



# Microsoft Dynamics 365

Customer Service - Omnichannel



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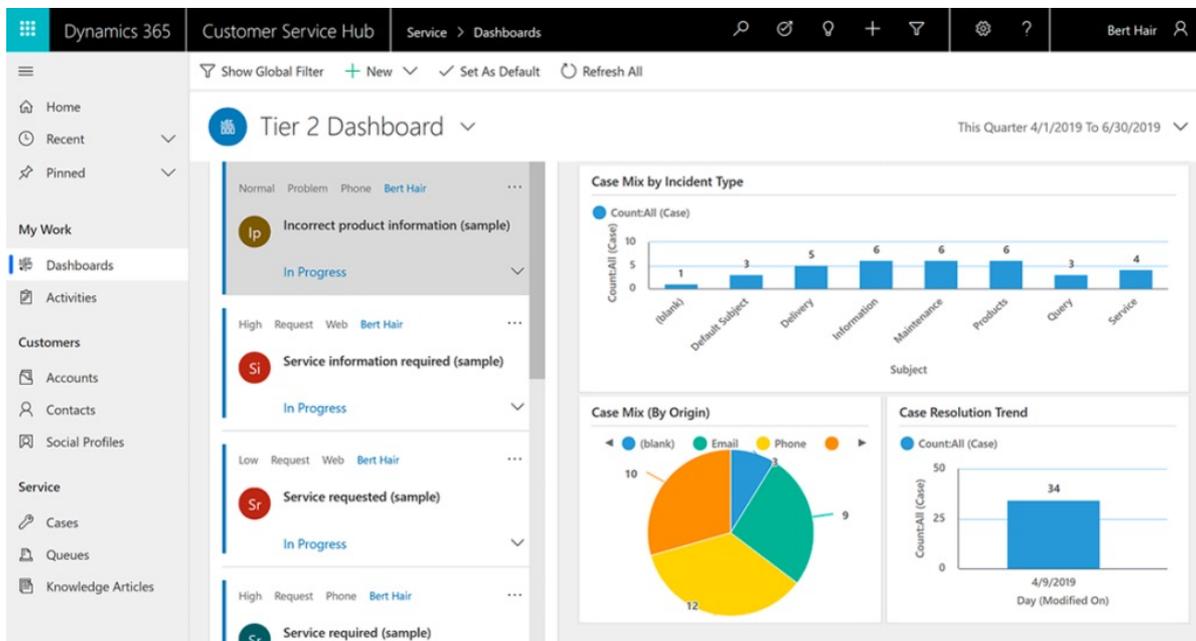


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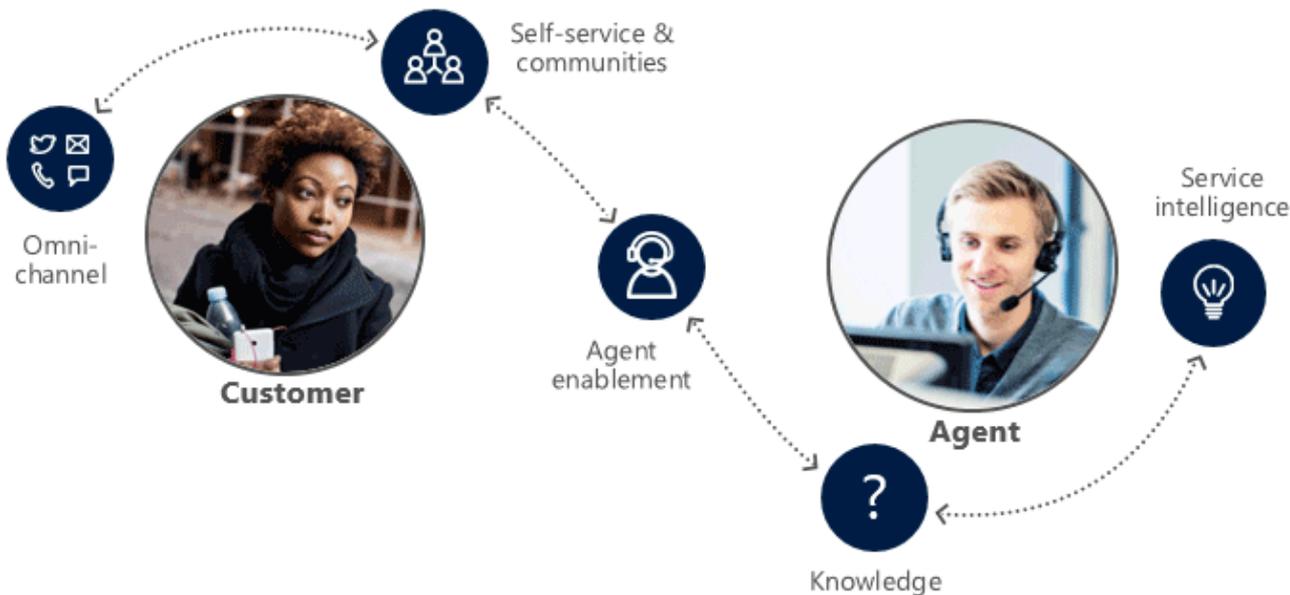
# Visão MS Omnichannel

# 1 Visão MS Omnichannel

- Conjunto de recursos para ampliar o poder do D365 Customer Service.



# 1 Visão MS Omnichannel

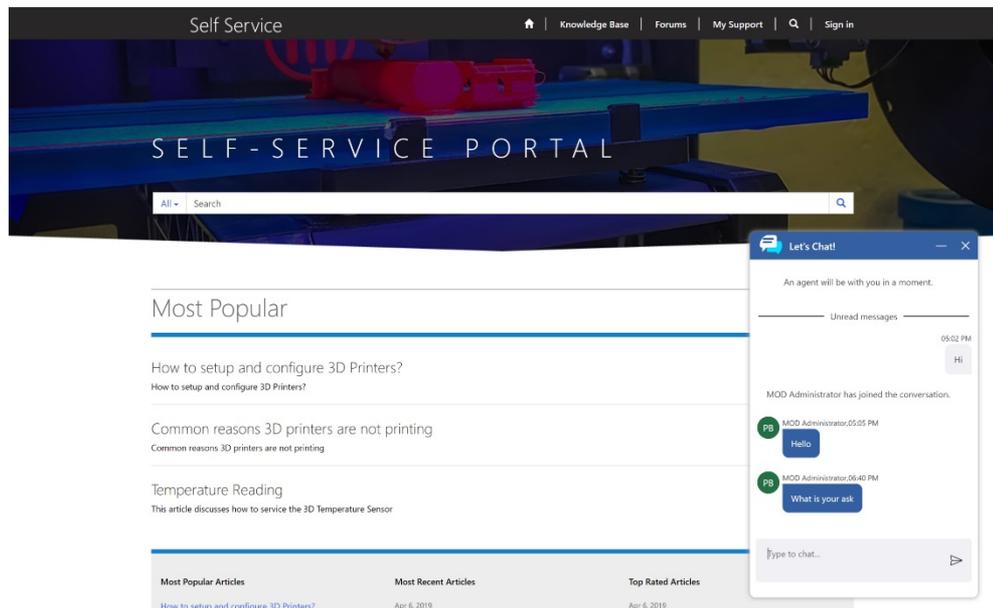


# 1 Visão MS Omnichannel

- Maior interação com o cliente por meio de canais digitais, como chat e sms;

- Personalizável;

- Aumento da produtividade.



1

# Jornada de atendimento

## Identificação

O cliente/usuário pode realizar o processo de identificação de dados e melhor fluxo de atendimento através de uma pesquisa inicial.

## Autoatendimento via chat bot

Através da etapa de chat bot, o cliente/usuário pode realizar o autoatendimento e sanar as dúvidas, obter informações ou abrir chamados sem interagir com um agente humano.

## Transferência para um agente

Caso necessário, é possível transferir para um agente humano, ao qual obterá todo o histórico de conversa com o chat, acesso aos seus chamados, base de conhecimento, script de atendimento, filas, escalação de suporte, entre outras funcionalidades.



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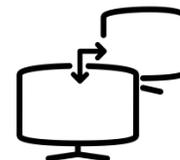
# Demonstração com PVA e Portals



3

# Configurações e possibilidades

- Chat próprio;
- SMS;
- MS Teams;
- Facebook, WhatsApp, Chat Bot, entre outros.



## Live Chat

Chat Widget

3/25/2020 12:02 PM  
Created On

Clay Roddy  
Owner

**Basic details** Design Pre-chat survey Location Conversation options Custom messages Related

### General information

Name \* **Live Chat**

Language \*  **English - United States**

Agent display name **Full name**

Authentication settings ---

### File attachments

Enable file attachments for customers **No**

Enable file attachments for agents **Yes**

### Customer waiting

These options will be visible to a customer when waiting for an agent.

Show position in queue **No**

Show average wait time **Yes**

### Work distribution

 Work stream \*  **Live chat workstream**

### Proactive chat

Enable Proactive Chat \* **No**

### Chat Transcripts

ⓘ By enabling this feature, you acknowledge that your data may flow outside your organization's compliance and geo boundaries. This includes Government Cloud environments. Learn more [here](#) and in the [Microsoft Privacy Statement](#)

Allow download of transcript \* **No**

Allow email of transcript \* **No**

### Code snippet

A widget snippet `<script>`

**Live Chat**  
Chat Widget

3/25/2020 12:02 PM  
Created On Clay Roddy  
Owner

Basic details **Design** Pre-chat survey Location Conversation options Custom messages Related

### Online

Theme color \* **Blue**

Logo \* <https://oc-cdn-ocprod.azureedge.net/livechatwidget/images/chat.svg>

Title \*

Subtitle **We're Online**

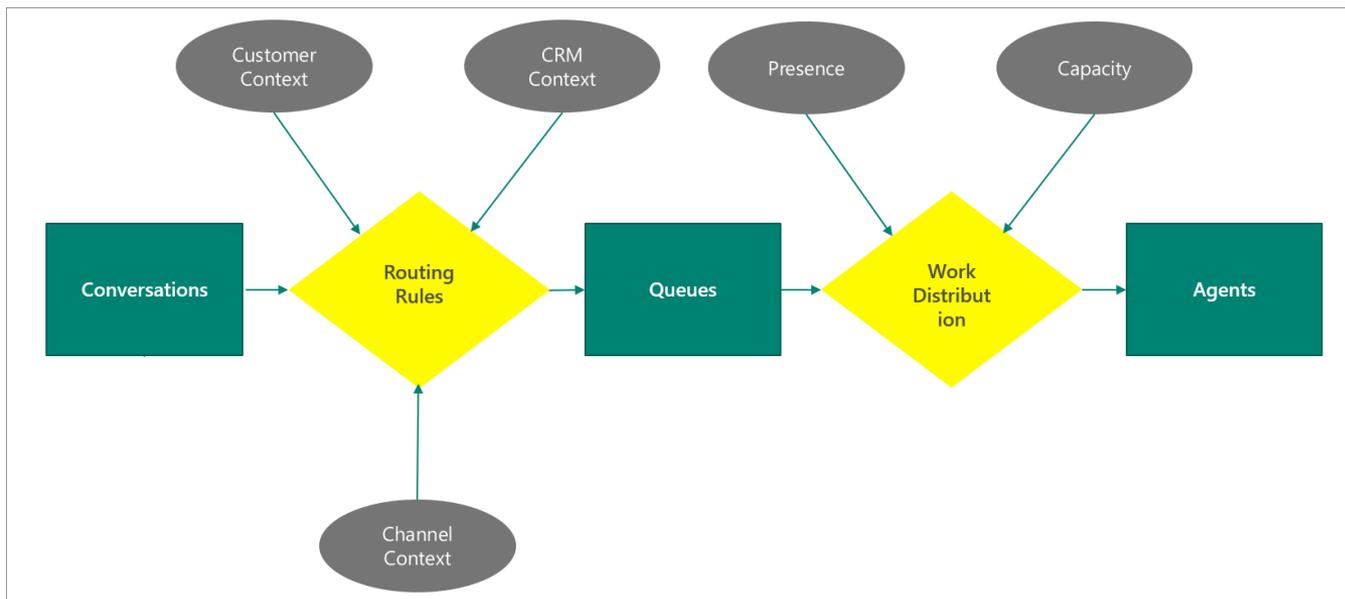
 Position \* **Bottom right**

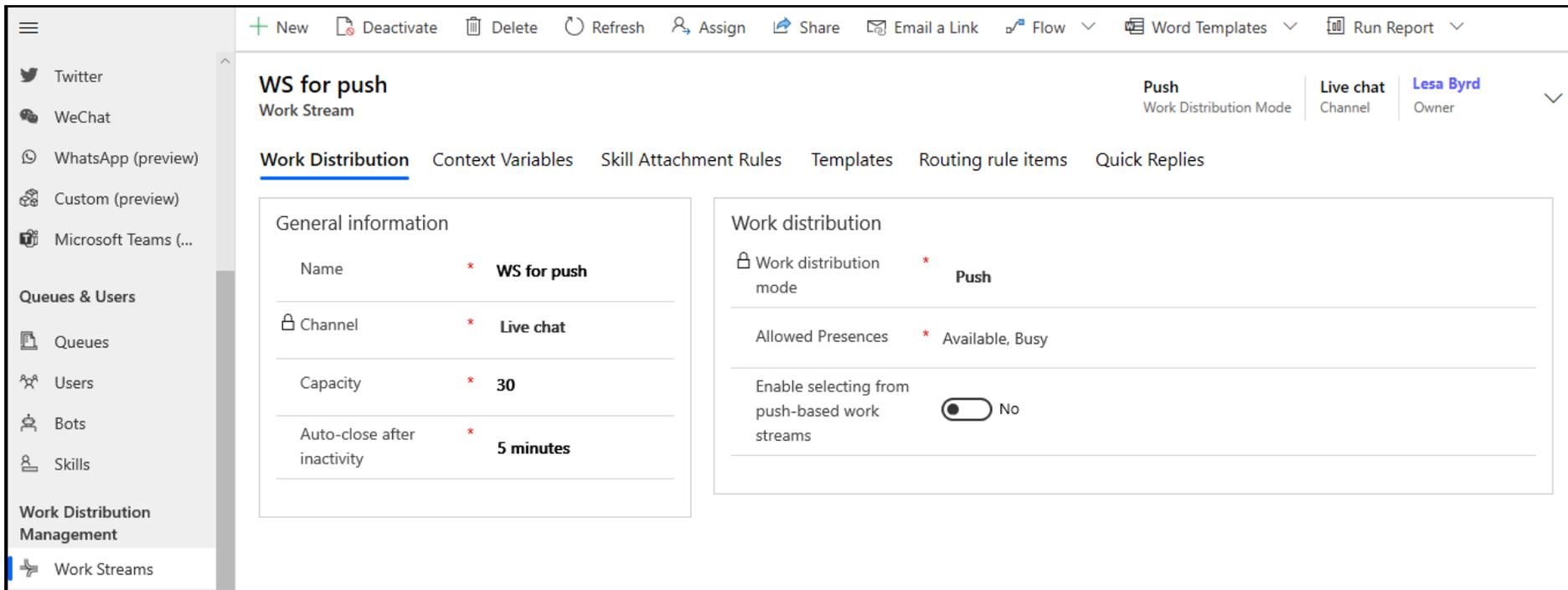
Operating hours ---

- Direitos de acesso;
  - D365 CS;
  - Perfis Omnicanal (admin, agente, supervisor);
  - Ferramentas de produtividade.
  
- Filas conforme D365 CS.

# 3 Roteamento e distribuição

- Garantir que as conversas de todos os canais sejam roteadas de forma eficiente!





The screenshot displays the Bizapp configuration interface for a Work Stream. The left sidebar shows navigation options: Queues & Users (Queues, Users, Bots, Skills) and Work Distribution Management (Work Streams). The main content area is titled 'WS for push' and includes a toolbar with actions like New, Deactivate, Delete, Refresh, Assign, Share, Email a Link, Flow, Word Templates, and Run Report. The configuration is divided into two panels: 'General information' and 'Work distribution'.

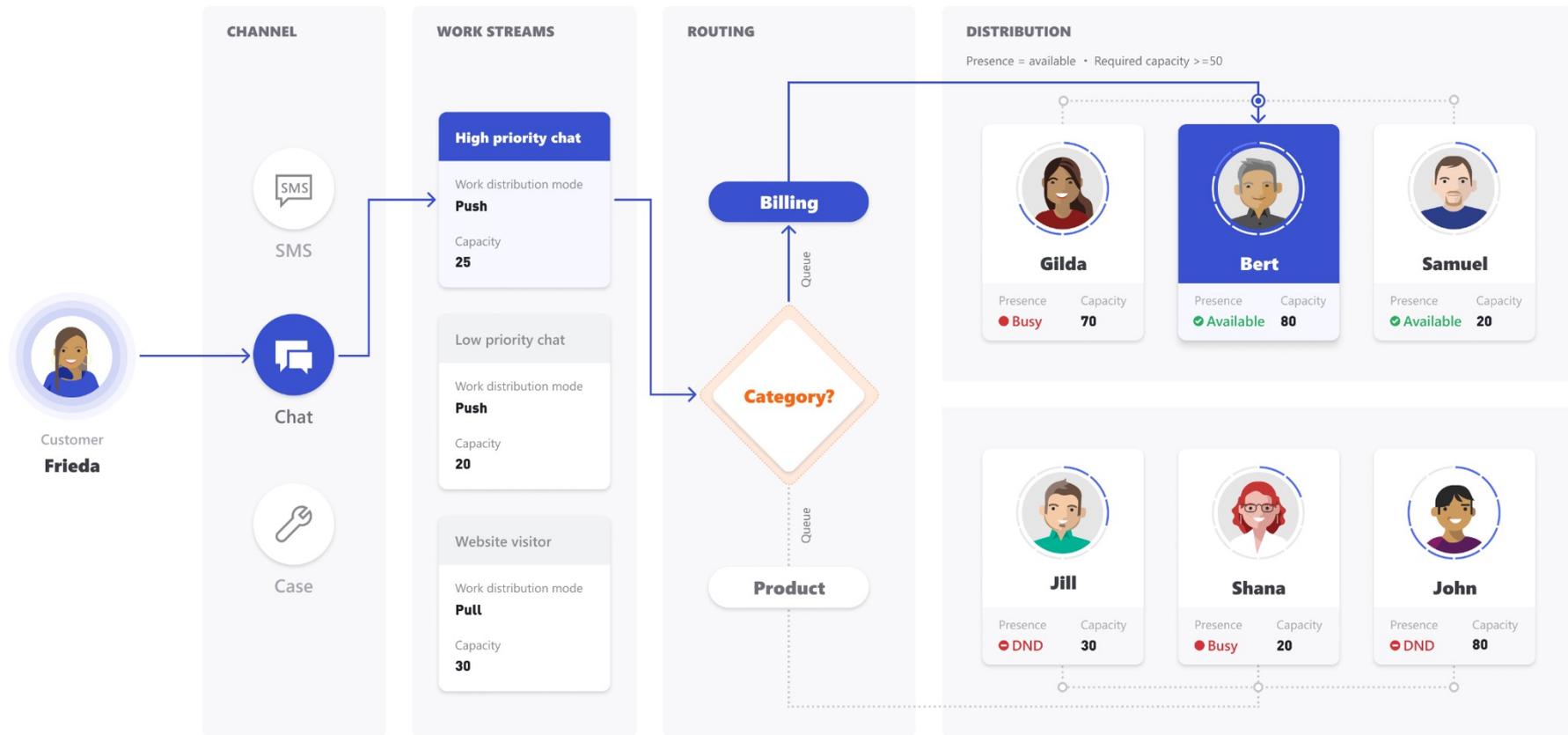
**General information**

Name	*	<b>WS for push</b>
Channel	*	<b>Live chat</b>
Capacity	*	<b>30</b>
Auto-close after inactivity	*	<b>5 minutes</b>

**Work distribution**

Work distribution mode	*	<b>Push</b>
Allowed Presences	*	Available, Busy
Enable selecting from push-based work streams		<input type="checkbox"/> No

# 3 Roteamento e distribuição



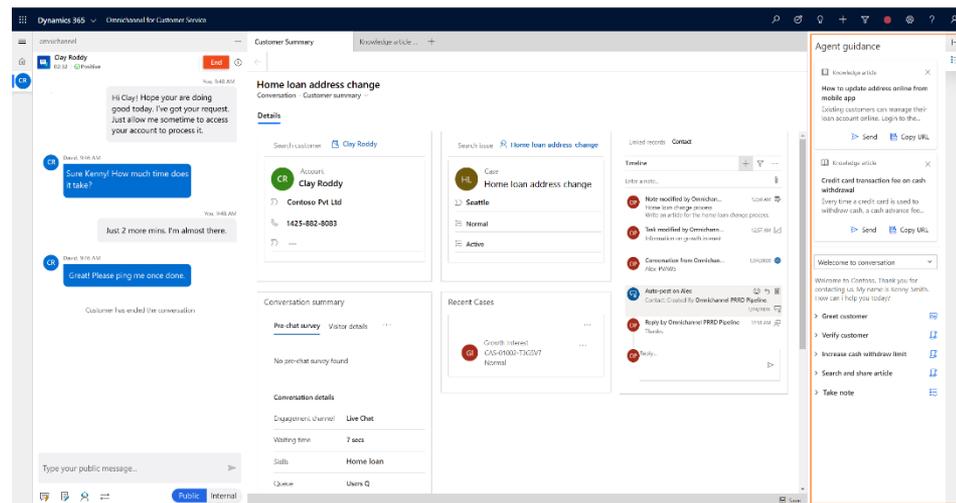


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# Experiências do usuário

# 4 Agente

- Desafios do Agente;
- Ferramentas de produtividade;
  - Macros;
  - Scripts de Atendimento;
  - Assistência Inteligente.



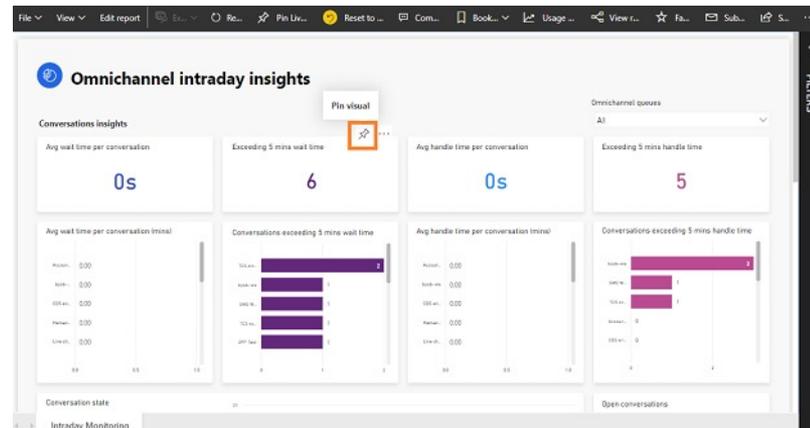
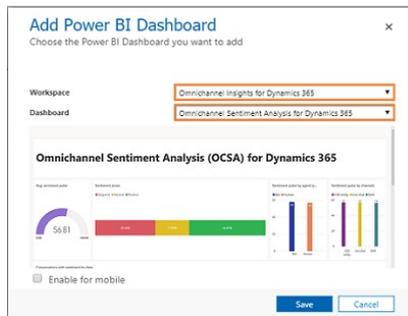
- Desafios do Supervisor;

- Insights;

- KPIs;

- Análise de Sentimento;

- Painel de Conversas.



Customer	Queue	Channel	State	Customer sentiment	Created On	Work stream	Active Agent
Chris Jones	Xbox	SMS	Open	Neutral	9/17/2019...	Chat Survey	Diego Nathan
Jessica Stanton	Office	Chat, Vide...	Open	Very negative	9/17/2019...	Chat Survey	Lisa Johnson
Jazzinder Mad	Surface	SMS	Wrap-up	N/A	9/17/2019...	Chat Survey	Dan Son
Jason Day	Xbox Games	Chat	Waiting	Neutral	9/17/2019...	Chat Survey	Dan Son
Brian Mason	Xbox Games	Chat	Wrap-up	Neutral	9/17/2019...	Chat Survey	David Serpis
Maxwell Red	OneNote Tier 2	Telegram	Open	Neutral	9/17/2019...	Chat Survey	Lisa Johnson
Jimmy Franks	Xbox	Chat	Open	Slightly negative	9/17/2019...	Chat Survey	David Serpis
Cora Camp	Xbox Games	Chat, Voice	Wrap-up	Neutral	9/17/2019...	Chat Survey	Dan Son
Ashley Lighter	Office	Facebook	Wrap-up	Positive	9/17/2019...	Chat Survey	Dan Son



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# Próximos Passos

# 4 Integração com chat bot

- Power Virtual Agents



The screenshot displays the Power Virtual Agents interface. On the left, a 'Test bot' window shows a chat conversation with a user named 'Kirkland'. The chat history includes messages such as 'If you'd like to speak to a human agent, let me know at any time.', 'So, what can I help you with today?', 'Are there any stores around me?', 'I'd be glad to help find a store near you.', 'Which location are you interested in?', and 'Our Kirkland is located in downtown Kirkland. The address is 2234 Central Way, Kirkland, WA 98221.' Below the chat is a 'Type your message' input field.

The main area shows the 'End of Conversation' flowchart. It features a 'Trigger Phrases' section with a plus sign, a 'Question' section with 'Ask a question' and 'Did that answer your question?' fields, and an 'Identify' section with a 'Boolean' dropdown. Below these are two 'Condition' blocks, each containing a 'PRR Survey Question (Boolean)' and a 'True/False' dropdown. The flowchart branches into two paths, each leading to a 'Redirect' action, with 'Confirmed Success' and 'Confirmed Failure' labels at the bottom.

The screenshot shows a chat request interface. At the top, a dark blue header contains navigation icons. Below it, a dark blue box displays 'Chat request from Visitor 2' with a comment 'Escalated from bot' and a wait time of '101 sec'. There are 'Accept' and 'Reject' buttons.

Below the request box, a section titled 'Closed work items' shows a list of items. The first item is '<Joe Unwin> Sarah Critchley Live chat workstream' with a dropdown arrow. The second item is 'A Datum Corporation: Live chat workstream' with a red 'AD' icon, 'A Datum Corporation', '4/24/2020 1:14 AM', and 'Closed' status.

- Integração com serviços de telefonia;
- Auditoria (gravação) de sessões (incluindo áudio e vídeo);
- Sincronização de status do agente com o MS Teams;
- Entra outras ideias em revisão e análise.



Dúvidas