

AB-250T00: TRANSFORM CONTACT CENTER EXPERIENCES WITH AI IN DYNAMICS 365



DURATION	LEVEL	TECHNOLOGY	DELIVERY METHOD	TRAINING CREDITS
3 Days	Intermediate	Dynamics 365	Instructor-led / VILT	N/A

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.

AUDIENCE PROFILE

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.

PREREQUISITES

- Basic understanding of Dynamics 365 Contact Center concepts and navigation
- Access to Copilot Service admin center with System Administrator role
- Familiarity with Power Platform environments and Dataverse
- Basic understanding of unified routing concepts and workstreams

COURSE OBJECTIVES

After completing this course, students will be able to:

- Implement an AI-powered contact center with Dynamics 365
- Configure channels in Dynamics 365 Contact Center
- Empower customer service representatives in Dynamics 365 Contact Center
- Monitor and optimize Dynamics 365 Contact Center with AI-driven insights

COURSE CONTENT

Module 1: Introduction to implementing Dynamics 365 Contact Center

Get ready to implement Dynamics 365 Contact Center with confidence. Discover what makes this platform AI-first, how its composable architecture replaces fragmented point solutions, and how to match the right deployment model to any customer environment. Walk away knowing how to evaluate cost, navigate

compliance, and make the case for a modern contact center.

Lessons:

- Introduction
- 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
- Knowledge check
- Summary

After completing this module, students will be able to:

- Describe the core capabilities of Dynamics 365 Contact Center
- Explain the platform architecture and deployment models

- Identify key security, governance, and compliance features
- Describe the AI-first capabilities and pre-built agents in Dynamics 365 Contact Center
- Evaluate licensing options and total cost of ownership

Module 2: Configure Dynamics 365 Contact Center core capabilities

A contact center only delivers value when it's properly configured. In this module, you move from a provisioned platform to a fully operational contact center. You learn how to navigate the Copilot Service admin center with confidence, shape the agent workspace to maximize productivity, connect your existing CRM so agents have everything they need in one place, deploy autonomous AI agents through a controlled rollout, configure users with the right roles and capacity, and manage configurations across environments using ALM best practices.

Lessons:

- Introduction
- 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
- Manage users in Dynamics 365 Contact Center
- Configure ALM for Contact Center deployments
- Knowledge check
- Summary

After completing this module, students will be able to:

- Navigate the Copilot Service admin center and use Service Operations Agent for configuration assistance
- Configure the Copilot Service workspace and experience profiles for agent productivity
- Set up the embedded experience and connectors for non-Microsoft CRM integration
- Configure Copilot features and create rollout plans to manage autonomous AI agent adoption
- Configure user accounts, security roles, personas, and capacity profiles
- Apply ALM practices to promote Contact Center configurations across environments

Module 3: Configure queues in Dynamics 365 Contact Center

Design a queue strategy that gets every customer to the right customer service representative fast. Configure queue types, classification rules, overflow handling, and assignment methods to eliminate routing bottlenecks and keep your contact center running at peak efficiency.

Lessons:

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

After completing this module, students will be able to:

- Create and manage messaging, record, and voice queues
- Set up operating hours and overflow handling to manage queue availability and surge conditions
- Configure queue priority and prioritization rulesets to control work item ordering
- Select and configure assignment methods to distribute work to the best-suited CSR (Customer Service Representative)

Module 4: Configure routing in Dynamics 365 Contact Center

Every misrouted call, every customer who repeats their issue to a third customer service representative, every billing question that lands with a technical specialist: these are routing failures. In this module, you build the pipeline that prevents them. You configure workstreams as entry points for each channel, author classification rules that enrich work items before they reach a queue, and implement routing methods—skill-based, intent-based, preferred agent, and record routing—that match customers to the right representative automatically. You finish by connecting Azure Application Insights so you can trace and diagnose any routing decision in production.

Lessons:

- Introduction
- Configure workstreams and work classification rules
- Configure the engagement agent
- Configure routing
- Troubleshoot routing using conversation diagnostics
- Knowledge check
- Summary

After completing this module, students will be able to:

- Configure workstreams and work classification rules to enrich and categorize incoming work items before assignment
- Connect a Copilot Studio engagement agent to a workstream to enable self-service and collect customer context before routing to a customer service representative
- Implement skill-based routing, intent-based routing, and preferred agent routing to match customers to the most qualified available customer service representative
- Configure record routing to process Dataverse records through the unified routing engine
- Use Azure Application Insights and conversation diagnostics to trace and troubleshoot routing decisions

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

Today's customers expect to reach organizations on the channels they already use — WhatsApp, SMS, web chat, or a proprietary in-app platform. In this module, you configure these channels in Dynamics 365 Contact Center. You set up WhatsApp and SMS channels, build and customize a live chat widget with pre-chat surveys and custom context passing, extend the chat experience using the Live Chat SDK and mobile SDKs, and create a fully custom channel through the Messaging API. Every channel feeds into the same unified routing engine, giving your team a single workspace to handle every conversation.

Lessons:

- Introduction
- Overview of channels
- Configure digital channels
- Configure the chat channel
- Configure advanced settings for the chat channel
- Configure a custom channel
- Knowledge check
- Summary

After completing this module, you will be able to:

- Identify available channel types and the common provisioning pattern for enabling channels
- Configure digital messaging channels including WhatsApp and SMS
- Configure and embed the live chat widget with pre-chat

- surveys and custom context passing
- Extend the chat experience using the Live Chat SDK, authentication, and mobile SDKs
- Configure a custom messaging channel using the Messaging API

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

Voice is still the channel customers reach for when the stakes are high—a billing dispute, a service outage, a problem they couldn't solve any other way. In this module, you build the voice channel from the ground up. You connect Teams Phone to Dynamics 365 Contact Center, configure workstreams and queues that route every call to the right representative, set up inbound and outbound calling profiles, integrate an external IVR system, and use analytics and conversation intelligence to turn call data into coaching opportunities.

Lessons

- Introduction
- 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
- Knowledge check
- Summary

After completing this module, you will be able to:

- Provision Teams Phone for the voice channel, create resource accounts, and choose a PSTN connectivity option
- Configure voice workstreams with recording, transcription, real-time translation, transfer settings, and routing rules
- Create voice queues with assignment rules and overflow handling
- Set up outbound and inbound calling profiles and assign personal phone numbers to service representatives
- Integrate a non-Microsoft IVR system with the voice channel using Teams Direct Routing
- Use voice analytics dashboards, conversation intelligence, and real-time monitoring tools

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

After the initial setup of channels and routing, a well-configured

contact center requires fine-tuning to run efficiently. In this module, you configure the advanced settings that control how conversations behave, how representatives interact with customers, and how your organization collects and acts on feedback. You also learn how to extend Dynamics 365 with third-party telephony through the Channel Integration Framework.

Lessons

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

After completing this module, you will be able to:

- Configure automatic conversation closure, consult and transfer settings, context variables, custom presences, and automatic customer identification
- Create message templates, automated messages, and configure sensitive data masking
- Configure the timeline control and extend it with custom connectors
- Describe the Channel Integration Framework architecture and identify when to use it for third-party telephony integration
- Configure customer feedback surveys using Copilot Studio for voice and digital channels

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

Voice agents can resolve issues before a representative is needed — and when escalation is required, hand off with full context so customers never have to repeat themselves. In this module, you learn to choose the right orchestration model, customize agent behavior with variables and SIP headers, support customers in multiple languages, and configure call recording that meets legal requirements.

Lessons

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

- Security and compliance for voice agents
- Knowledge check
- Summary

After completing this module, you will be able to:

- Compare classic orchestration and generative AI orchestration, and select the appropriate model for a given voice agent scenario.
- Manage variables and configure SIP UII headers to pass context data to representatives and external systems.
- Configure DTMF input patterns, speech recognition timeouts, and external speech grammars for voice agents.
- Deploy a single multilingual voice agent supporting multiple languages in a voice workstream.
- Configure call recording and transcription settings that comply with legal consent requirements and data handling best practices.

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

Understaffing leads to long wait times, while overstaffing drives up costs. Workforce management in Dynamics 365 Contact Center helps you strike the right balance by forecasting demand, building data-driven schedules, and monitoring adherence in real time — so your team is always the right size at the right time.

Lessons

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

After completing this module, you will be able to:

- Identify the functional areas of workforce management and set up user management prerequisites.
- Configure volume forecasting, AI-based forecasting, and capacity planning to predict demand.
- Create shift plans, schedule representatives, and publish schedules.
- Integrate third-party workforce management solutions through the Dataverse API.

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

Use experience profiles to customize the Copilot Service workspace for different service representative roles. Configure productivity pane tools, Copilot AI features, application tab templates, session templates, notification templates, and the inbox to give each team a workspace that matches how they work.

Lessons

- Introduction
- Create and configure experience profiles
- Configure templates for sessions and notifications
- Configure the inbox for service representatives
- Knowledge check
- Summary

After completing this module, you will be able to:

- Create and configure experience profiles to control workspace features per representative role.
- Enable and configure Copilot features at the experience profile level.
- Create application tab, session, and notification templates to control the workspace experience during conversations.
- Configure the inbox and custom views for service representatives.

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

Configure the productivity pane tools that help service representatives work faster and more consistently. Set up scripts and macros that guide representatives through conversations and automate repetitive tasks, add custom Power Apps tools to the productivity pane, enable embedded Microsoft Teams collaboration, and extend the workspace with JavaScript APIs.

Lessons

- Introduction
- Configure scripts and macros
- Enable custom productivity panels
- Enable Teams collaboration
- Extend productivity tools
- Knowledge check
- Summary

After completing this module, you will be able to:

- Create scripts with step-by-step guidance and use slugs to surface dynamic session context.

- Build macros using productivity automation, session connector, Omnichannel connector, and flow connector actions.
- Configure a custom Power Apps page or PCF control as a productivity pane tool and enable it in an experience profile.
- Enable embedded Microsoft Teams chat, connect chats to Dynamics 365 records, and configure chat disconnect permissions.
- Use the App profile manager JavaScript API to manage sessions, tabs, and session context programmatically.
- Use the Omnichannel JavaScript API to retrieve conversation data and link records to conversations.

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

A well-configured knowledge base helps agents resolve issues faster, deliver consistent answers, and spend less time searching. This module covers knowledge management configuration in Dynamics 365 Customer Service and Contact Center — from setting up the authoring environment through to extending the knowledge base with external content sources.

Lessons

- Introduction
- 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
- Summary

After completing this module, you will be able to:

- Describe the knowledge management process and configure knowledge management settings and portal integration
- Author and publish knowledge articles using Copilot assistance
- Configure the Customer Knowledge Management Agent to automate article drafting from resolved cases
- Manage article versions, categories, and translations

- Configure internal knowledge search settings for agents in Copilot Service workspace
- Integrate external knowledge sources using external and integrated search providers

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

Your contact center has more conversations to manage, more quality to maintain, and more configuration to get right than any team can handle manually. In this module, you configure the three AI agents in Dynamics 365 Contact Center — Customer Assist, Quality Assurance, and Service Operations — and set up the Copilot features your service representatives rely on in every conversation. You connect knowledge sources, add filters, extend Copilot with plugins, and use analytics to keep the whole system improving.

Lessons

- Introduction
- Understand the AI landscape in Dynamics 365 Contact Center
- 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
- Knowledge check
- Summary

After completing this module, you will be able to:

- Describe the AI and Copilot capabilities in Dynamics 365 Contact Center and how they work together
- Configure the Customer Assist Agent for autonomous self-service, real-time representative assistance, and proactive customer engagement
- Configure the Quality Assurance Agent to evaluate conversations in real time and after completion, and enable supervisor monitoring
- Configure the Service Operations Agent for conversational setup and AI-powered conversation orchestration with playbooks
- Configure Copilot features including conversation summaries, the help pane, and knowledge sources
- Extend Copilot with prompt and connector plugins to surface data from external systems

- Use the Copilot analytics report to measure and improve Copilot adoption

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

Supervisors can only improve what they can see and act on. This module gives you the skills to build a fully operational supervisor experience in Dynamics 365 Contact Center: one where supervisors can intervene in live conversations, review quality automatically through AI evaluation, and access the analytics that drive smarter decisions. By the end, your contact center has the oversight, consistency, and data access it needs to deliver better outcomes for customers and representatives alike.

Lessons

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

After completing this module, you will be able to:

- Enable supervisor permission toggles to allow monitoring, assigning, transferring, and force-closing conversations.
- Use the Omnichannel real-time analytics dashboard to monitor and take action on live conversations.
- Configure screen recording for representatives using experience profiles and the desktop companion application.
- Create custom security roles to grant user access to

specific analytics and reporting dashboards.

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

Configure proactive engagement in Dynamics 365 Contact Center to initiate outbound voice calls and SMS messages. Set up outbound workstreams for voice and SMS, choose engagement types (AI-led or representative-led) and dialing modes, configure proactive campaigns with audience sourcing, routing, outcomes, reattempts, and frequency limits, and monitor campaign performance with the proactive engagement dashboard.

Lessons

- Introduction
- Set up proactive engagement
- Configure proactive campaigns
- Set up the proactive engagement dashboard
- Knowledge check
- Summary

After completing this module, you will be able to:

- Describe proactive engagement and identify scenarios where outbound voice and SMS campaigns add value
- Set up outbound workstreams for voice and SMS channels, and select the appropriate engagement type and dialing mode
- Configure proactive engagement campaigns with audience sourcing, routing, outcomes, reattempt logic, and frequency limits
- Enable and use the proactive engagement dashboard to monitor delivery metrics and optimize campaigns

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

Explore the analytics and reporting framework in Dynamics 365 Contact Center. Use out-of-the-box historical and real-time dashboards, personalize reports with filters and bookmarks, extend data models with Power BI and Microsoft Fabric, and configure Azure Application Insights to capture and query conversation lifecycle telemetry.

Lessons

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

After completing this module, you will be able to:

- Describe the out-of-the-box historical and real-time analytics dashboards available in Copilot Service workspace.
- Configure report state retention and personalize dashboards using filters, bookmarks, and the embedded Power BI editor.
- Complete the prerequisites and four-step process for Power BI data model customization to extend analytics with custom metrics and data sources.
- Embed customized Power BI reports back into Copilot Service workspace and configure automatic page refresh for real-time reports.
- Set up conversation diagnostics in Azure Application Insights and query conversation lifecycle events using KQL.

ASSOCIATED CERTIFICATIONS & EXAM

This course helps prepare you for the AB-250 Exam - the Microsoft Certified: Dynamics 365 Contact Center AI Engineer Associate certification.