Maintenance, refinement and accuracy of organizational data
- Effective processes  $\neq$  AI
- Automation as a concept comes in many shapes and sizes
- Over-reliance on AI responses
- Resistance due to replacement
- Data privacy & compliance
- Time, time, time...



# Copilot Service



Your AI assistant for work

**How are businesses using AI to transform and drive impact?**



- Maintenance, refinement and accuracy of organizational data
- Effective processes  $\neq$  AI
- Automation as a concept comes in many shapes and sizes
- Over-reliance on AI responses
- Resistance due to replacement
- Data privacy & compliance
- Time, time, time...



