Assignment – 3

Dynamics 365 Customer Service

Why we are using customer service hub?

As an organization, when we made a sale of our product or the service to the people or other businesses then the challenge becomes how you help those customers with various issues and keep them happy. This helps in free advertising through word of mouth and recommendations.

Exploring the Dynamics 365 for Customer Service app

- **Dynamics 365 customer service**

This works with the support team in dealing with issues that arise from the customer's challenges and challenge can be anything like product or service issue, lack of understanding, various inquiries or may be anything about product or service.

In this various entities overlap within sales module such as accounts, contacts and activities. This allows a single data point and no need to keep data synchronized across multiple application profiles.

- **Service area**

This service area includes all functionality needed for a customer service or their manager to handle customer issues. A service is a work performed for a customer. It includes :

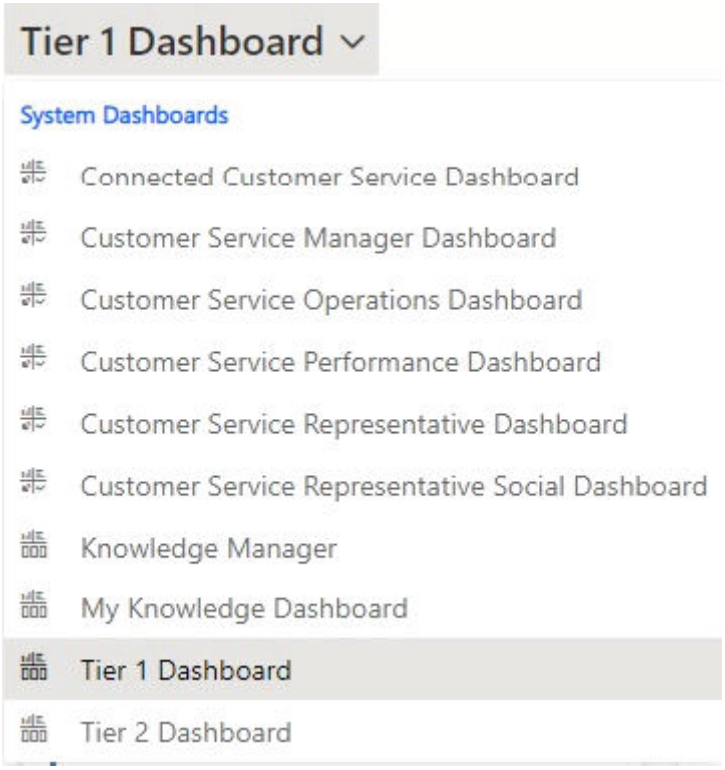
-> Service duration

-> Define resources required

-> Define site required

-> Used by service scheduling engine

The main interface starts at dashboards, as there are 8 dashboards avialable i.e.



- **Scheduling area**

Scheduling allows us to schedule resources for customer centric activities. This area focuses on the allocation of resources, facilities and equipment in order to resolve specific incidents. In this, resources, facilities/equipment, resource categories, services, service activities and fulfillment preferences are there to manage resources. In tools entity, there is scheduling which helps in allocation in place and work. In classical UI it was known as calendar.

- **Service management area**

This area include some important aspects like configuration of queues to store new cases and subjects for the case categorization and for automatically dropping new cases into the correct queue. In case settings, there is subjects section which is essential for classification of cases. In service terms section, there is entitlements,holidays schedule, customer service schedule,service configuration settings, service level agreements and service level agreements KPIs.

Understanding the customer service entities

- **Cases**

A case is simply a record we store information about a customer service request. Cases allow companies to resolve issues faced by their customers. Cases can also be automatically created from communication coming over email. Just like leads and opportunities in sales hub, there is

case which has a business process flow(BPF) which hepls in guiding the users to resolve the case. Process to resolve any issue :-

->create a case

->Assign a service agent

->Resolve the case

->Reopen if required

When the case is resolved then a case resolution activity is created which stores the details like resolution type, time spent on resolving the case,billable time and remarks.

- **Queues**

Queues are used to organize, prioritize and monitor the progress of work. There are two types of queues i.e. public and private queue. It can be used for different levels of cases that means it can be created for individuals or for the team. It can be used for different levels of cases i.e. when you have high priority cases then a high priority case must be routed to high priority queue which is taken care by the highly specialized resources and similarly for the low and normal priority cases. And when you assign any cases to the queue, a queue item is created.

- **Services**

A service is a work performed for a customer. It includes

➔ Service duration, date and time

➔ Define resources required

➔ Define site required

➔ Used by the service scheduling engine

- **Scheduling**

Scheduling allows us to schedule resources for customer centric activities. In previous updates it was known as calendar. The scheduling represents all the services records that have been created based on the resources and equipment availability and duration of service activity.

- **Knowledge Articles**

An article can be used for knowledge base for service agents. It includes :-

➔ Products guides and data sheets

➔ Frequently asked questions(FAQs)

➔ Problem's solution

➔ Standard operating procedures(SOPs)

➔ Supporting material we can use to guide the representative through steps to resolve a case for a customer.

Understanding Service Processes

• This process is also known as phone to case process. The approach for solving cases through three predefined stages i.e. identify, research and resolve.

• In first step, we identify the problem and here all the details are available of the customer. The details like case number, customer name, case title, email id, contact, description are available in this step.

• In second step, we research about the problem and then assign to the team or the individual to resolve the problem.

• In the last step, we resolve the problem and close the case and if in future we need to reopen the case then we can also do that easily.

Understanding the Customer Service dashboards

The main dashboard of the customer service hub are Tier 1 Dashboard and Tier 2 Dashboard.

• **Tier 1 dashboard**

This dashboard is different from the regular dashboards as they provide a richer experience. We can change the view of this dashboard from stream view to tiled view.

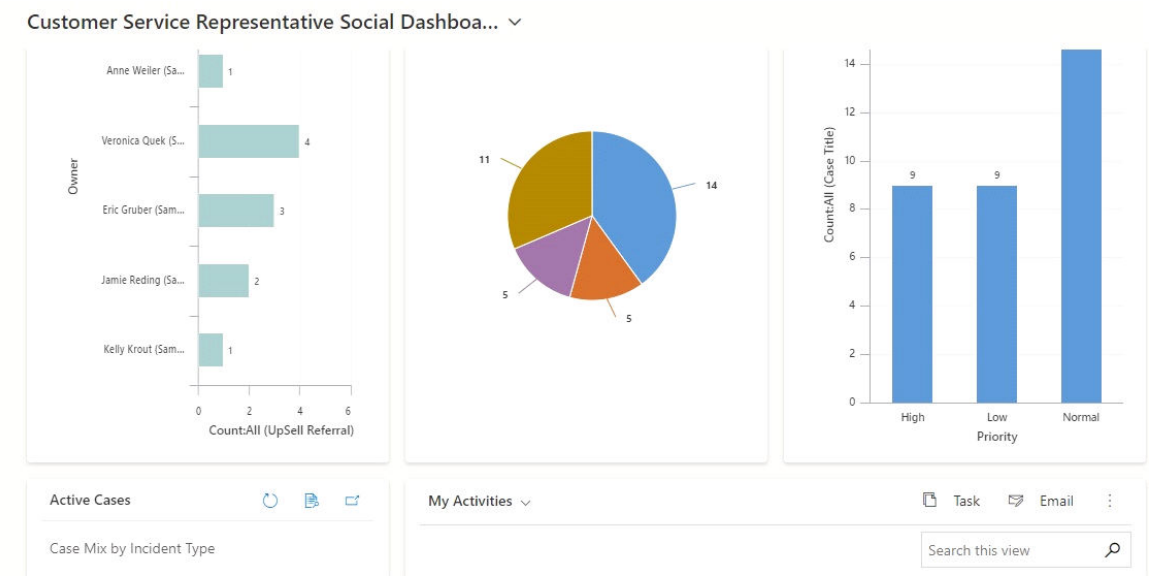
• **Tier 2 dashboard**

Tier 2 Dashboard is designed to give a user a more comprehensive overview across not only their activities and cases that need attention but also more aggregated details about the system's overall performance.

There is six standard dashboard, which are as follows :-

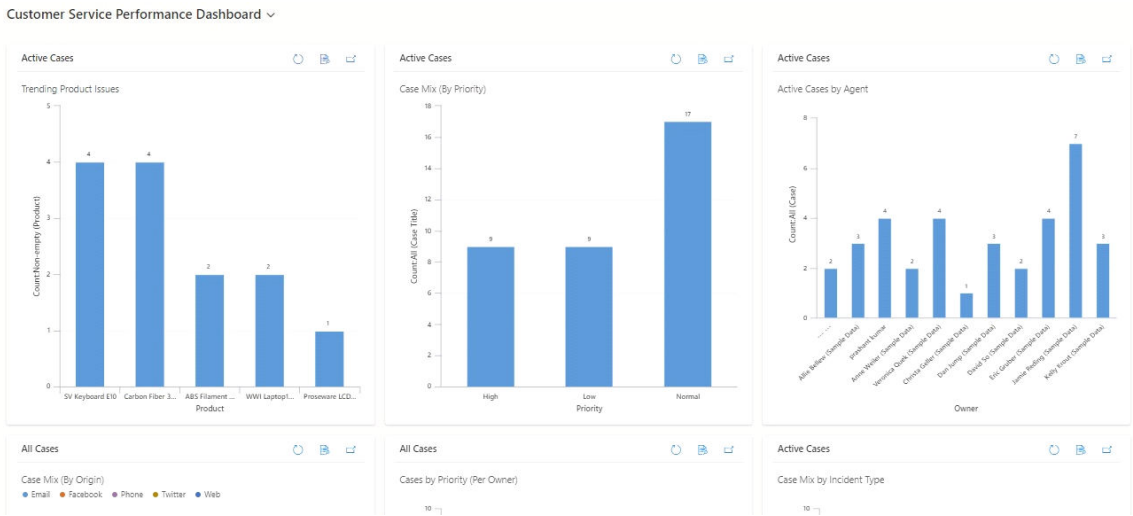
• **Customer service representative social dashboard**

This is the default dashboard for the service module. This dashboard more focuses on list of activities relevant to currently logged in user.



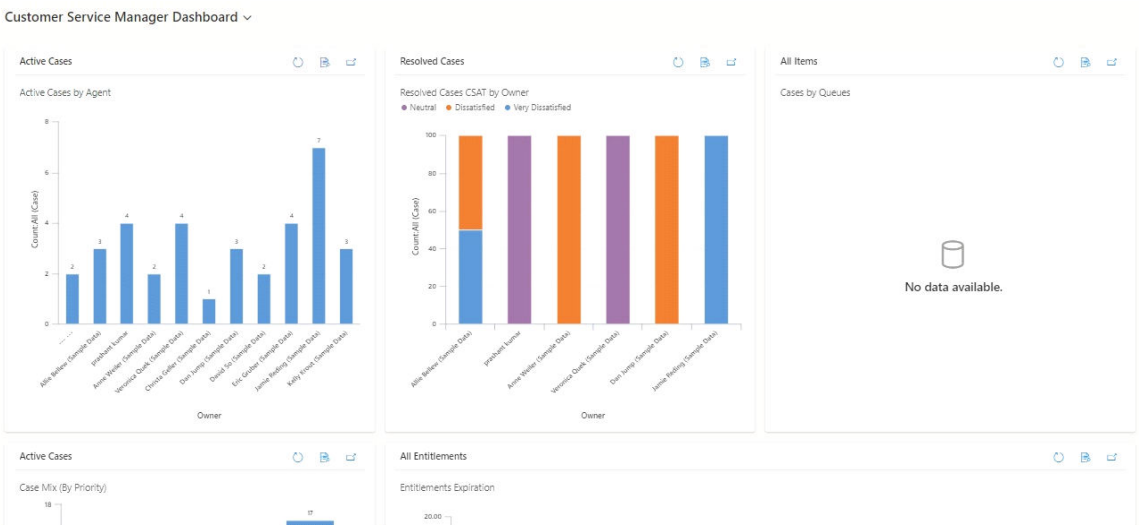
- **Customer service performance dashboard**

This focuses on the service representative's overall performance. It provides a quick overview of the status. With a quick view of dashboard we can determine who is the busiest agent , or which case priority is the most popular.



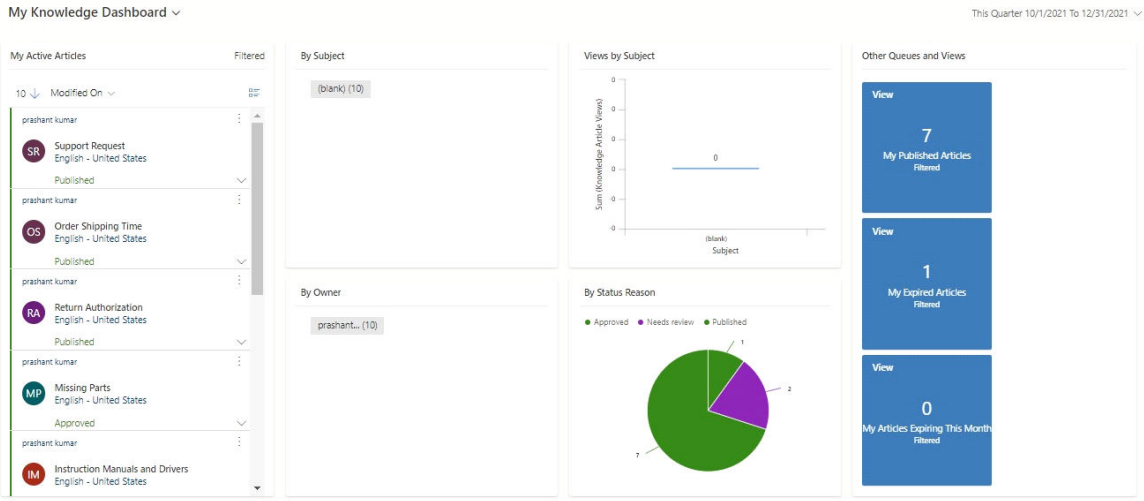
- **Customer service manager dashboard**

This dashboard present views into cases by agents or teams, queues and entitlements and also cases by priority.



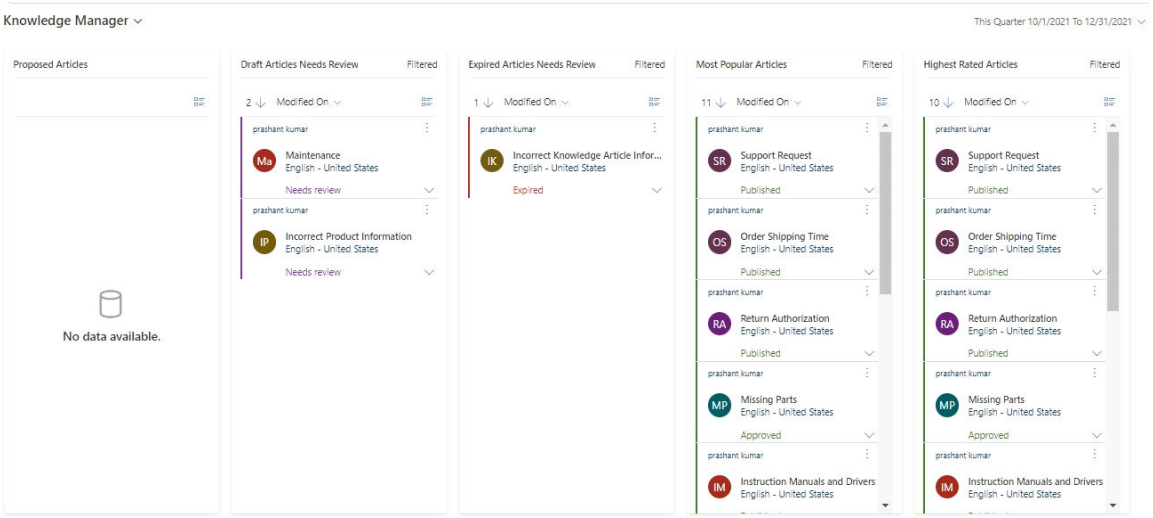
- **My knowledge dashboard**

This dasboard is entirely focused on the a user that creates and manages content for knowledge articles.



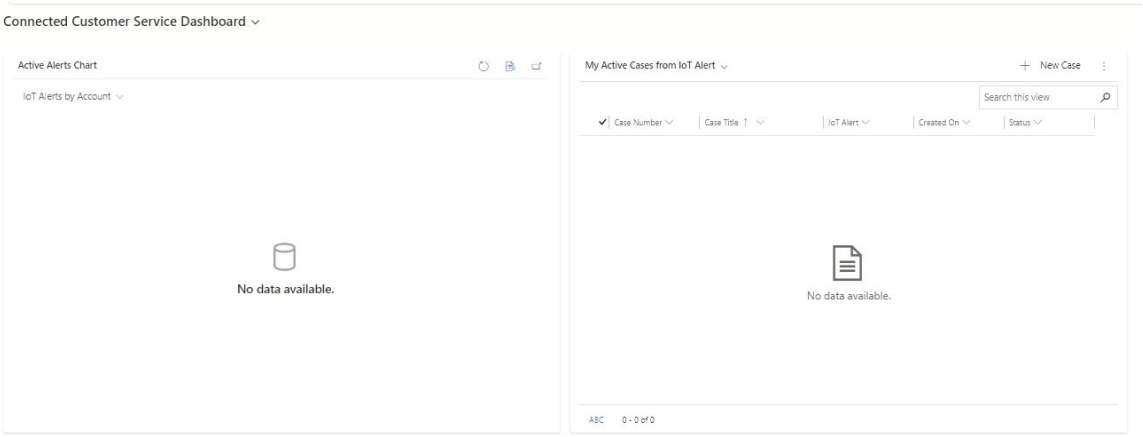
- **Knowledge manager**

This dashboard is less visual and if you want more visuals then you have to switch to a tile view. This dashboard consists details on proposed, drafts ,expired articles and most popular and highest rated articles.



- **Connected customer service dashboard**

This is the last dashboard which integrates with the IoT hub. When the platform is integrated with an existing IoT hub or Azure IoT then it create various alerts and generate cases on the platform.



- ***Service reports***

Service reports are set of standard reports. These include reports around activities, case summaries and service activity volumes. It also shows the maximum number of records that have been returned from a query.

Dynamics 365 Field Service

Why we use field service?

Field service allow companies to manage their mobile workforce. Mobile workforce means people who are going in the field and solving customer problems. For example :- You are selling machines and when you installed the machines at customers place and now your customer face some issue. It may not be possible to bring that machine to your premises and solve it. So you can send a resource in the field at the customer side and then the resource can resolve the issue and come back. So field service allows you to manage the resources who are working in the field and also schedule resources based on the requirements.

Solution features of dynamics 365 for field service

With dynamics 365 for field service, three very common scenarios are served:

(i) Installation

(ii) Regular maintenance

(iii) break-fix scenarios

(i) Installation

In customer service, you might engage in assisting by either providing phone support or by providing links to installation instructions. A technician needs to be dispatched to the customer to perform the installation.

(ii) Regular maintenance

In regular maintenance scenario, servicing is needed when something stops working correctly. It also include scenarios where machinery requires servicing and parts to be replaced rather than waiting for the customer to call.

(iii) Break-fix scenarios

In this scenarios, servicing is needed when something stops working correctly. In this a technician is sent on request from a customer.

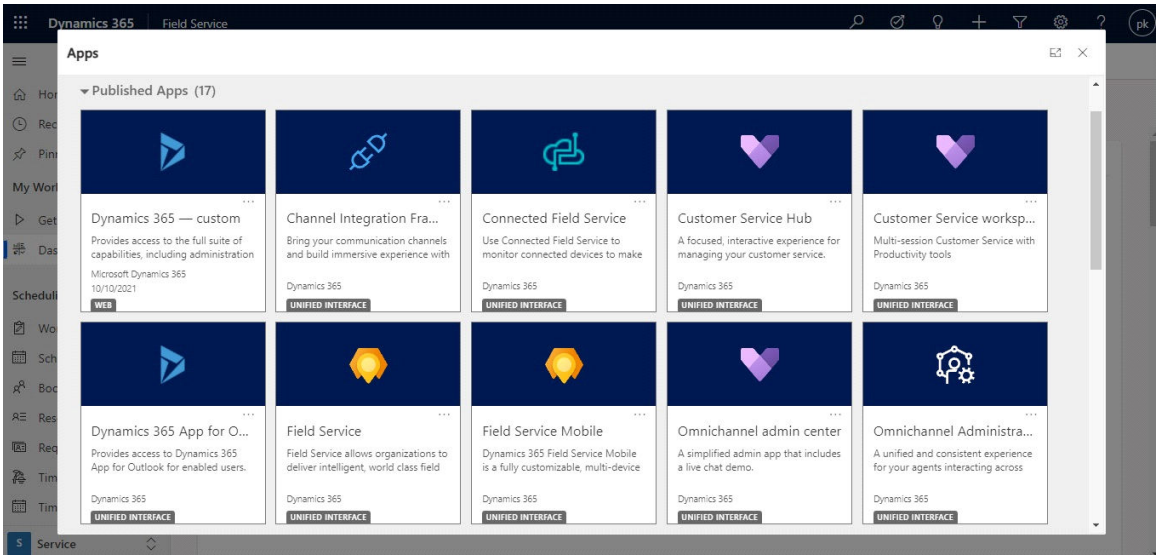
Dynamics 365 for field service- classical web UI

The classical interface is marked with the web label on the app launcher. In classical interface, the entire navigation structured in two main areas i.e. field service area and Service delivery section. Field service area have the section like work orders and scheduling and this section contains work orders, schedule board and resource bookings. The other section was service delivery section which include some core entities such as orders and invoices, agreements,

customer assets and time off requests. The inventory and purchasing area manages inventory, inventory location and customer purchased products and services. In resource scheduling area, it manages the right resource for the right service request. And atlast setting area, where permissions allow a user to acess it.

Dynamics 365 for field service- the unified interface app

In the bottom of each tile, unified interface(UI) is marked which shows the new application as seen below :-



In the app drawer, you can field service section and when you select it, it mainly include two section i.e. Bookings and work order. Bookings section deals with assigning the right resources for a specific work order. And work orders comprises what needs to be done and where.

Understanding core entities in field service

There are some common entities with rest of the apps which includes as accounts and contacts. Work order entites which is at the core of this module are specific to field service.

Accounts and contacts

Accounts are the main customer organization which represents a company we do business with.

Contacts are the people or individuals we communicate with directly. These individuals can also associated with an account as the organization they work for.

Work orders

The work order represents a request for service. A work order is always associated with an account. There will be one or more contact records associated with the account but work order is always related to an account.

Incident types

The incident type in available in work order screen in the primary incident section. There is bit information required to manually populate when creating a new work order from scratch. This section include the information like service tasks, products associated with the service call, the skills required for the technician to be dispatched to customer's site and estimated duration to fix the issue.

Handling scenarios in field service

It involves several users and a standard multi-step process. The main categories are as follows :-

(i) Capturing a work order :-

When we create a new work order which can be created either manually from scratch or from the IoT devices on the real time data supplied.

(ii) Scheduling resources :-

Now we have created a work order and the next step is scheduling the resources. A resource scheduler role user will look for the best available resource to completethe work at the earliest date and time. When the work is assigned is to a technician, he/she will be notified and they can decide to accept the allocation or reject it.

(iii) Fulfilling the work order :-

When the technician accepts the work then they can proceed to the customer,s site to complete the work. When the work is completed then the technician can mark the work as complete on their mobile through the mobile app and capture a customer signature to certify completion.

The post execution steps includes :-

(i) Monitoring by a supervisor :-

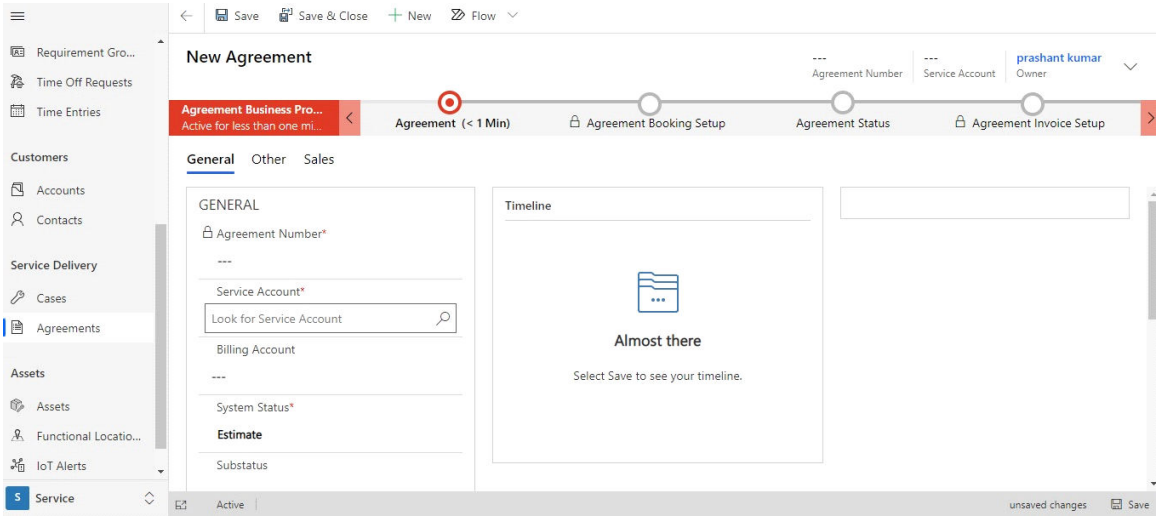
When the technician mark the work as complete then a supervisor will monitor and make sure that the work is completed and the customer is satisfied. After that the supervisor approve the completion of the work.

(ii) Generating the invoice :-

When the supervisor approve the completion of work then an invoice is generated. An invoice is only generated in Dynamics 365 for field service and processed to the customer through integration with the ERP solution in place.

Working with agreements

An agreement is a mechnanism to automatically create work orders on a timed schedule. We can configure agreements in service app in the service delivery area.



For an agreement to generate work orders, it must be set to an active state.

Supporting entities in field service

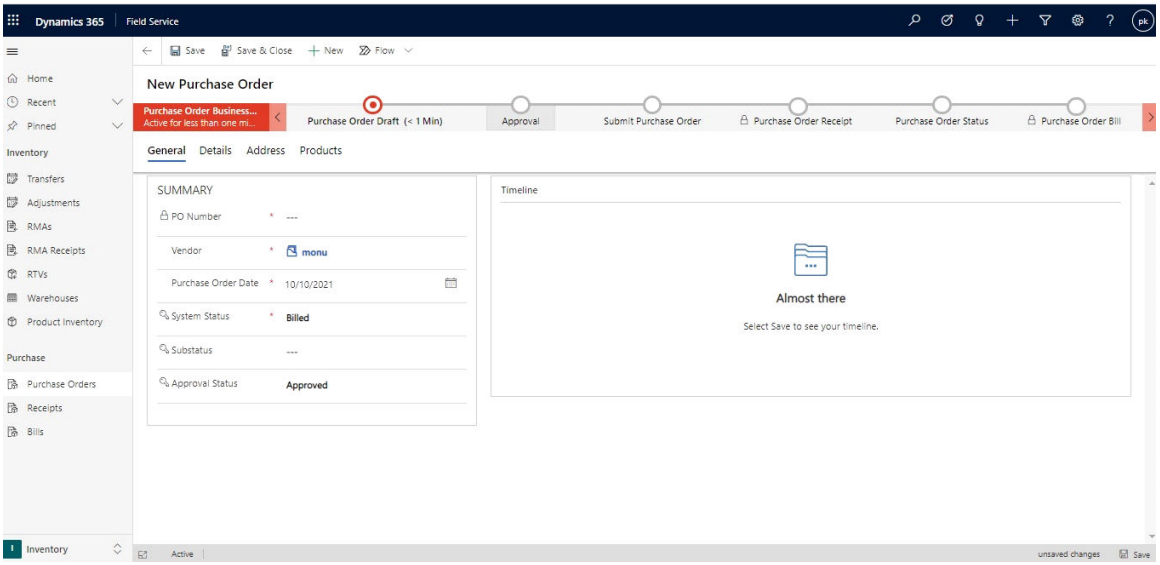
The entities like customer assets, inventory and purchasing comes in additional entities.

(i) Customer assets

Customer assets include products an organization has sold and deployed to a customer or the products customer has engaged to maintain. A customer asset relates a customer to a specific product from your inventory. It also helps us to group assets together.

(ii) inventory and purchasing

The inventory section includes Transfer, Adjustments, RMAs, RMA receipts, RTVs, warehouses and product inventory. The inventory management allows the application to track and manage products and required parts related to work orders. The purchase section includes purchase orders, receipts and bills.



Other supporting integration scenarios

With the help of IoT, connected field service to receive real-time live data from monitored devices and generate work orders. And we can extend the reporting capabilities by overlaying business intelligence using Power BI.

Dynamics 365 Project service automation

Overview of Dynamics 365 project service automation

The core business processes that are handled by the project service automation are :

(i) creating and managing projects

(ii) creating and managing project schedules

(iii) project estimation

(iv) scheduling resources for projects

(v) tracking project progress

PSA users/personas

Project service automation(PSA) integrates with the sales module for collaboration through the sales process and through to project completion. Some most common user roles that leverage this solution are as follows :-

(i) sales and accounts managers

(ii) projects managers

(iii) resource managers

(iv) team members/project resource

PSA applications

Two applications are for PSA :

(i) project resource hub

(ii) project service

(i) Project resource hub

This app have to interact with the platform to submit time entries and expenses. It focuses on the the efficiency as there is no project specific details and acions are available.

(ii) Project service app

The practice management dashboard is the default dashboard of the project service application. This dashboard presents the statistics on project success, cost, hours, margins and utilization. Along with the default dashboard, there are 5 other dashboard present :-

(i) Resource manager dashboard

(ii) Sales activity dashboard

(iii) Sales activity social dashboard

(iv) sales dashboard

(v) Sales overview dashboard

The project service app splits into two main categories :-

(i) Projects :-

It mainly includes the information from a project structure perspective. It includes the section like projects,projects templates, schedule board, resource utilization, resources and roles.

(ii) Resources :-

It mainly includes the structuring the information around resources and their availability. It includes the sections like resources, schedule board, utilization, requirements, bookings and

requests.

Understanding the PSA core entities

Accounts and contacts

Accounts and contacts are common across the entire dynamics family of products. When you create an account in the sales application then it will be same across all applications. When you go through the accounts with the existing ongoing projects allows you to see the projects associated with that respective customer.

Leads, Opportunities and Quotes

As the sales app is common across all the PSA then leads, opportunities and quotes are also common but some condition must be met. Like for a lead to be qualified as a project opportunity, the lead type must be set to work-based.

Project quotes are also same like sales quotes except for some differences which are as follows :-

(i) Project quotes line items can be tracked for both projects and products.

(ii) A projects quote does not support activation and revisions.

(iii) Only one project contract can be related to a project quotes.

(iv) The Project Quote includes some additional fields specific to projects.

(v) The Type value on the Quote differs between Sales Quotes and Project Quotes.

Understanding project service automation scenarios

To support the PSA functionality, they are divided into following major scenarios :-

(i) Planning and delivering projects : Includes project management to create a project structure and a schedule.

(ii) Billing : It works as the estimating and tracking project costa and invoicing.

(iii) Resources : It includes functionality for resource management and scheduling.

Creating and managing projects

PSA allows you to create projects in two ways :

(i) You can create a brand new project from scratch.

(ii) You can create a project based on a project template. Project templates help in quickly

creating projects for similar engagements.

Creating and managing project schedules

Project schedules have the same set of elements that a project and a project template have. PSA supports three generic types of tasks :

(i) Projects root node : The top-most summary task for the project.

(ii) Summary tasks : Rollup tasks for all the leaf node tasks underneath.

(iii) Leaf node tasks : This contains the estimate of effort, resources, start and end dates and duration.

Project estimation

This deals with the total time and the value of the project in giving the clear picture . Also you can determine the efforts required to complete the project. Once you have a project schedule and your project estimates complete, you can include this in a quote line.

Scheduling resources for projects

With a project schedule in place, it's time to determine the actual resources that take part in the project. Once the project is ongoing, assigned resources can start tracking their time against the various tasks that have been assigned to them.

Tracking project progress

Tracking the progress of the project can easily be done by navigating to the tracking tab. You can track either efforts or cost. Managing the project's completion and success are done in a manner that helps not only the project manager, but also all team members understand where we are, what need to do, when we will be ready and whether this will be a successfull project.

Dynamics 365 Marketing

Dynamics 365 for Marketing

Marketing application handles generating and looking after leads. There are several core business processes handles by the application :

(i) Modern and robust email marketing with support for graphical email templates

(ii) Personalized interactive customer journeys

(iii) Organizing and marketing events

(iv) Leveraging LinkedIn for business prospects

(v) Core marketing functionality

Marketing users/personas

The marketing application is targeted at the marketing staff. The marketing roles include the following :

(i) Marketing Specialists and Managers

(ii) Marketing Lead Score Specialists and Managers

(iii) Sales and Account Managers

(iv) Event Planners and Event Administrators

(v) LinkedIn Marketers and Managers

(vi) Survey Designers and Administrators for the Survey package

The Marketing application

This application is a big step forward from the previous version of the marketing functionality available with the platform. This application starts with a Get started with Dynamics 365 Marketing dashboard.

Understanding the core marketing entities

Marketing app revolves around some shared entities, along with some specific entities that serve the marketing functonality. Just like other dynamics 365 apps, this also includes accounts, contacts and leads. The Specifics entities for this app are customer journeys, segments, marketing lists, marketing emails, marketing pages, marketing forms and marketing websites.

Understanding Customers

Before starting any new campaign, you must select the audience first. Creating targeted messages that increase the success rate of your campaign relies heavily on filtering the target audience.

Managing customer segments

If you navigate to marketing then customers and segments then you will a predefined segments. In the first time running through the trials or the new instance, this will be empty.

Marketing execution

Email marketing is the most common way of marketing. In new UI, it not only allow us dynamic content but also allows us to format email messages with rich, graphical presentations. we have support for an increased volume of email communications, capabilities to monitor the user's interaction with these emails, and can also map customer journeys based on these interactions.

Event management

When you organize a public events,it also targets the customers. Dynamics 365 for marketing allows us to plan, budget, promote and analyze attendance for simple or full conference. The event management area is located on the main navigation bar under events.

Creating and managing events

When you navigate in Events, there will be list os existing events in the system. Creating a new event from scratch allows for a full gamut of configurations. Make sure to fill in the required fields and then save it.

Handling event registration

Passes can be issued for different categories like regular attendees, speakers, sponsors, media and so on. The passes can either be sold or given for free. You can add passes for an event by navigating to the **Registration and attendance** tab in the event record. Under the passes section, you can start adding new passes.

Internet marketing

You will want to extend a current portal with the Marketing functionality or create a new portal for marketing in order to leverage marketing specific features, such as the event management website. Leveraging a portal allows for specific Marketing
functionality, including the ability to create and use the following elements :-

(i) Landing pages : Provides data collection forms, such as a Contact Us page.

(ii) Subscription Centers: Provides functionality necessary for a site user or customer to manage their mailing list subscriptions.

(iii) Forwarding Pages: Allows email forwarding with full tracking capabilities.

(iv) Event Websites: Enables functionality for event registration and promotion.

Deploying the marketing portal

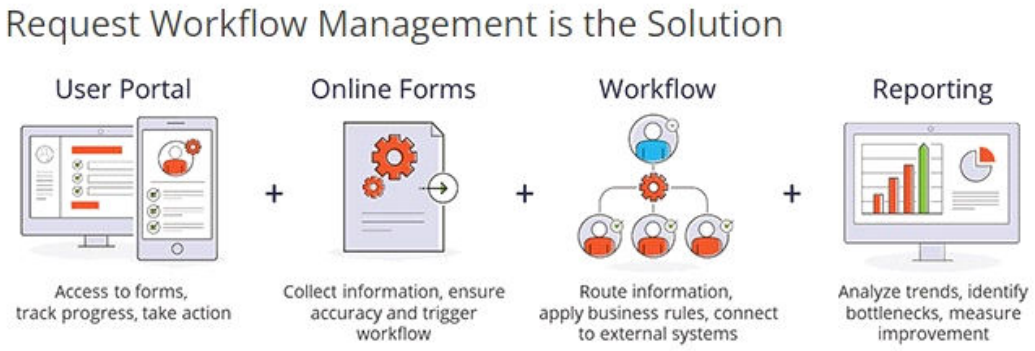
During the portal's deployment, there are two options i.e. Dynamics portal solution or your own custom marketing portal. If you select dynamics portal solution, make sure your license allows you to create. And if you deploy in the marketing portal, you need to go through administration center on the application tab.

Creating and managing surveys

As a part of the marketing application, we have to do the surveys. You can integrate these Surveys with events, marketing emails, and defined customer journeys. This has also the access to the same data records such as accounts and contacts.

What are the different functionalities or entities of Customer Service can be used for the ITT's Request Management System and how? Any additional custom entities required for the ITT's RMS should also be mentioned. For effectiveness of your explanation you can use diagrams, conceptual design, etc.

Request Management is the systematic handling of the tasks required for a variety of different internal or external requests using workflow automation, business rules, and analytics.



It is just like any request or case came to ITT company then how that can be handled, what are the processes involved in that. example- any reimbursement request or requesting IT team when laptop is not working or want some access example is including requests from employees request can also come from customer or any outsider. It focus on Customer service only. It like providing services to customers.