Unified Service Desk (USD) for Dynamics 365

Course Level: 200

This course provides technical resources a deep dive into USD. USD allows advanced applications to be created that manage the agent desktop experience for Dynamics 365. It adds the ability to organize windows into Sessions to keep multiple customer interactions separated to improve data quality and agent manageability, create completely customized user experiences - including toolbars, agent scripting, overview information, alerts, and menus. This is all done using configuration through Dynamics 365 which auto-populates complete Dynamics 365 forms with data from other tabs or applications. It also includes a powerful rules engine for routing Dynamics 365 popup windows to specific tabs and controlling behavior of the user experience.

DYNAMICS 365 UNIVERSITY

At A Glance:
USD Training for Dynamics 365

Why Enroll?

Empower technical architects, developers, and admins to create a unified platform for users.

Who to Enroll?

System Administrators - Technical Architects - Developers -

Key Takeaways

Installation and Deployment, Administration Best Practices, Configuration and Customization, CIT Framework and Architecture, Debugger and Troubleshooting

Register

Register for a USD Training today!

Click to Register.

POWER OBJECTS
An HCL Technologies Company

DYNAMICS 365 UNIVERSITY

About this
Training

Intended Audience

This course is intended for technical architects, developers, and administrators with .NET experience and CRM for Dynamics 365 administrative experience. Not recommended for end users.

Recommended Prerequisites

Prerequisites are recommendations, and while not required, they are *highly* advised to ensure a successful learning experience:
- Understanding of data or relational databases is helpful
- Dynamics 365 University: CRM Boot Camp for Dynamics 365

Key
Takeaways

This Training Will Teach You:

- Introduction and Overview
- Installation
- Actions, Action calls and Events
- Toolbars and Window Navigation rules
- Logging and Debugging
- Scriptlets and Session Management
- Using CRM data and entity searches
- Agent Scripts
- Templates, Styling, and Translation
- CTI Framework
- CCA Migration
- Hosting External Applications
- Troubleshooting Microsoft Dynamics
- 365 Processes

POWER OBJECTS
An HCL Technologies Company

| DAY 1 | DAY 2 | DAY 3 | DAY 4 | DAY 5 |

INTRODUCTIONS

Introduction to USD
- Intro to Contact Centers
- Benefits of USD
- USD Architecture Overview
- Why USD – Business Case for Using USD
- CSH and KM Overview

INSTALLATION

Installation
- Client Requirements
- Best Practices

Package Deployer
- Steps
- Options

CONFIGURATION & DEBUGGER

Configuration
- USD Agent Desktop/Components
- Hosted Controls
- Action Calls
- Toolbars
- Window Navigation Rules
- Events
- Options

Debugger
Configuration Essentials
- Replacement Parameters

POWER OBJECTS
An HCL Technologies Company

DYNAMICS 365 UNIVERSITY

DAY 1 | **DAY 2** | DAY 3 | DAY 4 | DAY 5

CONFIGURATION (CONT.)

ADVANCED CONFIGURATION

Configuration Essentials (Cont.)
- Scriptlets
- Using CRM Data
- Entity Searches
- Session Management
- Session Lines
- Scripting
- User Settings
- Configuration Files

Advanced Configuration
- Templates
- Translation
- Caching
- Themes

POWER OBJECTS
An HCL Technologies Company

DYNAMICS 365 UNIVERSITY

CUSTOMIZATION

Customizing the Desktop
• Custom Styling
USD Hosted Controls
Panels and Layouts
• Business Units

CTI FRAMEWORK

CTI Framework
CTI Architecture
Generic Listener
Custom CTI Adapters

TROUBLESHOOTING

Troubleshooting
Scenarios
Overview of Additional Labs/Resources
Final Q&A and Wrap Up

DYNAMICS 365 UNIVERSITY

Dynamics 365 University is designed to be foundational training for those responsible for implementing and supporting Dynamics 365 within your organization. Dynamics 365 University focuses on out-of-the-box features and functionality training for your core team. Participants get an understanding of how the Dynamics 365 processes and architecture can be leveraged and customized to support your unique organizational processes.

GET STARTED