

Key Features of Microsoft Dynamics 365

Customer Service

One of the most powerful yet often ignored features of Microsoft Dynamics 365 is Customer Service.

Customer Service allows you to increase customer satisfaction while reducing the amount of time and money spent on each support case or service call.

Dynamics 365 empowers your team to:

- Set up cases
- Record all interactions related to a case
- Create queues to route cases to the right channel
- Share information in a knowledge base
- Define service terms through Entitlements
- Create and schedule services
- Manage performance and productivity through reports and dashboards

Key Features of Dynamics 365 Customer Service

Customer service is broken down into two sections.

Service Management - designed to support incident-based service called Cases.

- Cases/Incidents
- Queues
- Entitlements
- Knowledge Base
- Articles
- SLA

Service Scheduling - helps organizations to track service scheduling, manage different service types and the resources needed to complete the job.

- Service Calendar
- Service Scheduler

Key features of Service Management

You can use Service management to establish service agreements and subscriptions, handle customer inquiries and service orders. You can also manage and analyze how services are delivered to your customers.

What is a Queue?

- A Queue is simply a list of “work items” including cases, activities, or other entity types.
- Queues are a place to organize and store “jobs” waiting to be processed.
- Queues allow you to set of distinct entity records, such as cases with the ability to claim or work on the queue item. It also allows users to know who is working on what.

What is Entitlement?

- Entitlements specify the support term based on a number of hours or number of cases. The customer’s support level can vary based on the product or the service purchased.
- Customers who purchased different products can be entitled to different support.

Case Management in Dynamics 365

- The case entity provides Incident-based tracking for customer issues.
- When a customer service representative creates an incident (case) to track a customer request, question or a problem, all actions and communications can be tracked in the incident entity.
- An incident can be in one of the three states of Active, Resolved or Cancelled

Service Level Agreement(SLA)

- Service Level Agreement (SLA) offer an easy way to track the time it takes your

service representatives to solve support requests.

- SLA allow users to pause the timer depending on the status reason of the support

request. For example: if a service representative is waiting on certain information from the customer, the status reason “waiting on customer” will pause the timer until the status reason changes.

Standard Dynamics 365 Articles

- Dynamics 365 offers users the ability to generate articles which contain knowledge base information that may be surfaced within various records.
- These articles are stored directly within the Dynamics 365 and are based on templates that are set-up within the services administration area.
- Articles may be created and access by users with the correct user roles and permissions.

Key Features of Service Scheduling

Using Scheduling you can plan and schedule service activities for your customers by bringing together all your resources.

Service Scheduling

- The Service scheduler enables you to set up rules that will help you schedule services more efficiently.
- Instead of listing individual people, you are able to group people with similar skills into resource groups which are treated as pools.
- Once the service activity is scheduled, it appears on the service calendar.
- Users that are being assigned services can look at their calendar and see what they have to do on a specific day.

Service Calendar

- Service Calendar is in Service Scheduling
- All the Scheduled Service activities appeared in the Service Calendar.
- The Service Calendar is separate from the other CRM Calendar.

Entities That Belong to Service Scheduling

- Resources: includes people, locations or equipment required for a specific service.
- Resource Group: association of resources with the same skill sets.
- Work hours: allows you to set up the availability of the user.
- Services: services that you offer to your clients that require one or more resources.

Although it can take extra resources, time and money, good customer service is directly related to the growth of your business. Microsoft Dynamics 365 makes this easier for you.

Case Management in Microsoft Dynamics 365 for Customer Service

Microsoft Dynamics 365 for Customer Service is a powerful system to unify the way people experience your business. It makes information available across engagements so your agents can offer the consistency and personalization your customers expect (and require).

Case Management Overview

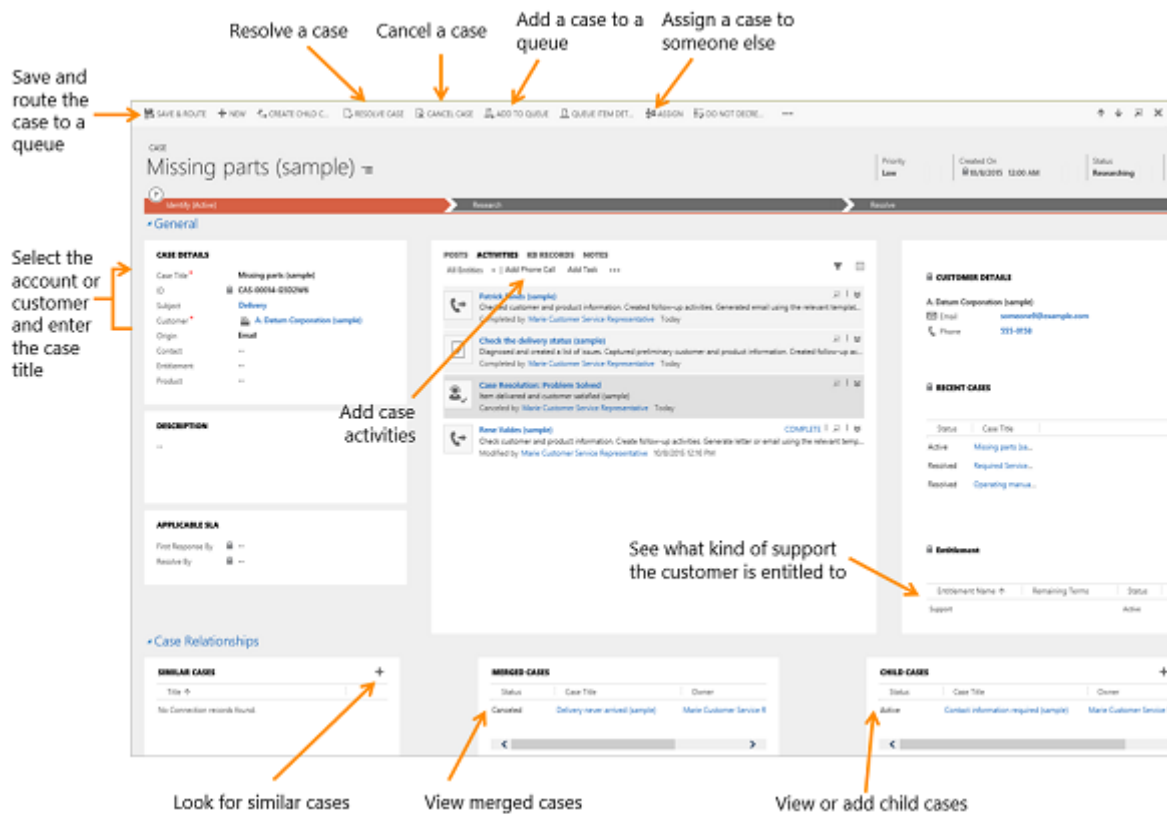
Microsoft Dynamics 365 Service Management is designed to support incident based services called **Cases**.

- The Case Entity provides incident based tracking for issues that may arise from customers, whether they are external or internal.
- A customer service representative creates an incident (case) to track a customer request, question or a problem.
- All actions and communications can be tracked in the incident entity. An incident can be in one of the three states Active, Resolved or Cancelled.

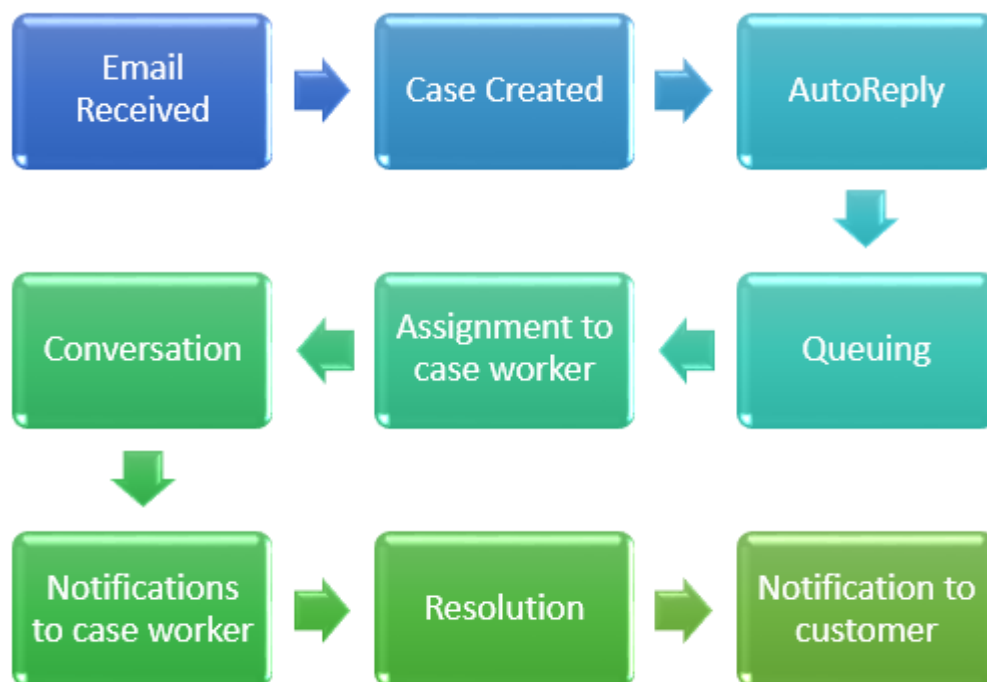
Microsoft Dynamics 365 Cases are commonly used in help desk scenarios, where a customer has an issue with a product or service. Then the activities to resolve the issue can be tracked in an organized way from when the issue was first reported to resolution of the issue.

- Keep track of the customer requests and issues by creating support cases in Dynamics 365.
- When a customer contacts support with a question or problem, it can be quickly verified if there is an existing case or open a new case and start tracking the issue.
- The cases can also be escalated, reassigned, or put a case back into the service queue if enough information is not available or due to time constraints.
- Before providing support, Customer's entitlements can also be verified.
- Entitlements are like contracts that illustrates about the type of support a customer is eligible for.
- Verification of Customer Contract information
 - Support terms are based on number of hours or cases,
 - Support channel, or based on the product or service that the customer has purchased.
- To help you select the right status of a case, your admin may have set things up so that you only see a limited set of status based on the current status of a case.

Case Form Layout



Typical Flow of Case Management



- System receives an email regarding any issue.

- Cases will be automatically created from email messages.
- Send automatic email response to the Customer for the ticket creation.
- This ticket will be routed to the Support queue.
- The ticket will then be assigned to specific CSR based on the routing rules set in the CRM system.
- CSR will make further communications with customer.
- CSR will resolve the case and notification will be send to the customer for the case resolution.

Successful companies can use Microsoft Dynamics 365 for Customer Service to:

- Track customer issues through cases.
- Record all interactions related to a case.
- Share information in the knowledge base.
- Create queues, and route cases to the right channels.
- Create and track service levels through service level agreements (SLAs).
- Define service terms through entitlements.
- Manage performance and productivity through reports and dashboards.
- Create and schedule services.