

DYNAMICS 365 CASE MANAGEMENT

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But first a little bit about us.....

Microsoft
Partner | Silver Cloud Customer Relationship Management
Silver Small and Midmarket Cloud Solutions



- Dynamics 365 Cloud Customer Relationship Management – Silver 2012 - present
- 15 years experience working with small to mid-sized businesses to modernize sales, marketing, and customer service
- Work with companies throughout the US and Canada
- Primary focus is on Cloud-based Dynamics 365 Customer Engagement Platform
- Premier provider of low-cost fixed fee support services for Dynamics 365, Power Apps, and Power Automate

WHY MANAGE CUSTOMER SERVICE IN DYNAMICS 365



Cases
Entitlements
Service Level
Agreements
Knowledgebase
Dashboards

COMPONENTS OF DYNAMICS 365 CUSTOMER SERVICE

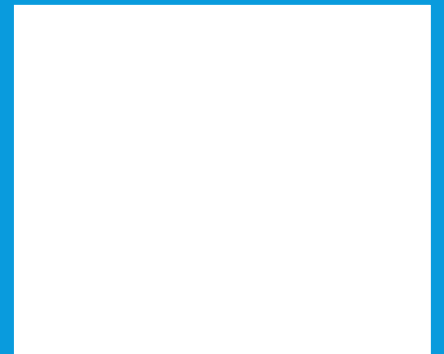
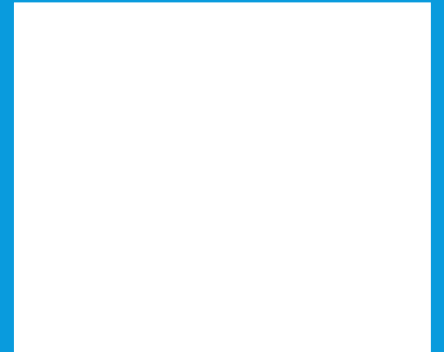
Cases

Entitlements

Service Level Agreements

Knowledgebase

Dashboards



MANAGING CASES

- Creating NEW cases
- Cases can be created from within Dynamics 365 by navigating to Cases OR from an account/contact
- Can be converted from an email in Outlook
- Through a Power Apps Support Portal
- From an email sent to a support mailbox
- Automated Responses to acknowledge case creation/completion
- Assignment Rules add cases to queues based on case subject – allow you to get the right person on the case

KNOWLEDGEBASE

- Create detailed graphics enhanced documents to explain a process, answer FAQs or explain issues
- KB articles have an approval process, and technicians can offer feedback make comments, "Like" articles
- Customers can receive KB Articles from emails or via a Power Platform Customer Service portal

We value customer service above all else, so we provide multiple options for shipping. Customers can expect fast and easy shipping for all products. We also provide free returns at any time.

Shipping Options

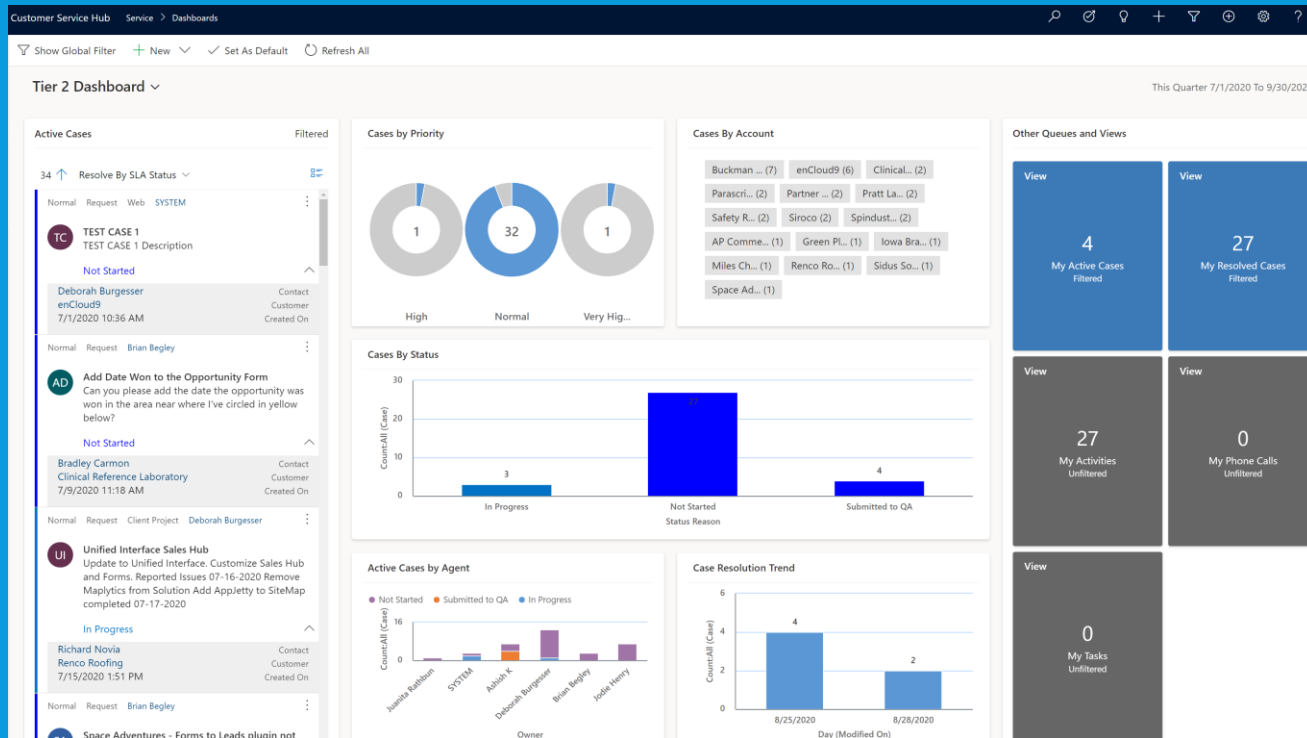
Free Shipping	7 - 10 business days
Standard Shipping	3 - 7 business days
Expedited Shipping	2 - 5 business days
Express Shipping	1 business day

ENTITLEMENTS

- Entitlements are a way of managing Customer Support
- Create a time period based agreement to provide support based on
 - Number of incidents – 10 phone calls per year
 - Number of hours – 100 hours per month
 - Period of time – Unlimited for a year!
- Entitlements can be used for warranties, can be linked to a specific product or a number of products
- Entitlements can be renewed – Creating a sales opportunity for your sales team

DASHBOARDS AND ANALYTICS

Quickly understand Customer service trends using the pre-built case management dashboards.



Next steps and resources

- Contact at enCloud9 with any questions
- sales@encloud9.com
- Sign up for our September 18 webinar
- <https://attendee.gotowebinar.com/register/2271272570854816524>

Webinar

10 DYNAMICS
365 BEST
PRACTICES

SEPTEMBER 18
1 PM CT



Register

Resources

enCloud9 Blog

<https://www.encloud9.com/blog/user-experience-made-easier-with-enhanced-filtering/>

Microsoft Docs

Overview of Customer Service

<https://docs.microsoft.com/en-us/dynamics365/customer-service/overview>