Dynamics 365 for

Customer Service

Greg Degruy P20 Enterprise Walkthrough

Content

STOP!

On the Next Page

5 D365 Customer Service principles

Read and Commit these to memory

1. Omni-channel

Customer need help, they seek help from social media, email, phone calls etc.

2. Self-service & communities

Some customers find the answers themselves, googlebining or exploring community forums.

3. Agent Enablement

Sometimes they can't find the answer 😮, so bring in a human to help.

4. Knowledge

For common questions and answers it's important to collect the data for future use.

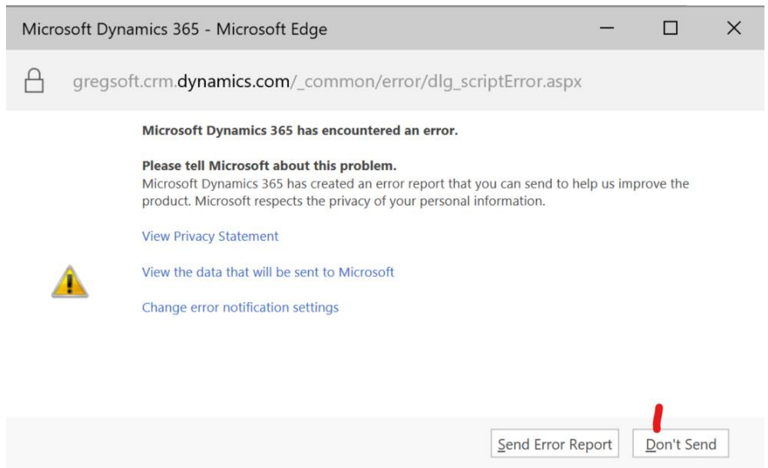
5. Service Intelligence

Intelligence service as a Service as a Solution as a Service.

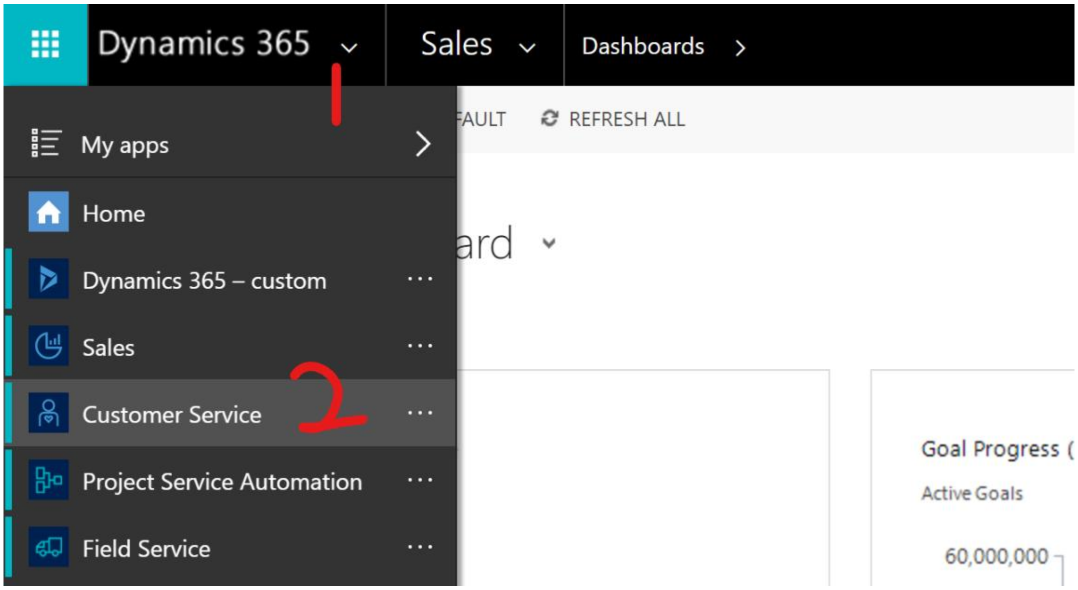
Kicking Off

Customer Service in D365

1. If at any point you see the dialog below, just hit **Don't Send** and continue with the exercise.



2. Make sure you've watched the Customer Service Pitch for D365
   a. https://microsoft.sharepoint.com/sites/infopedia/Media/details/AEVD-3-114282
   b. This way you can connect the **One OCP Message** we want to give to our customers to the exercise . . . or let the writer of the exercise know they did a poor job relating the message to you :P.
      i. When in doubt always go back to the **Page 3** for the Customer Service Principles before the Cheeto… ummmm.
3. Make sure you've completed our first Hands on lab to set up your Dynamics 365 Demo Tenant as we're going use your personal tenant through the exercises.
4. Navigate to your tenant URL.
5. At the top left of your portal, click the drop down arrow next to "Dynamics 365" at 1, then the **Customer Service App** that comes with some sample data with this demo tenant at 2.



6. {INSERT OTHER PRERQES HERE POSSIBLY}

Define your Customer Service Standards

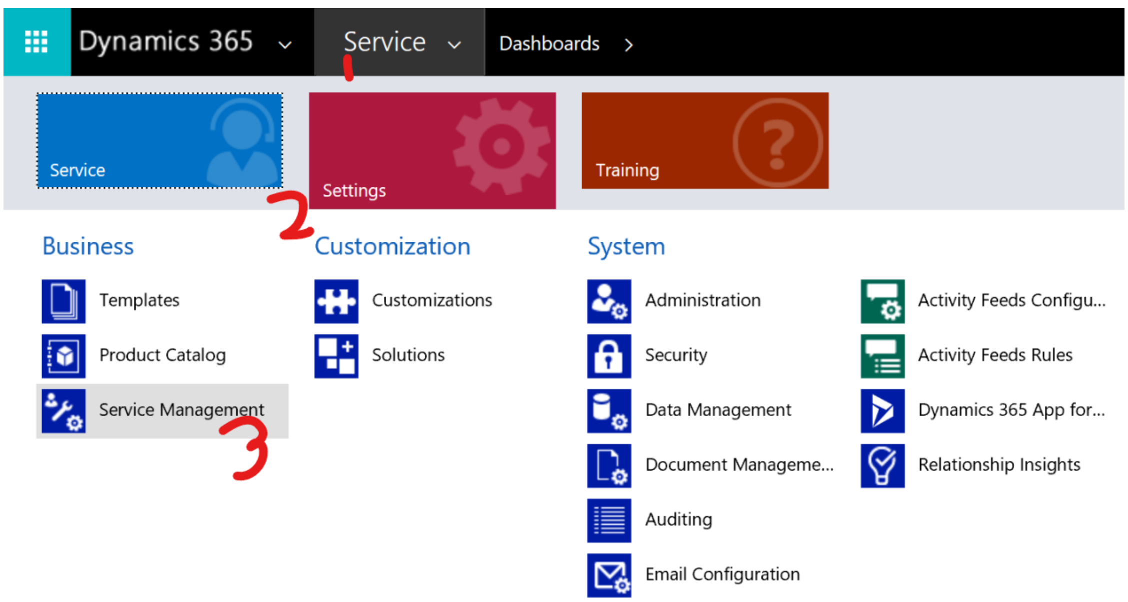
Making a Standard SLA

Note

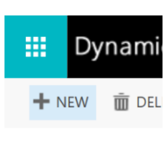
You will need the Customer Service Manager, System Administrator, or System Customizer security role or equivalent permissions to create an SLA.

The demo tenant you made in the hands on lab to cerate your demo tenant will have already provisioned the right security permissions for you.

1. Using the Site Map, click on **Service** at the top, go to **Settings** > **Service Management**.



2. Go to **Service Level Agreements** under **Service Terms**.
3. To create a new SLA, on the command bar, click the **New** button in the top left.



4. You'll see the **Create SLA** dialog box. Type a name for the SLA (like **DaBombDotComSLA**), and then in the **Entity** drop-down list, select **Case**. If case is already in the box, no need to hit the drop down list.

Note

You can only create a standard SLA for the **Case entity**.

5. Fill in your information:
   - **Applicable From**. Select the case field that specifies the date and time from which the SLA items will be calculated.
   - For example, if you click the **Created On** field, the calculations for service level agreements will start from the time the case is created.

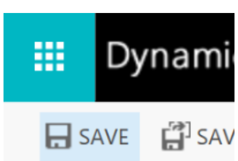
Note

You can have multiple SLA KPIs (**Key Performance Indicator –** no shortage of acronyms here **:P**) within one SLA. The start time for different SLA KPIs within an SLA is set at the SLA level and can't be different across SLA KPIs. The start time is determined by the Applicable From field value.

   - **Business Hours**. Leave this blank.

     This is useful in the SLA time-tracking calculations. If a business hours record (customer service schedule) isn't selected, the work hours are considered to be 24 x 7.
   - **SLA Type**. Select **Standard**.
   - **Allow Pause and Resume**. Select **Do Not Allow**. Because standard SLAs do not support pausing and resuming of SLAs, you can set this field to **Allow** only when you're creating an enhanced SLA.

6. Click **Save** in the top left.



SLA

7. To add SLA details, in the **SLA Details** section, click the **Add** button + and a new window will open that is the SLA item form. Move onto to step 8 after the loooooon note below.

Note

You add SLA details to define the **key performance indicators** (KPIs) or metrics for the service level agreement. You can define any KPI your organization needs. For example, a KPI could be that all cases for standard customers must be resolved within five days of case creation.

Define success criteria and the failure and warning actions that need to be taken when a service level metric isn't met for a customer case.

SLA KPIs are performance indicators that you'd like to track, for example First Response or Resolve By. SLA items refer to SLA KPIs based on specific conditions. You can add multiple SLA items and arrange them in the order that works for you. For any given KPI, only the first SLA item that matches the conditions in the **Applicable When** section is applied.

In Microsoft Dynamics 365, SLA and SLA KPIs (SLA details) use the process (workflow) functionality. Although SLA KPIs use workflows, not all of the actions available in workflows are available for defining the failure and warning actions. The available actions are currently limited to **Send Email**, **Create Record**, **Update Record**, **Assign Record**, and **Change Status**. More information: [TechNet: Create and edit processes]()

8. Fill in the information in the New SLA Item form:
    - **Name**. Type a meaningful name… like **DaBombDotComKPI**
    - **Related Case Field** (to the right of the name field). Select the **First Response By** option from the drop-down list.

      Note

      When a case record is created or updated, in the case record this field is set to the date and time when the failure time will be reached for the respective SLA item. For example, selecting **First Response By** in **Related Case Field** and setting **Failure After** to 2 hours from case creation. If the case is created at 09:00, the **First Response By** field in the case record will be set to 11:00, assuming the business hours are 24 x 7.

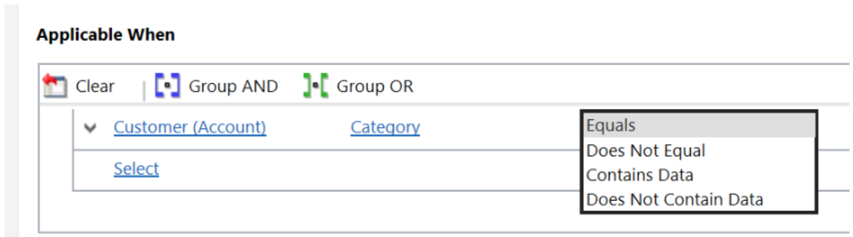
      By default, there are four options available in the drop-down list. If you want to track other KPIs, ask your system customizer to create case fields of type date-time.

    - In the **Applicable When** section, define the conditions under which the KPI will be applicable.

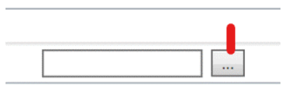
Follow this example by choosing the "Select" text to open the drop down options, like in the **START** screenshot below. Do this until you have a table like the **FINAL** screensho below.

If you get stuck see below for a few pointers

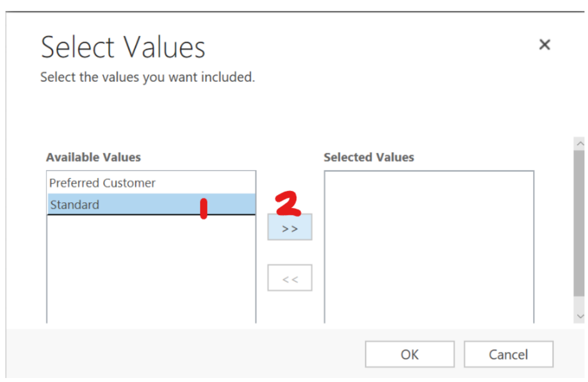
START



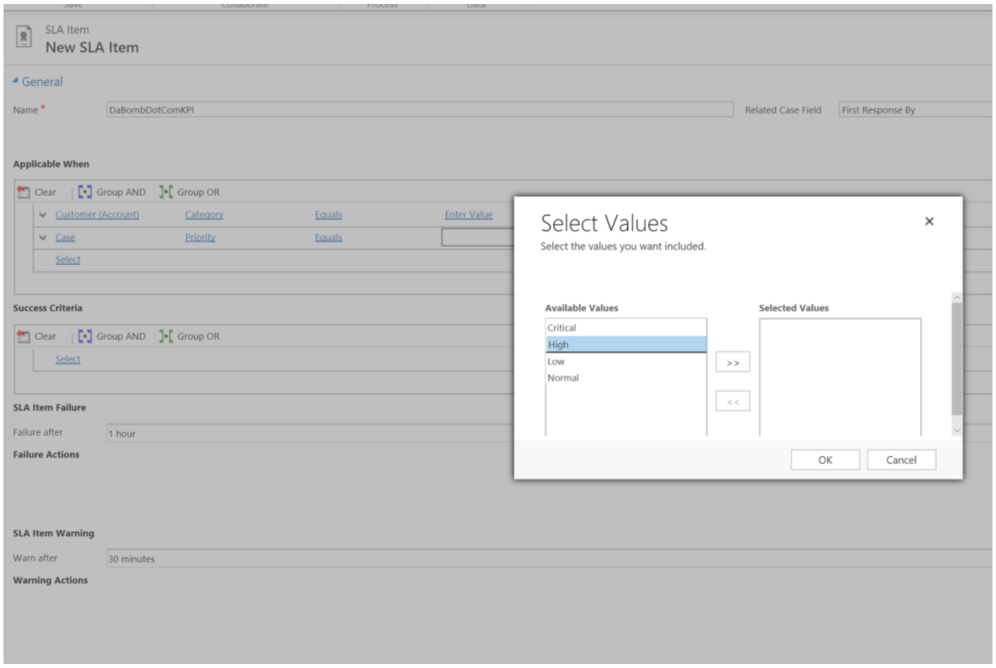
- *Pointer 1*: That last column is weird… to add the value there you'll need to select the **button** with the 3 dots **[...]** seen below



- *Pointer 2:* This will open a **Select Values** screen, where you'll first need to click on your 1 option then hit double arrow button 2 **>>** and then hit **OK**. That was exhausting even for me :P.

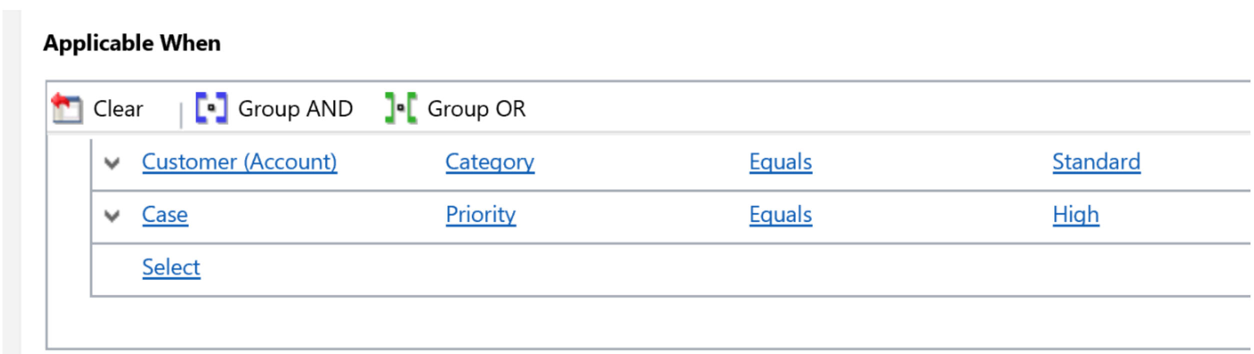


- *Pointer 3*:



- -

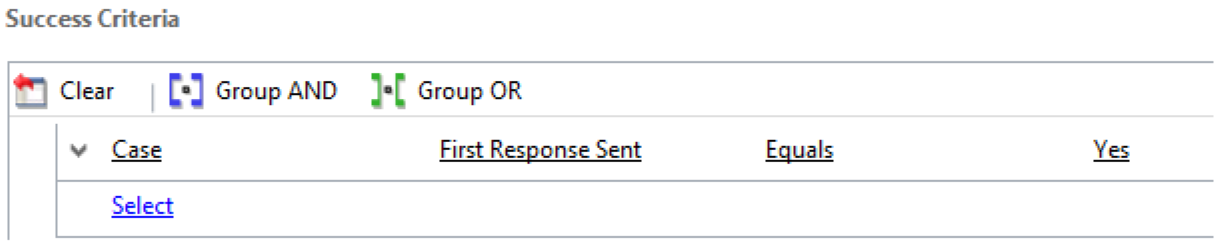
FINAL



Note

If there are multiple clauses, and you don't use AND or OR grouping, by default the clauses will use the AND grouping.

- In the **Success Criteria** section, specify the conditions to define when the KPI will be considered as met. For example, the conditions could be as shown here.



Note

Before you specify the SLA failure and warning actions, save the SLA item record.

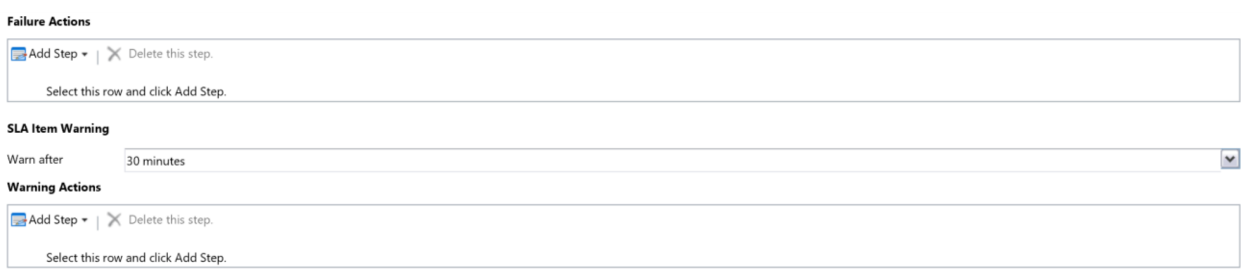
- Under **SLA Item Failure**, in the **Failure After** drop-down list, select **1 hour**.

  This is when the SLA items will be considered as failed. In this guide the KPI will be considered as failed if the first response is not done within 1 hour of case creation. 1 hour is calculated based on the value in date/time field that you select in the **Applicable From** field of the SLA record.

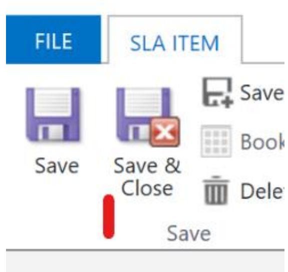
SUPER IMPORTANT Note

If you don't see options to configure the next steps

Options should look like this



Hit **Save & Close** and then in the **SLA Details** from your Dynamics Portal click the SLA you've just created.



If you do you see these options then I guess this note wasn't that important ☹ sorry 'bout that

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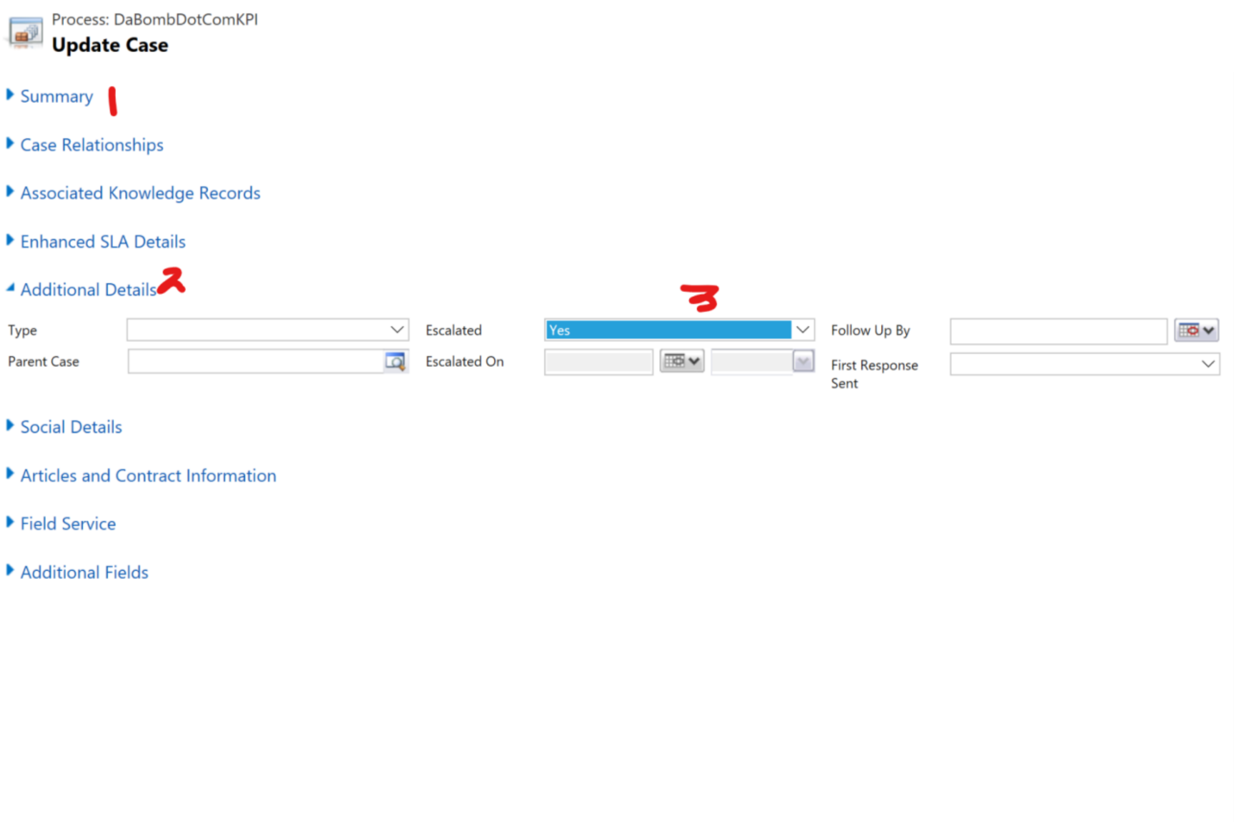
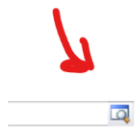
- In the **Failure Actions** section, click **Add Step**, and choose **Update Record**. Then select **Case** in the drop down box and click the **Set Properties** button. ANOTHER WINDOW 😅.
    - Click on the Summary and Enhanced SLA Details text once the window opens to minimize all that unneeded noise. Now in the new case record window, change the value of the **Escalated** field under 2 **Additional Details** to "Yes", and then hit **Save and Close** at the 'top.

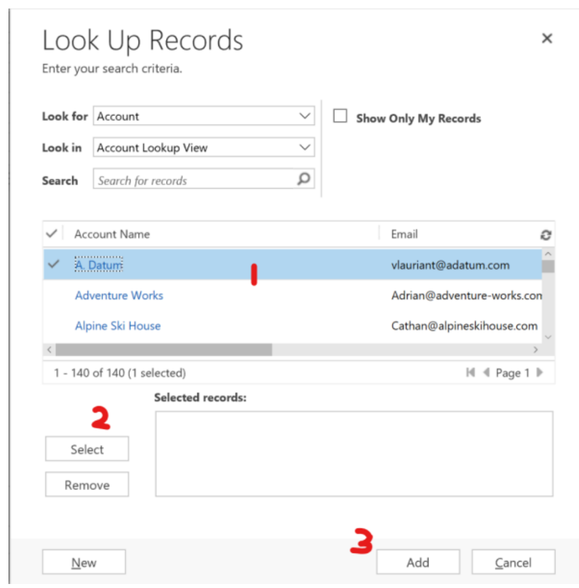


- Under **SLA Item Warning**, in the **Warn After** drop-down list, select **30mins**.
- In the **Warning Actions** section, click **Add Step**, and then click **Send Email**. Then select **Create New Message** and click **Set Properties**. ANOTHER WINDOW 😒.
    - Now in the email record, type the email details, and . . . so many details

- In the **From** field you should be able to type in an email address.
- In the **To** field you'll need to first click the small magnifying glass icon then look up a record.

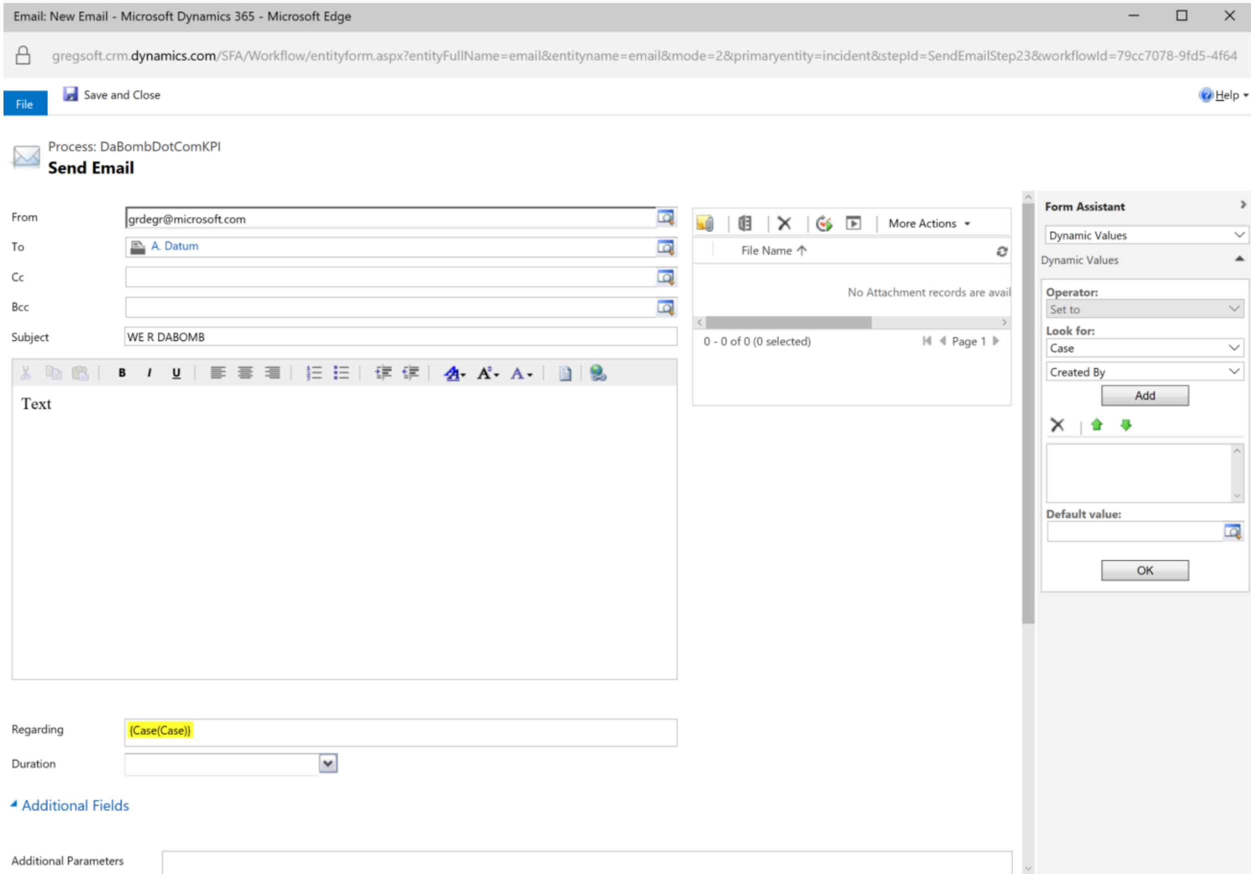

.

Then 1 click on a record, click 2 **Select**, and finally 3 click **Add** and the windows will close brining you back to the email form and fields.



- Leave **cc** ot **bcc** blank.
- Add a **Subject** line like "WE ARE DABOMB".
- Type some text in the email body

- Details should look something like this on the next page once finished



- Then click **Save and Close**.

Note

The time for failure and warning is calculated after considering the business hours selected in the SLA record. If a business hours record (customer service schedule) isn't selected, the work hours are considered to be 24 x 7.

Important

Make sure that you don't have too many SLA Items in an SLA, because that can directly impact the create and update operations on the record on which the SLA is applied or re-evaluated. We recommend you not have more than 15 SLA items in an SLA record for performance reasons.

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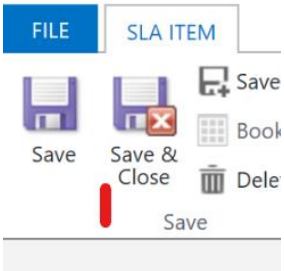
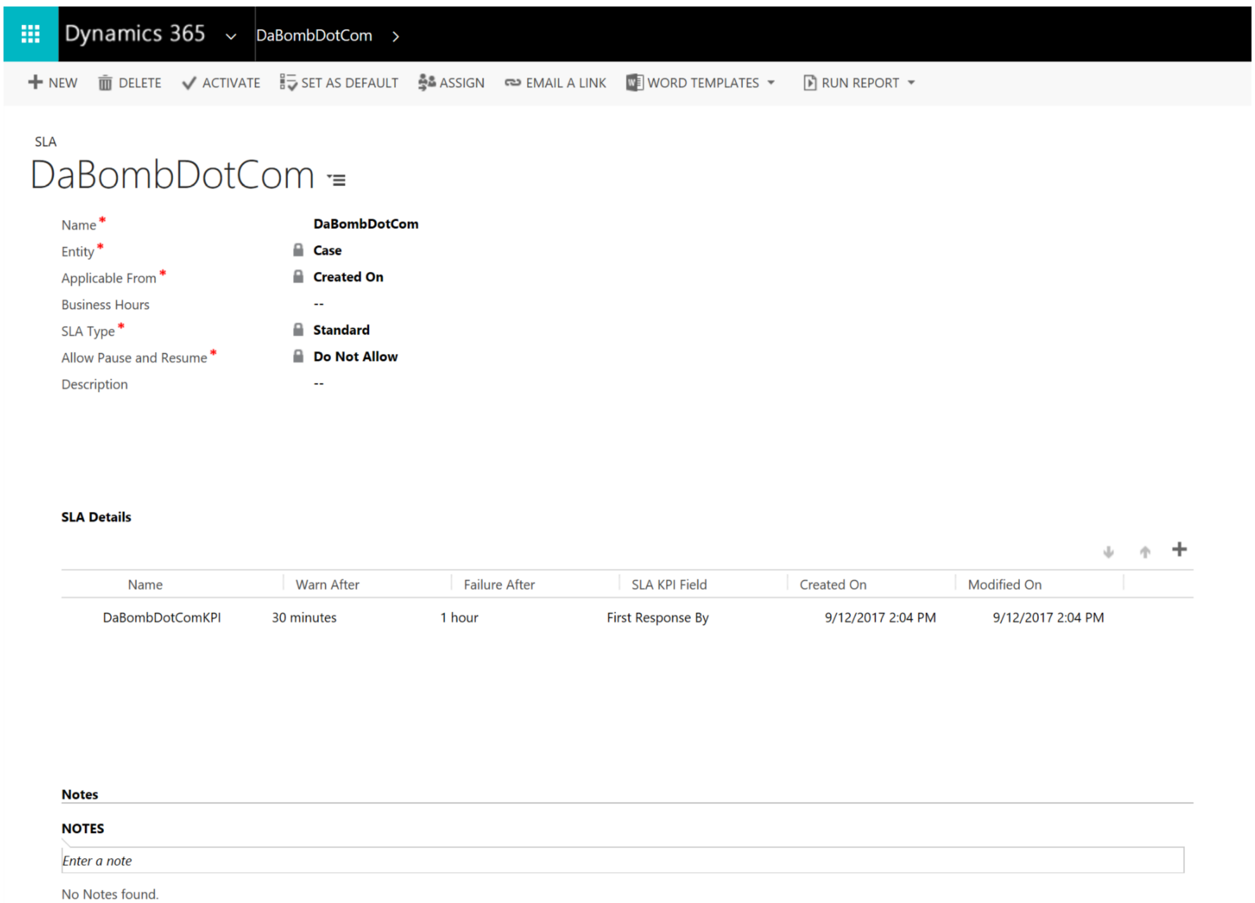
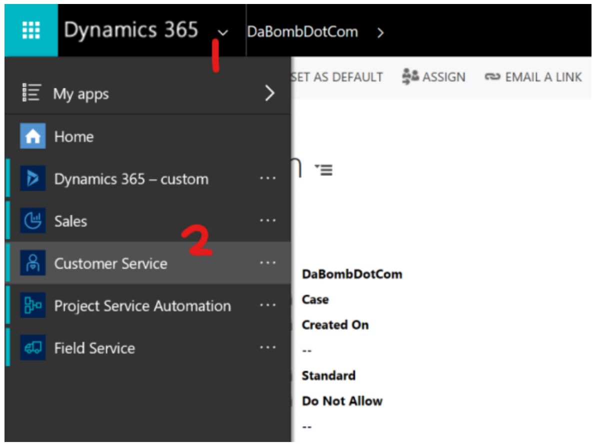
9. You should be back on the SLA Item page now and that's really hit. A long rough road, but now we've dot some automatic email logic wired into our SLA.

10. Click **Save and Close** and should be brought back to the D365 Page for your SLA, in my case **DaBombDotCom**.





11. That's it! Let's move on the next exercise, 1 click the arrow next to Dynamics 365 and then 2 the click Customer Service.



The Service Calendar

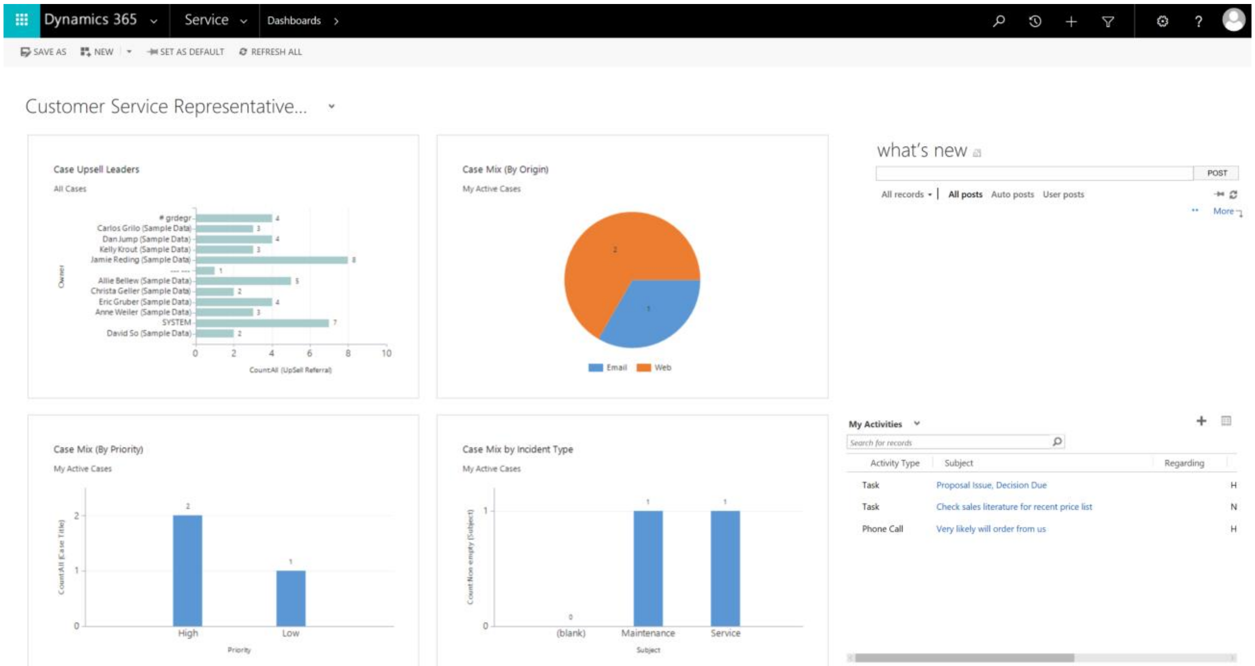
* This will be mainly a point and click showcase so you're aware of the Service Calendar.

In the Service calendar, you can do the following:

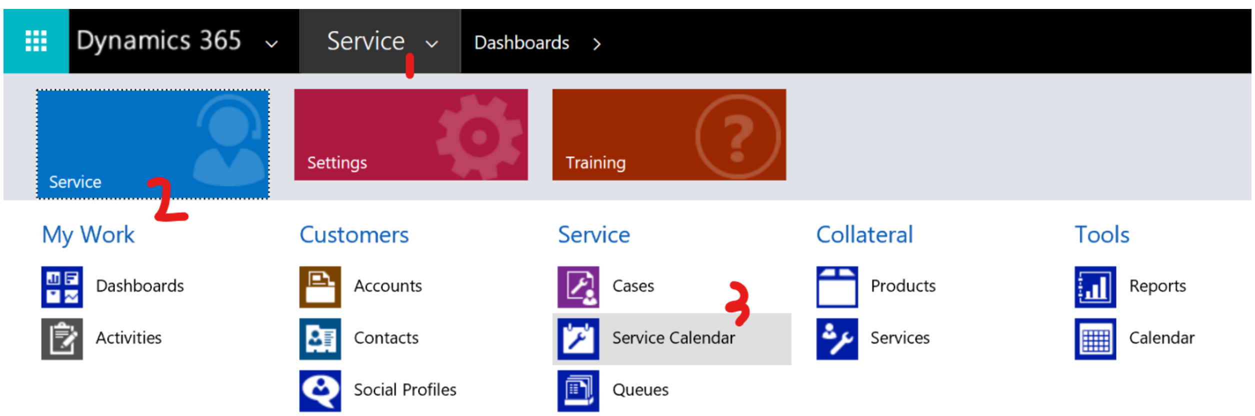
- View your organization's daily, weekly, and monthly schedule of appointments and service activities.
- View work schedules and service activity schedules for a variety of resources.
- Create new appointments and schedule service activities.
- Change the status of an existing service activity.
- Search for conflicts in the schedule.

You can't customize the Service calendar or change the default view with the application. However, you can ask your system administrator to change the colors of the time blocks.

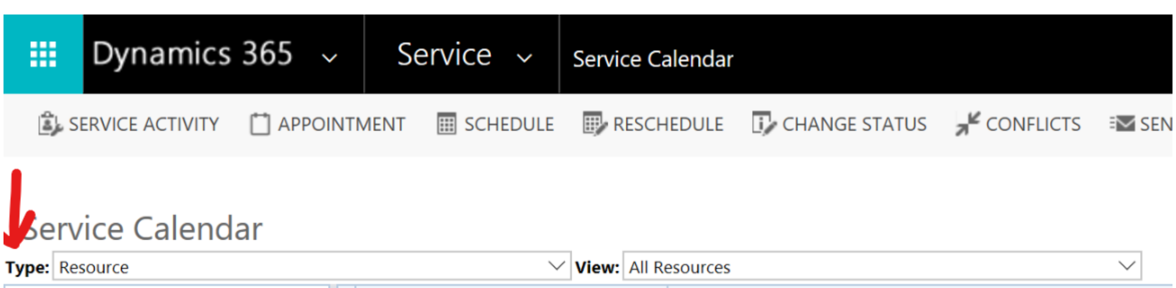
1. You should now be on this page



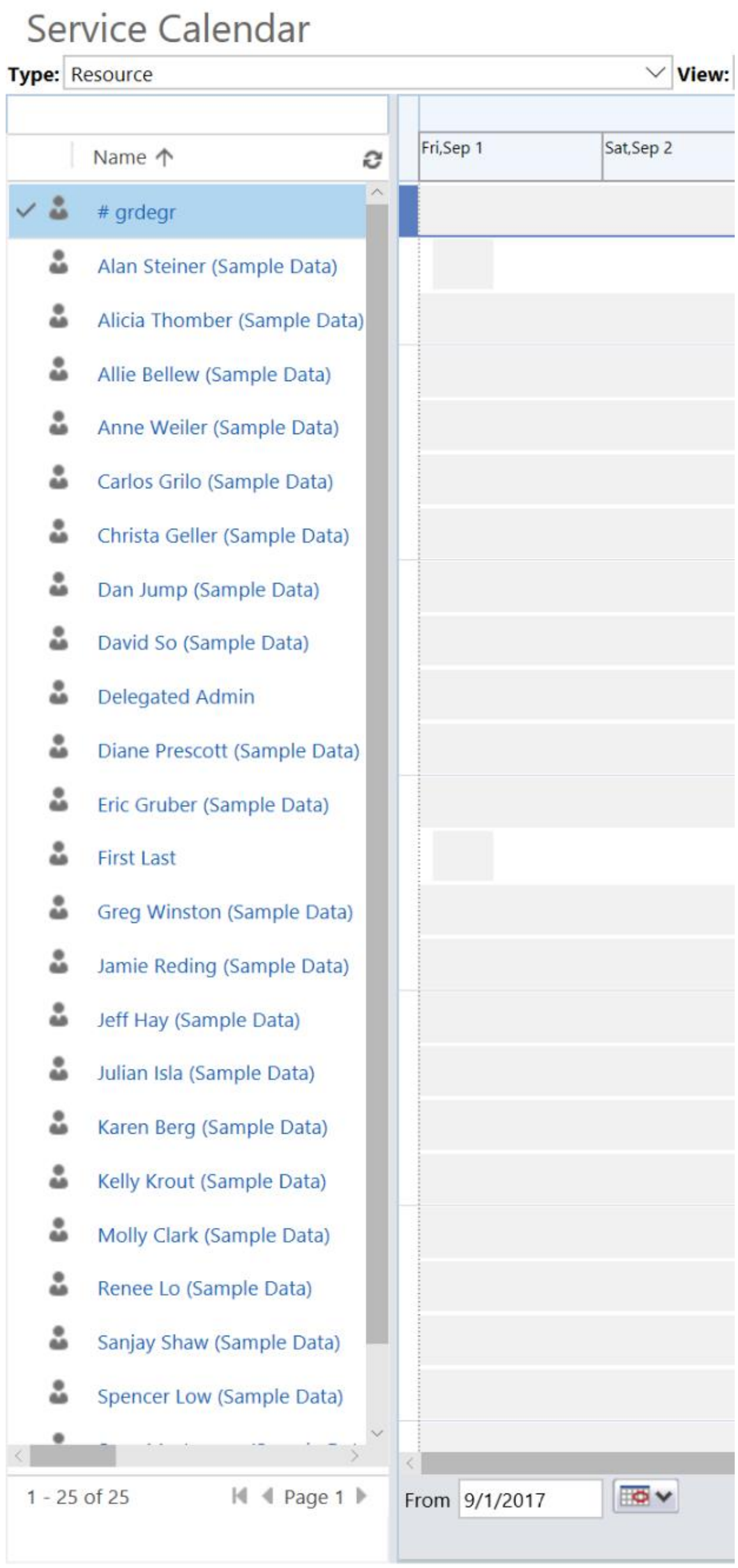
2. Go to 1 **Service** > 3 **Service Calendar**.



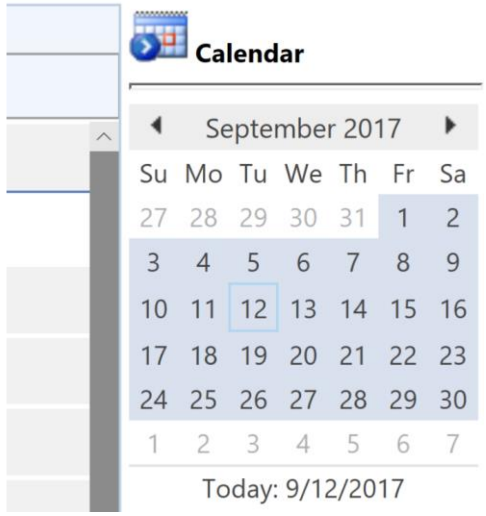
3. To view the details of any resource, appointment, or service activity, select the record in the list to the left of the calendar. Notice I have the type **Resource** selected.



All Records will be on the left hand side


Service Calendar
Type: Resource
View:
Name
Fri,Sep 1
Sat,Sep 2
grdegr
Alan Steiner (Sample Data)
Alicia Thomber (Sample Data)
Allie Bellew (Sample Data)
Anne Weiler (Sample Data)
Carlos Grilo (Sample Data)
Christa Geller (Sample Data)
Dan Jump (Sample Data)
David So (Sample Data)
Delegated Admin
Diane Prescott (Sample Data)
Eric Gruber (Sample Data)
First Last
Greg Winston (Sample Data)
Jamie Reding (Sample Data)
Jeff Hay (Sample Data)
Julian Isla (Sample Data)
Karen Berg (Sample Data)
Kelly Krout (Sample Data)
Molly Clark (Sample Data)
Renee Lo (Sample Data)
Sanjay Shaw (Sample Data)
Spencer Low (Sample Data)
1 - 25 of 25
Page 1
From 9/1/2017

4. The Calendar pane appears on the right side of the calendar. It can be collapsed or expanded. To change the date, click a date in the calendar. Use the arrows on either side of the month to change the month displayed.



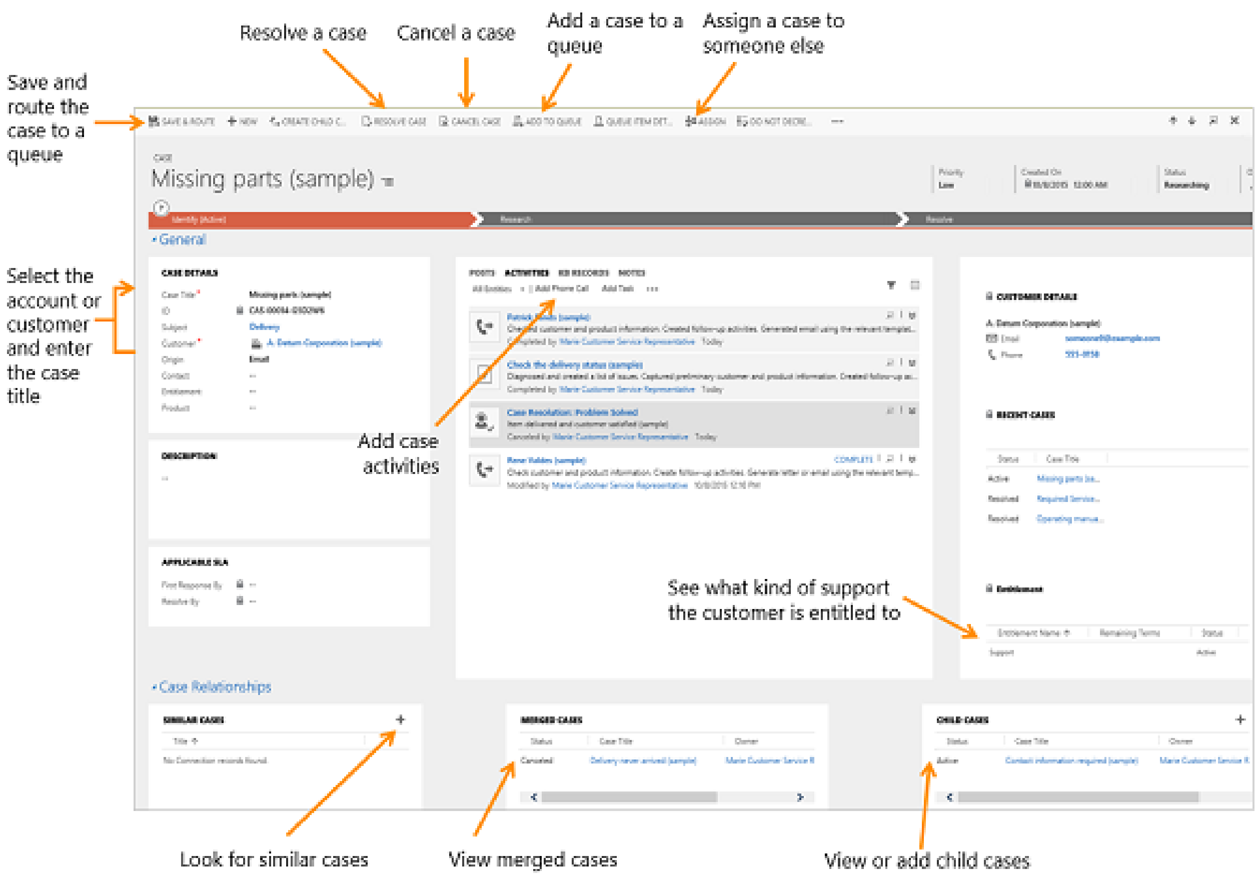
5. To change the number of days that are displayed in the linear calendar, click any of the calendar options in the Calendar pane.
6. Not much to show on this exercise, unless you want to walkthrough another form and windows insides windows insides windows 😭. Let's move onto something new.


I CHANGED ALL MY PASSWORDS TO "INCORRECT".
SO WHENEVER I FORGET, IT WILL TELL ME "YOUR PASSWORD IS INCORRECT."

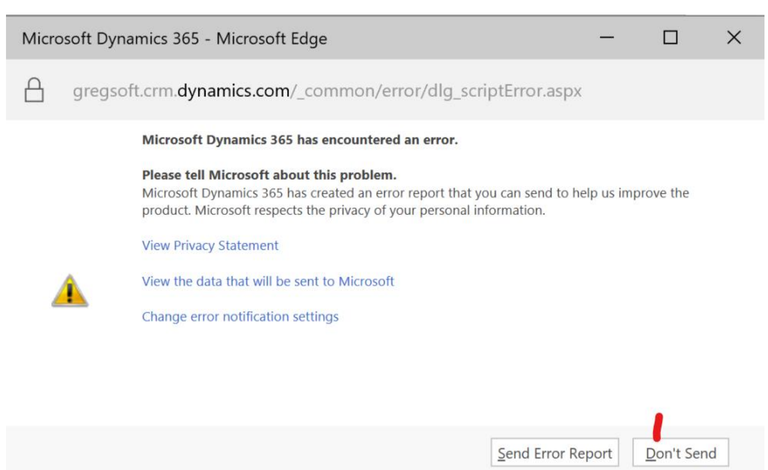
Got tons of Cases, need to Manage them 👬

Case Records

1. Are made up of the following components. So Many :O.

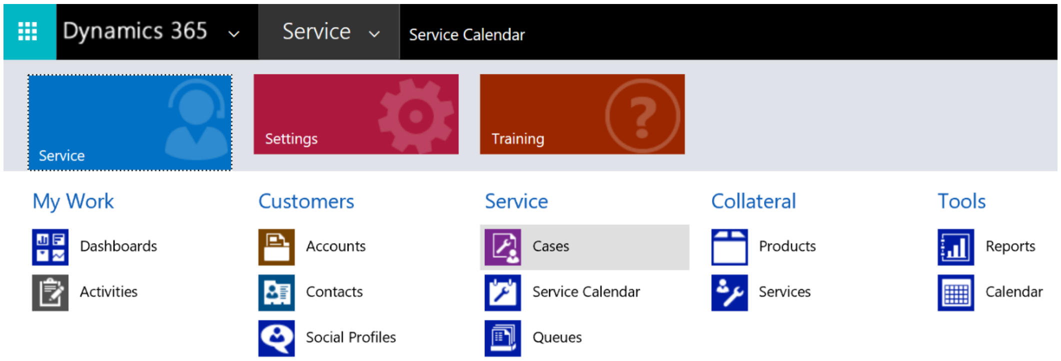


If at any point you see the dialog below, just hit **Don't Send** and continue with the exercise.

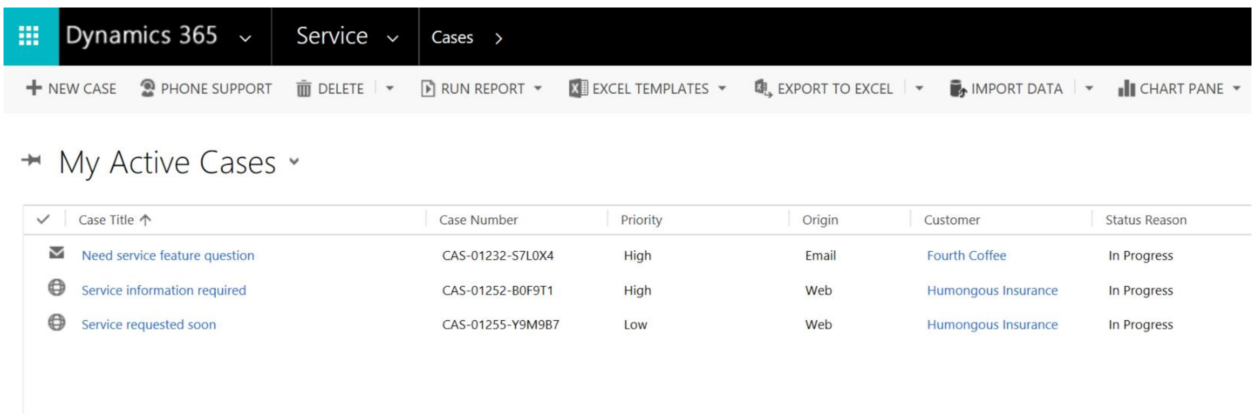


How to Make a Case

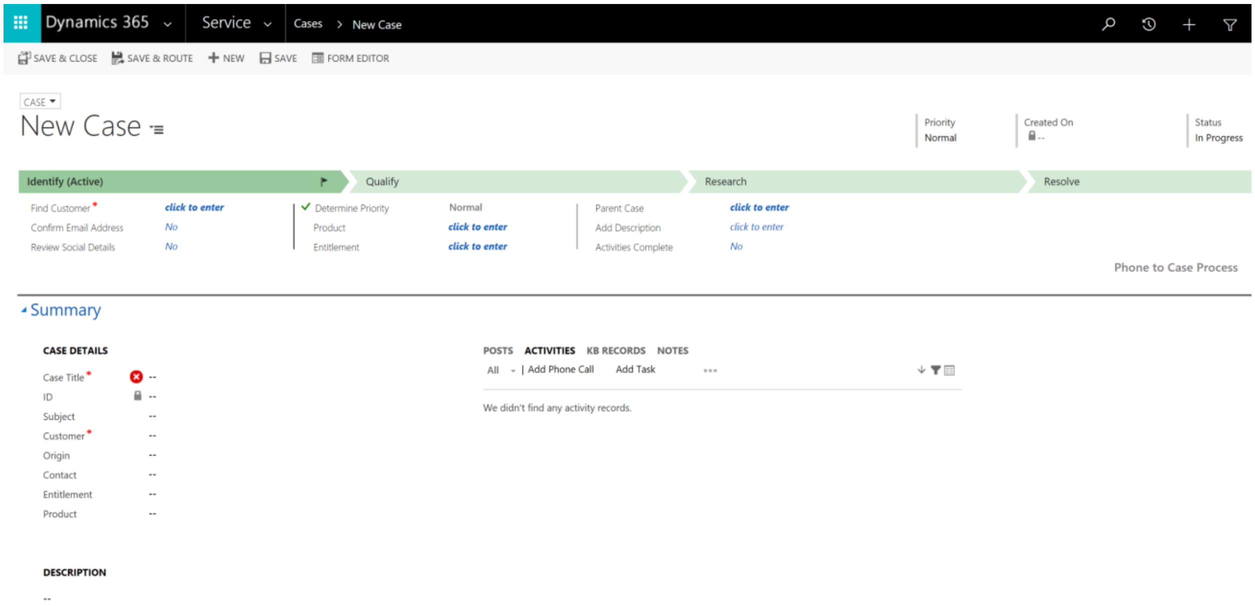
1. Go to **Service** > **Cases**.



2. You should now be on the My Active Cases page

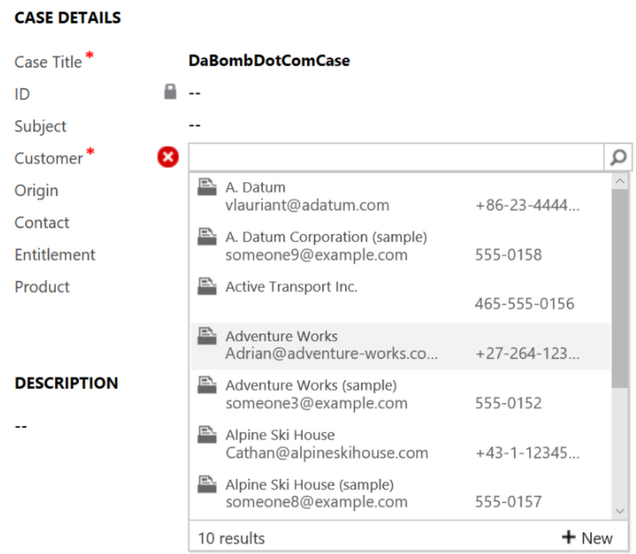


3. Click **New Case**.

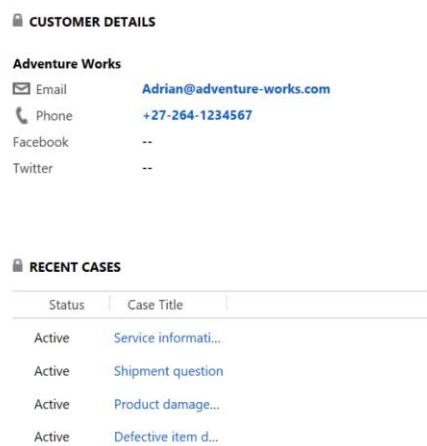


4. Give a **Case Title** like “Customer needs there sink fixed.”
5. Find the customer: Also notice how the case has 4 stages: Identify, Qualify, Research and Resolve and also marks the active stage with the time the case has been in that stage.
    a. Click the **Customer** lookup button.

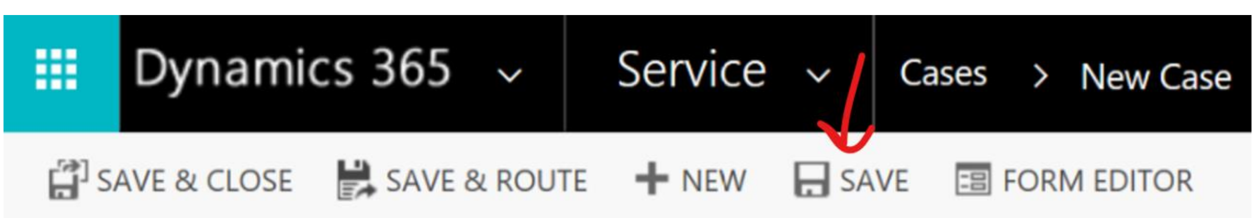
And select “Adventure Works”



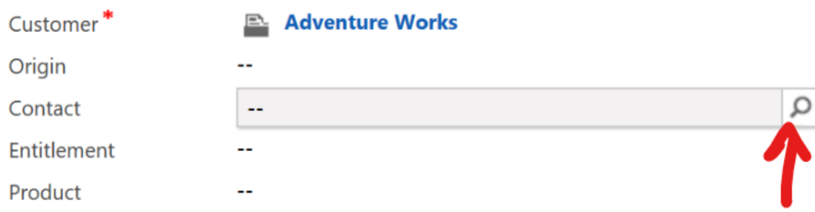
When you select an existing customer, the customer details will show the contact details on the right hand side of the page, along with recent cases and activities for the customer. VERY USEFULE, it looks like this



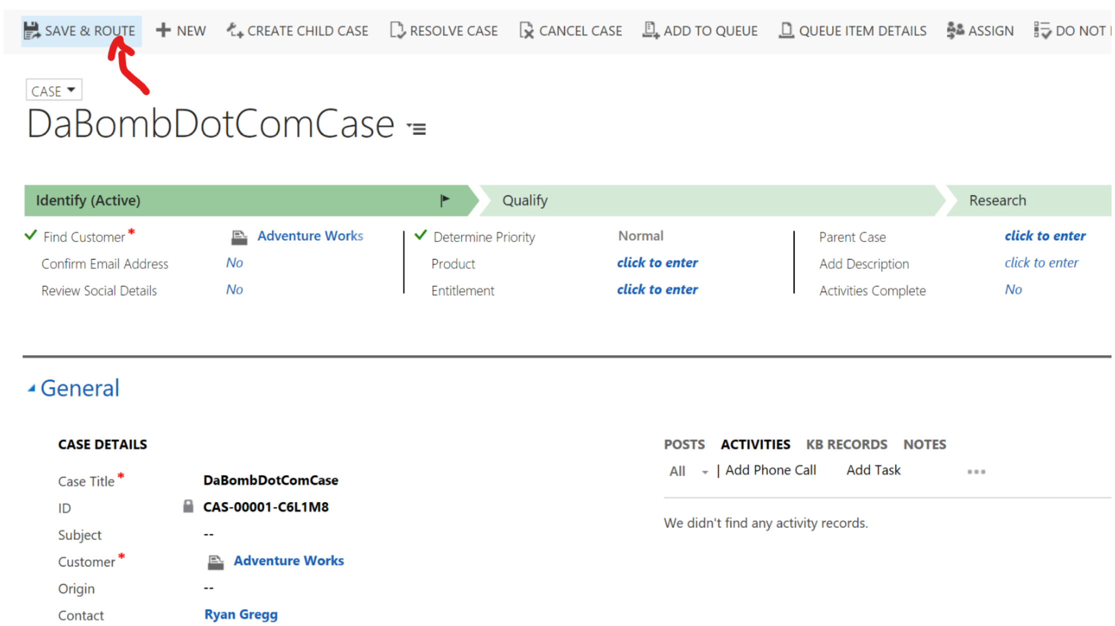
CLICK SAVE NOW, important because whenever you switch tabs or move a document over your browser window the browser will remove any unsaved information immediately ☹



6. Click the **Contact** lookup button and select Ryan Gregg for the case or click **New** in the inline lookup results to create a new contact record.



7. Click **Save and Route**



Important

This feature was introduced in CRM Online 2015 Update and CRM 2015 (on-premises).
For more information on getting this feature visit Find your Dynamics 365 administrator or support person.

Before you create a new case in a real scenario, **ALWAYS** check if there is an existing case:

1. From the **Identify** area of the process bar, click the **Find Case** lookup button and then select a case from the list of cases.
2. If a case doesn't exist, click **New** in the inline lookup results to create a new case record.

*the docs seem outdated here as even I couldn't find this *process bar*.

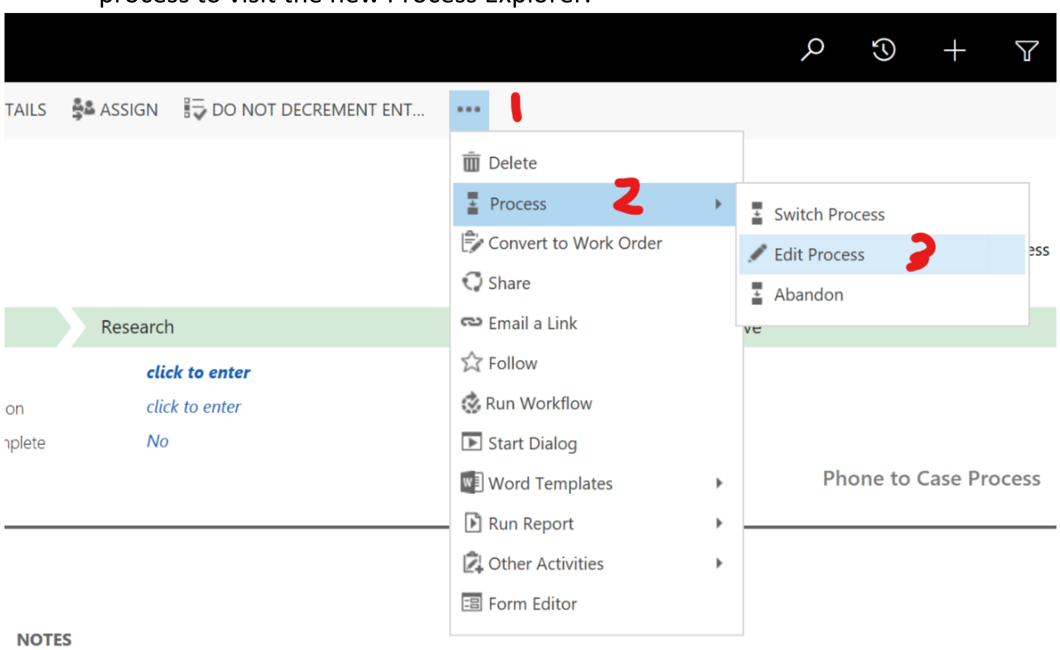
Note

- If your manager has set default entitlements for a customer, a default entitlement is automatically associated with a case when:
  - A case is created
  - A case is updated and the customer, contact, or product field has changed
- When a case is created and an entitlement is applied to it (or when the case gets resolved), the entitlement terms from the associated entitlement are decremented. However, if you don't want the entitlement terms to be decremented for a case, from the command bar click **Do not decrement entitlement terms**.

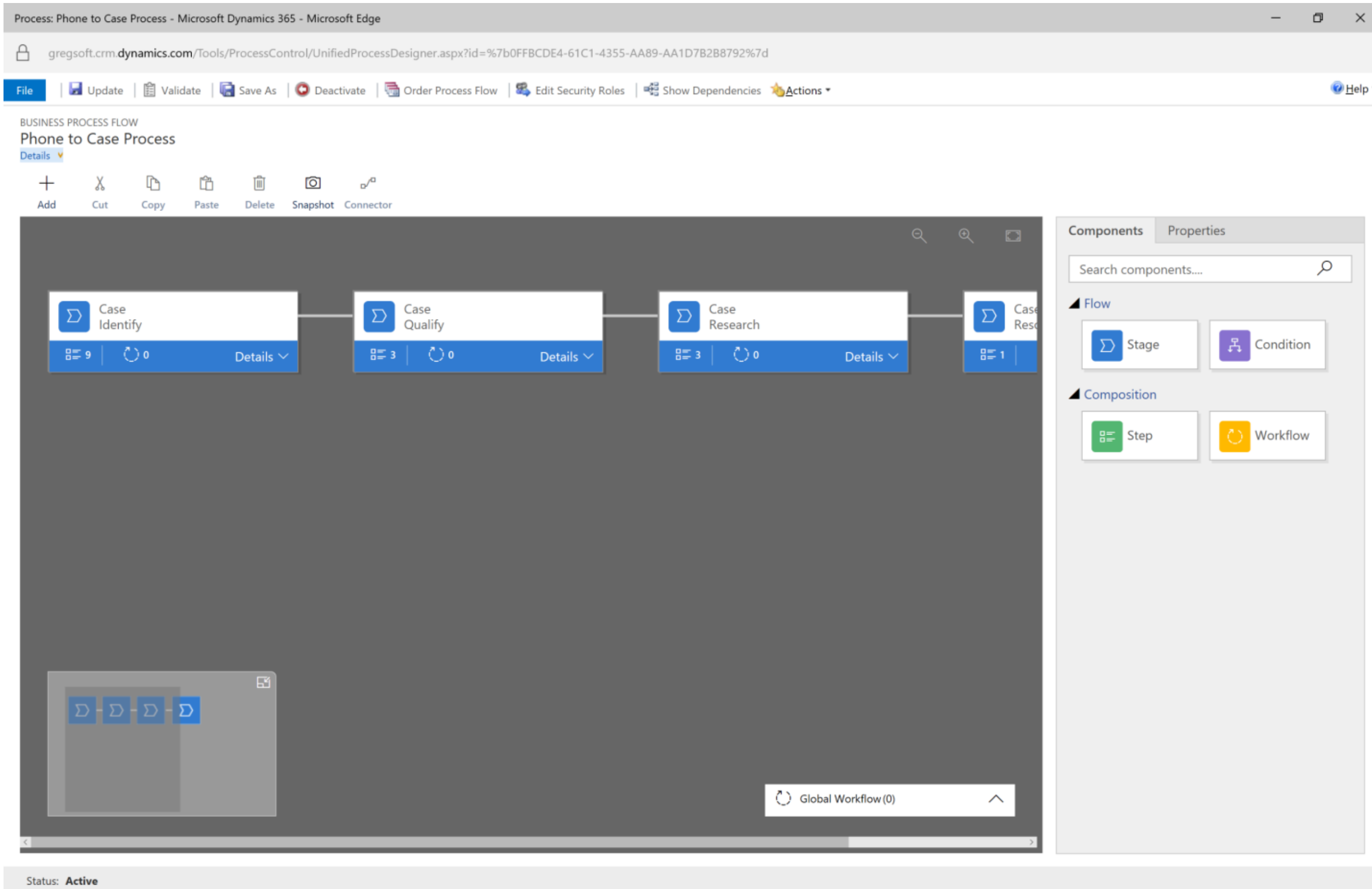
Sell this to a Customer! Check it!

* Not an exercise

1. 1 click the dots in the top right menu of your case, click 2 Process, and click 3 edit process to visit the new Process Explorer.



2. Brand new Process Explorer. **BAM!**
3. Look at it. The most up to date feature I've seen in Dynamics so far AND it uses the new 2017 Microsoft design Language. The same design that will one day be used with all of our partners :O!??!?!
4. Play around the explorer if you'd like before moving onto the next exercise.


Process: Phone to Case Process - Microsoft Dynamics 365 - Microsoft Edge
gregsoft.crm.dynamics.com/Tools/ProcessControl/UnifiedProcessDesigner.aspx?id=%7b0FFBCDE4-61C1-4355-AA89-AA1D7B2B8792%7d
File
Update
Validate
Save As
Deactivate
Order Process Flow
Edit Security Roles
Show Dependencies
Actions
Help
BUSINESS PROCESS FLOW
Phone to Case Process
Details
Add
Cut
Copy
Paste
Delete
Snapshot
Connector
Case Identify
Case Qualify
Case Research
Details
Components
Properties
Search components....
Flow
Stage
Condition
Composition
Step
Workflow
Global Workflow (0)
Status: Active


WHAT IS THIS?
A SALES GOAL FOR ANTS?!

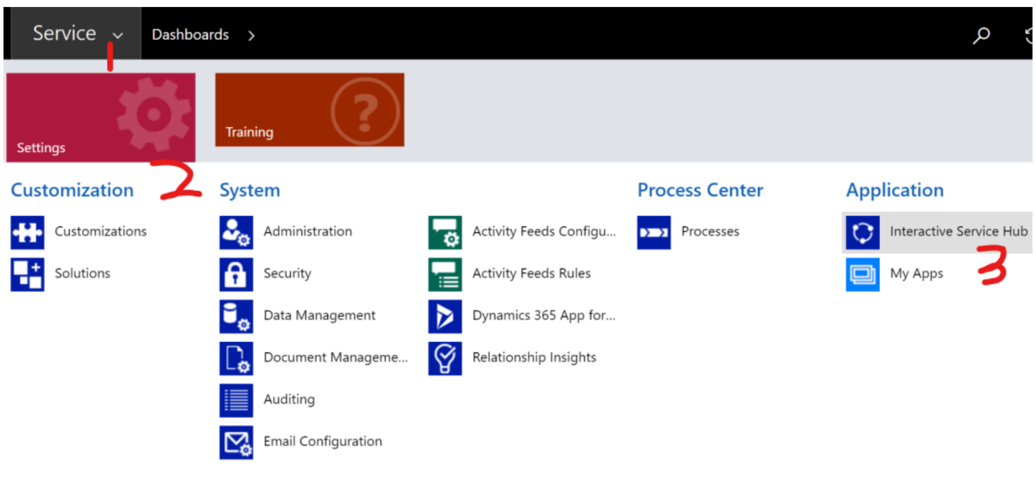
New Interactive Service Hub

What is it?

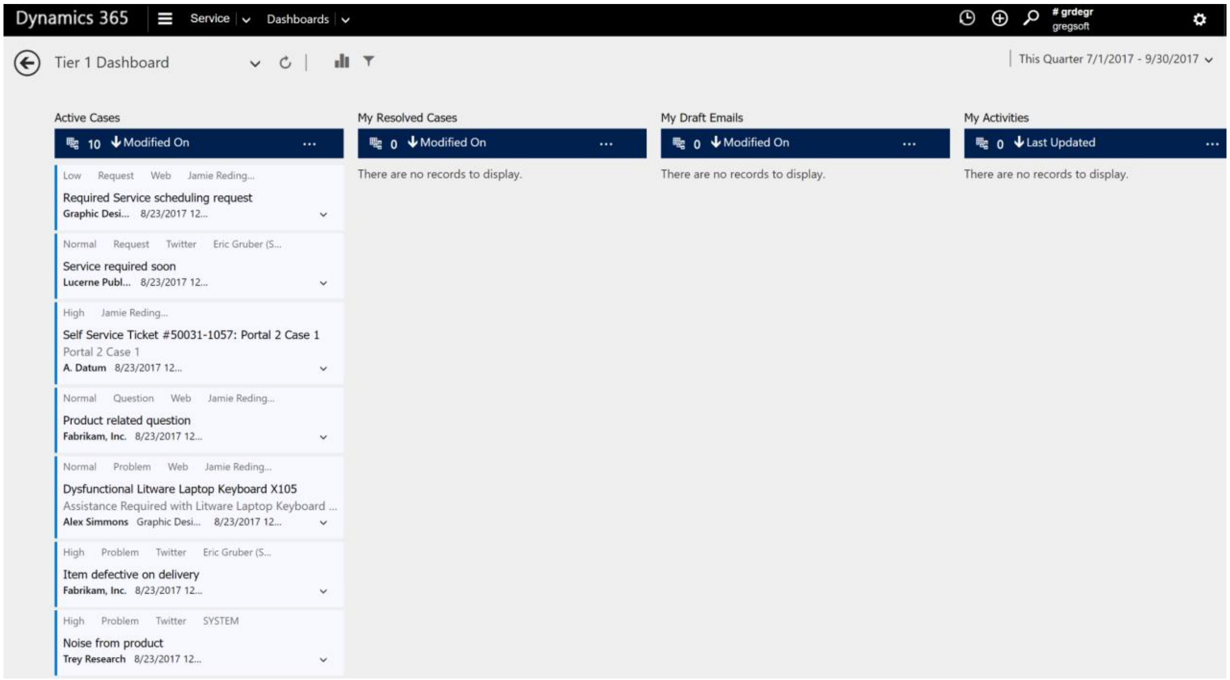
We bring to you a new intuitive and interactive experience for managing your customer service in the Dynamics 365 interactive service hub. It's loaded with richer dashboards and redesigned forms that pull together key information so you can focus on what's more important and get things done faster.

Getting to the Interactive Service Hub

1. Click the drop down arrow next to "**Services**" at 1, then click **Settings** at 2, and finally click **Interactive Service Hub** under "Application" at 3.



2. Great! You've made it to the New Interactive Service Hub.



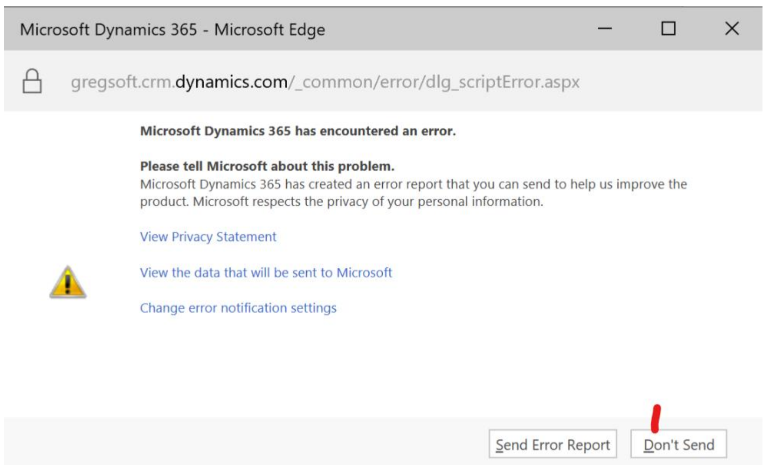
3. Next we'll go through Knowledge Articles (from my hands on work it seems like they can only be found in the Interactive Service Hub portal for some reason :/. So don't leave that page!

Capturing Knowledge Articles

What are they?

Turn your customer questions, issues, and feedback into knowledge articles, so other service reps can benefit from them. Add images and videos to your articles to explain things better and make the articles engaging.

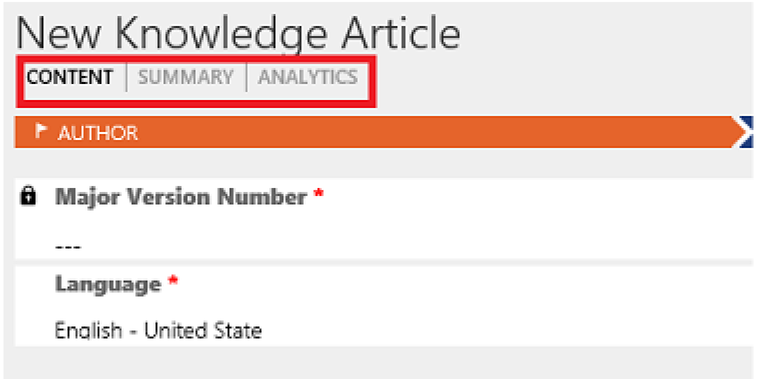
If at any point you see the dialog below, just hit **Don't Send** and continue with the exercise.



Making a Knowledge Article

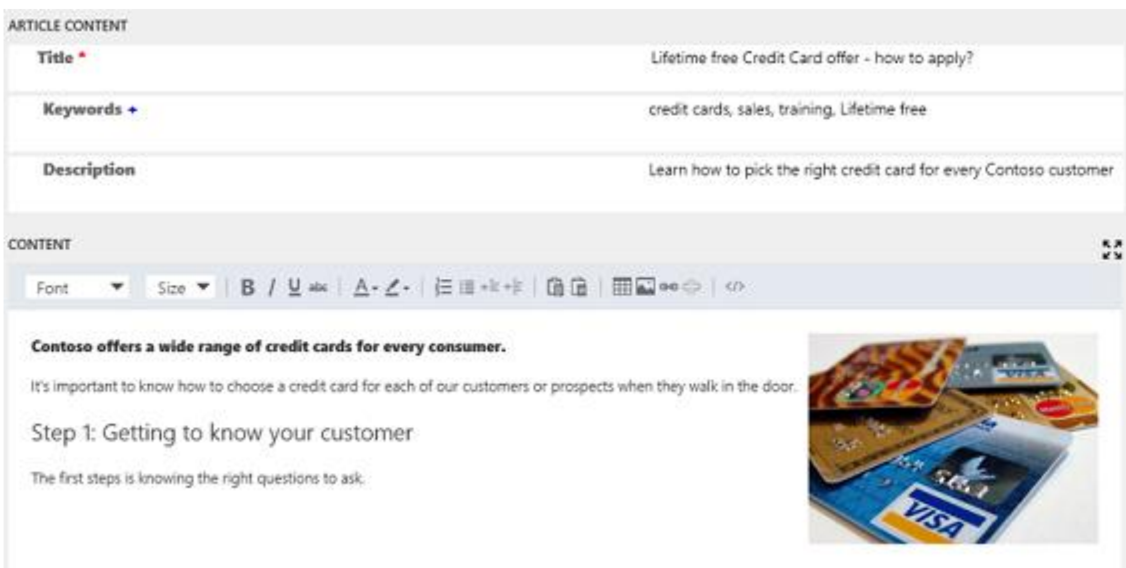
1. Make sure that you have Create and Read permissions on the Knowledge Article entity. By default, these permissions are added to the Knowledge Manager, Customer Service Manager, or Customer Service Representative role.
2. In the interactive service hub, go to **Service** > **Knowledge Articles**.
3. On the command bar, click **New**.

   You'll be on the **Content** tab of the knowledge article.



4. In the **Article Content** section, fill in the following details:

   - **Title**. Type a descriptive title that communicates the subject and purpose of the article in a concise manner.
   - **Keywords**. Type keywords for the article. These keywords are used for searching the knowledge base for articles. Separate keywords with commas.
   - **Description**. Type a short overview of the article. This appears in the search results and is used for search engine optimization.



5. In the **Content** section, add the content for your knowledge article.

Note

As soon as you click inside the editor space, the rich text editor command bar appears. Use the command bar options to format and style your content. More information: [Use the rich text editor to create knowledge articles and emails]

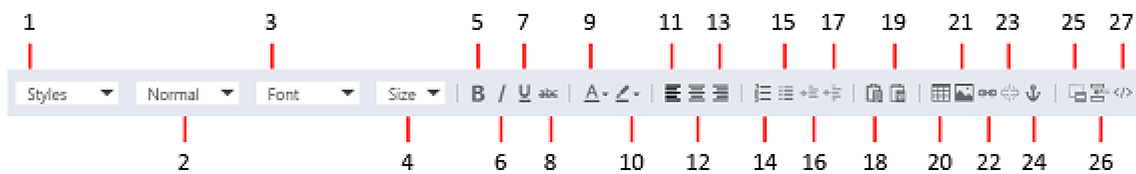
6. On the process bar, click **Author**.
7. In the **Article Subject** drop-down list, choose the subject of the article to help with article searches.
8. In the **Assign Primary Author** drop-down list, choose a person who is responsible for maintaining the article content. By default, the user who creates the article is the primary author.
9. When you're done adding the content, click **Save**.

   Posts about knowledge article-related activities will begin appearing in the **Timeline** section.

Use the rich text editor to create knowledge articles and emails

Create rich and well-formatted content for email or knowledge articles using the new rich text editor in the interactive service hub. The editor brings common word processor features like advanced styling, linking, find and replace, and insert images and tables.

You can choose a specific format or style for the content you're writing.



Command	Use
1. Formatting Styles	Apply predefined sets of formatting features to make it easier to keep the presentation of the text consistent. To make the choice easier, the style names are displayed in a style that they represent, giving you a preview of what the text will look like. **Note** This option is available in the expanded mode only.
2. Paragraph Format	Apply predefined block-level combinations of various formatting options. A paragraph format can only be applied to a block-level element, like a paragraph or a div element.

	Note This option is available in the expanded mode only.
3. Font Name	Choose a font for the selected text.
4. Font size	Choose a font size for the selected text.
5. Bold	Apply bold formatting to the selected text.
6. Italic	Apply italic formatting to the selected text.
7. Underline	Underline the selected text.
8. Strikethrough	Mark selected text for deletion.
9. Text Color	Choose a text color for the selected text.
10. Background Color	Choose a background color for the selected text.
11. Align Left	Left align the text. When you align your text left, the paragraph is aligned with the left margin and the text is ragged on the right side. **Note** This option is available in the expanded mode only.
12. Center	Center align the text. When you center align the text, the paragraph is aligned symmetrically along the vertical axis and the text is ragged on the both sides. **Note** This option is available in the expanded mode only.

13. Align Right	Right align the text. When you align your text right, the paragraph is aligned with the right margin and the text is ragged on the left side. **Note** This option is available in the expanded mode only.
14. Insert/Remove Numbered List	Create a numbered list.
15. Insert/Remove Bulleted List	Create a bulleted list.
16. Increase Indent	Increase the margin on the left side of text.
17. Decrease Indent	Decrease the margin on the left side of the text.
18. Paste as Plain Text	Paste the clipboard data as plain text, without the source formatting and styling.
19. Paste From Word	Paste content from Microsoft Office Word with the original content formatting. This will retain: • Spacing and line breaks • Ordered and unordered lists • Tables • Font styles and colors **Note** Images won't be copied from Word Microsoft Office Word.

20. Insert Table	Insert a table, and specify the table properties.
21. Image	Insert an image. 1. Choose Insert Image. 2. In the **Image Info** tab, specify the web address of the image, and also specify properties to define how the image will appear in the email or article. **Note** If the image is located on the external server, use the full absolute path. If the image is located on a local server, you can use a relative path. 3. If you want the image to be a clickable link, in the **Link** tab, add a URL for the image. You can also specify if you want the targeted page to open in a new window, topmost window, same window, or parent window. 4. To configure additional image options, use the **Advanced** tab. This is meant for advanced users with knowledge of HTML and CSS, and lets you change the presentation of the image. o **ID**. Type a unique identifier for an image element in the document (id attribute). o **Language Direction**. Choose the direction of the text. o **Language Code.** Type the language of the image element specified. o **Long Description URL**. Type the web address of an HTML page containing a longer description of the image. o **Stylesheet Classes**. Enter the class of the image element (class attribute). Note that an image element might be assigned more than one class. If this is the case, separate class names with spaces. o **Advisory Title**. Enter the text of the tooltip that is shown when the mouse cursor hovers over the image.

	○ **Style**. Enter the CSS style definitions. Note that each value must end with a semicolon and individual properties should be separated with spaces.
22. Link	Add clickable hyperlinks or email addresses to your documents. In the **Link** dialog box choose the type of link you'd like to insert. The **Link Info** tab allows you to choose the link type as well as set the link protocol and URL. The **Target** tab is only available for the URL link type. It specifies the location where the link will open after you click it.
23. Unlink	When you place the cursor on a link, the **Unlink** button on the toolbar becomes active. Click the button to remove the link and make it plain text.
24. Anchor	You can add anchors in document text. After you add anchors, you can link to these anchors for easier navigation. To add an anchor: 1. Place the cursor where you want to insert an anchor, and then on the toolbar, click the **Anchor** button. The **Anchor Properties** dialog box opens. 2. Ente a name for the anchor, and then click **OK**. The **Anchor** button appears in the area where you created the anchor. You can now use the **Link** button to link to your anchor.
25. Embed Media	To embed videos into your content: 1. Place the cursor where you want to insert the video, and then on the toolbar, click the **Embed Media** button. The **Embed Video** dialog box opens. 2. Enter the embed link of the video provided by the video hosting provider, and then click **OK**.
26. Create Div Container	Create a div container to apply formatting to a larger document fragment that extends beyond one block.

	The **General** tab lets you manually add a stylesheet class that is applied to the div element. The **Advanced** tab lets you configure additional div element options such as assigning it an ID, a language code, a text direction, an advisory title, or CSS style properties. **Note** This option is available in the expanded mode only.
27. Source	Open the HTML source code for the content. To embed videos and IFrames, video and iframe tags can be used in HTML source code mode.

Important

You can’t use client-side code (script tags or JavaScript) in articles and emails. If you want to associate CSS or JavaScript, use web resources.

Don’t forget these Links 🔗

- Home Page for all Dynamics 365 Enterprise Edition Docs (https://docs.microsoft.com/en-us/dynamics365/#pivot=main&panel=enterprise)

- User Guide (https://www.microsoft.com/en-us/dynamics/crm-customer-center/dynamics-365-for-customer-service-user-s-guide.aspx)
    - *** ALL of the information in this walkthrough was pulled through the user guide. This is the same guide partner’s, PTS, CSA, & PTA teams should reference to troubleshoot issues in doing all the things in D365.**

- Everyone love’s Pitch Decks (https://microsoft.sharepoint.com/sites/infopedia/Media/details/AEVD-3-114282)
    - This is where I captured the 5 guiding principles.