

## Case Creation

- After the support agent receives the support request, he starts to create the case and fill in the application fields.

*NB.: 'Customer' field is the customer's account, and the 'Contact' field is the person who sent/requested the support case which should be under the customer's account.*

The screenshot shows the Dynamics 365 'New Case' form. The top navigation bar includes 'Dynamics 365', 'Service', and 'Cases > New Case'. The form is divided into three main sections: 'Defining (Active)', 'Handling', and 'Resolving'. The 'Defining' section includes fields for 'Customer' (Link Development), 'Contact' (Carlo Francesco), 'Case Title' (Delivery Issue), and 'Assigned to' (Mohamed Samir). The 'Handling' section includes fields for 'Case Origin', 'Case Type', 'Status Reason', 'Phone', 'Problem', and 'In Progress'. The 'Resolving' section includes a 'Priority' field set to 'High'. Below these sections is a 'General' section with 'CASE DETAILS' (Case Title, Customer, Contact, ID) and a 'DESCRIPTION' field containing the text 'We didn't receive the shipment on the agreed time.' There is also a 'First Response Sent' field set to 'No'. At the bottom, there are tabs for 'POSTS', 'ACTIVITIES', 'KB RECORDS', and 'NOTES', with a 'Delayed' status indicator.

## Creation Auto-Notification

- After filling-in all the case fields and pressing save the system will automatically send two notification mails regarding a created case, one to be sent to the client, contains the case number and other case related basic data. The other one to be sent to the Support Team/Agent contains case number, case URL & other case related basic data.

*Automated creation Email to the Client*



Notification Support <king@st8.onmicrosoft.com>

Link Development Support | SR# LD-00019-Q7G8 CRM:0001044

3:12 PM



Dear Valued Customer,

Thank you for using Link Development products and support services. Please be noted that a new request has been created with the below data:

- Service Request #: LD-00019-Q7G8
- Service Request Title: Delivery Issue


One of our support team will follow up with you soon within the agreed SLA according to our support Policy.

Our Working Hours: Sun - Thu 9:00 AM - 5:00 PM (GMT+2).

For our support policy please [Click Here](#).

This is an Automated Sent E-Mail. you don't need to reply to it.


*Automated creation Email to the Support Team/Agent*



Notification Support <king@st8.onmicrosoft.com>

SR Created | LD-00019-Q7G8 | Delivery Issue CRM:0001045

3:13 PM



SR Created..

Please be noted that a new request has been created with the below data:

- Service Request #: LD-00019-Q7G8
- Service Request Title: Delivery Issue
- Customer: Link Development
- Contact Name: Carlo Francesco
- Created on: 1/24/2017 3:11 PM (GMT+2)
- Priority: High
- URL: [Click Here](#)

This is an Automated Sent E-Mail. you don't need to reply to it.

#### Closure Auto-Notification:

- The solution provides you with multiple closing (Resolving) reasons to choose the most suitable one when resolving the case. After the case is resolved 3 mails will be automatically sent by the system as following:
  - Closure confirmation to the client.

- Closure confirmation to the Support Team/Agent.
- Survey mail to the client.

*Automated Closure Email to the client*



Notification Support <king@st8.onmicrosoft.com>

3:26 PM

**Link Development Support | Case Closure Confirmation | SR# LD-00019-Q7G8 CRM:0...**

Dear Valued Customer,

Thank you for using Link Development products and services, we appreciate your business. This email is to confirm that your support case has been closed, the details of the service request case are as follows:

- Service Request #: LD-00019-Q7G8
- Service Request Title: Delivery Issue
- Closed Date: 1/24/2017 3:25 PM (GMT+2)

Thank you for contacting Link Development support team, your satisfaction is our goal.

Regards,  
Link Development Support Team

This is an Automated Sent E-Mail. you don't need to reply to it.

*Automated closure Email to the Support Team/Agent*



Notification Support <king@st8.onmicrosoft.com>

3:26 PM

**SR Closed | LD-00019-Q7G8 | Delivery Issue CRM:0001049**

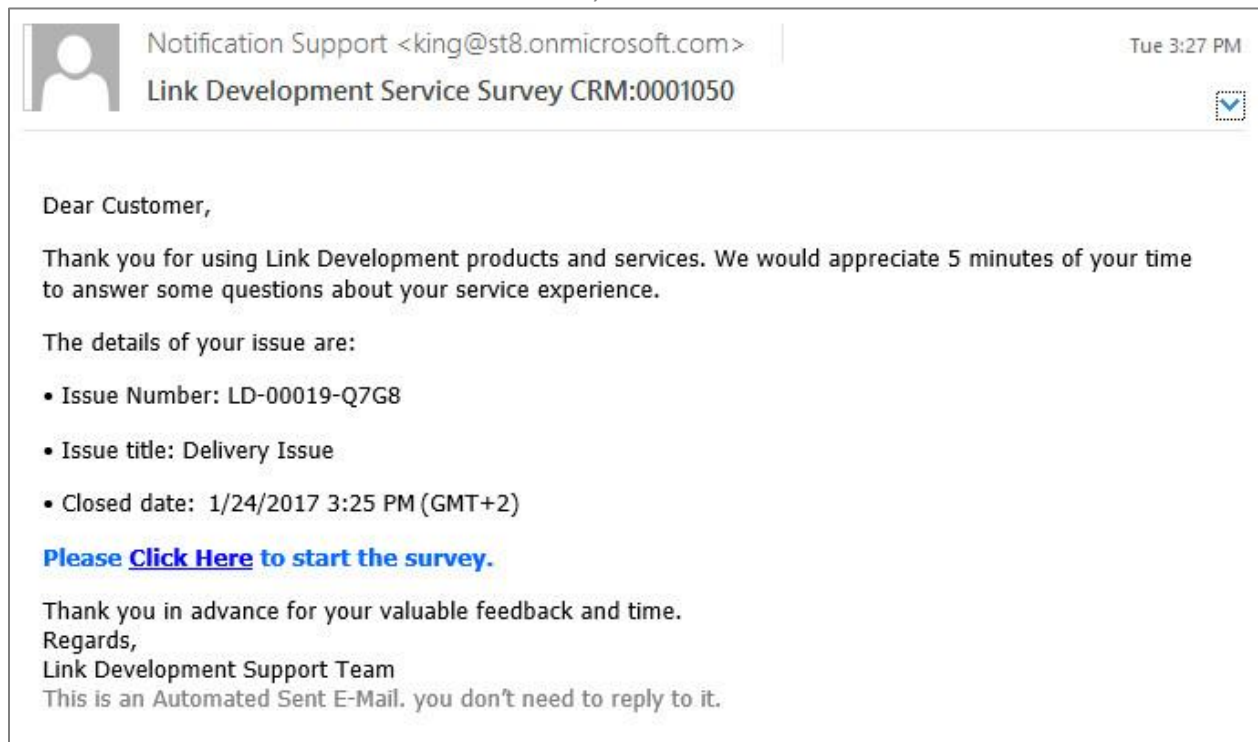
SR Closed..

This email is to confirm that the below support case has been closed:

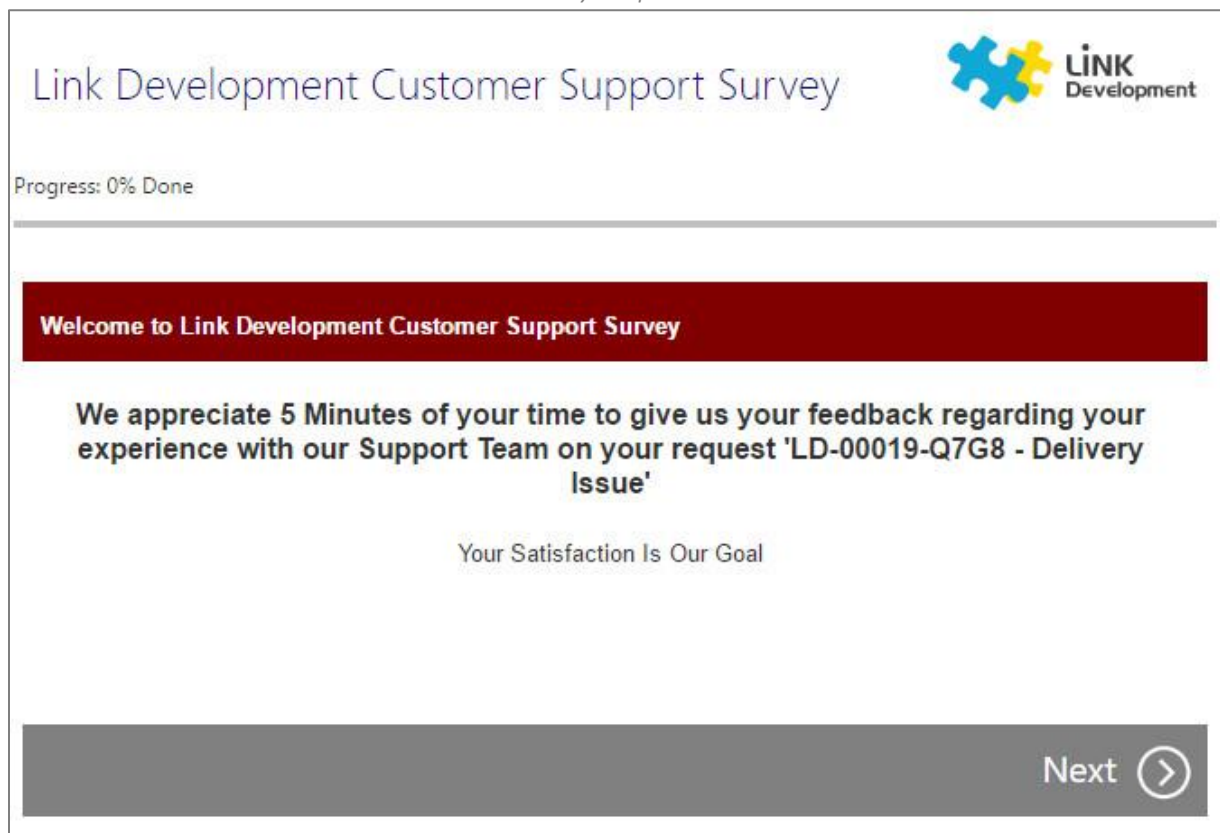
- Service Request #: LD-00019-Q7G8
- Service Request Title: Delivery Issue
- Customer: Link Development
- Created On: 1/24/2017 3:11 PM (GMT+2)
- Closed Date: 1/24/2017 3:25 PM (GMT+2)
- URL: [Click Here](#)

This is an Automated Sent E-Mail. you don't need to reply to it.

Automated survey Email to the client




Survey Sample 1



Survey Sample 2

# Link Development Customer Support Survey



Progress: 13% Done

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## Contact Methods

How do you prefer to contact Link Dev. Support team?

\*

☐ Link Dev. support section in your Dynamic CRM

☒ Direct Mailing

☐ Phone Call

☐ Other

Previous

Next

Survey Sample 3

## Link Development Customer Support Survey



Progress: 38% Done

**In a scale of 1 - 5 please rate the following**

The duration for solving your issue or answering your inquiry.

\*

Very bad

1

2

3

4

5


Very good

Previous

Next

Survey Sample 4

## Link Development Customer Support Survey



Progress: 88% Done

**Suggestions**

Please share any additional comments about your experience with Link Development support team or suggestions on how we can better improve our support services.

Previous

Submit

## Survey Sample 5

Link Development Customer Support Survey

Progress: 100% Done

**Survey Completed Successfully**

**Thank you Carlo Francesco for taking the time to tell us about your experience with Link Development Support Team.**

**We Appreciate Your Feedback**

## Case First Response Success/Failure:

- When a case is submitted the 'First Response' SLA timer starts counting to maintain the level of the time taken until the first response to the case. Noting that the Warning/Failure time changes according to the case priority. (SLA timer considers off days & Public holidays previously set into the system).
- The below is the \*\*default Warning/Failure 'First Response' time according to priority:

Priority	Warning Time	Failure Time
High	1 Hour	2 Hours
Normal	6 Hours	8 Hours
Low	8 Hours	16 Hours

*\*\*Timers can be changed through Settings > Service Management > Support SLA*

## First Response Timer

Defining (Active) Handling

Customer \* Link Development Created By Mohamed Samir Case Origin \* Facebook  
 Contact \* Carlo Francesco Created On 1/26/2017 11:54 AM Case Type \* Problem  
 Case Title \* Missing Package Assigned to \* Mohamed Samir Status Reason In Progress  
 Priority \* High

Customer Support Workflow Next Stage ➔

**General**

**CASE DETAILS**

Case Title \* Missing Package DESCRIPTION --  
 Customer \* Link Development  
 Contact \* Carlo Francesco  
 ID LD-00020-H6Q1

First Response Sent No  
 First response in 0h 4m 35s

- In both cases of 'First Response' SLA Warning and Failure, an automated mail is sent to the Support Team/Agent.



*First Response Warning Automated Email*



Notification Support <king@st8.onmicrosoft.com>

SR High Priority SLA Warning | LD-00020-H6Q1 | Missing Package CRM:0001053

11:58 AM

**SR SLA Warning..**

This email is to notify that the below support case is about to break 'first response SLA':

- Service Request #: LD-00020-H6Q1
- Service Request Title: Missing Package
- Customer: Link Development
- Created on: 1/26/2017 11:54 AM
- Priority: High
- URL: [Click Here](#)

This is an Automated Sent E-Mail. you don't need to reply to it.

*First Response Failure Automated Email*



Notification Support <king@st8.onmicrosoft.com>

SR High Priority SLA FAILED | LD-00020-H6Q1 | Missing Package CRM:0001054

12:00 PM

**SR SLA FAILED !**

This email is to notify that the below support case has failed 'first response SLA':

- Service Request #: LD-00020-H6Q1
- Service Request Title: Missing Package
- Customer: Link Development
- Created on: 1/26/2017 11:54 AM
- Priority: High
- URL: [Click Here](#)

This is an Automated Sent E-Mail. you don't need to reply to it.

- In case of failing to meet the 'First Response' SLA time the case status will be changed to 'Delayed' and the field 'first response' under 'Delayed' system will be updated to 'Yes'. Also the case priority cannot be changed once the 'First response' SLA fails.



First Response Failure Actions

CASE  
Missing Package

Priority: High  
Created On: 1/26/2017 11:54 AM  
Status: Delayed  
Owner: Mohamed Samir

Defining (Active for 9 minutes)

Customer: Link Development  
Contact: Carlo Francesco  
Case Title: Missing Package

Created By: Mohamed Samir  
Created On: 1/26/2017 11:54 AM  
Assigned to: Mohamed Samir

Case Origin: Facebook  
Case Type: Problem  
Status Reason: Delayed

Customer Support Workflow (Active for 9 minutes) Next Stage

CASE DETAILS

Case Title: Missing Package  
Customer: Link Development  
Contact: Carlo Francesco  
ID: LD-00020-H6Q1

DESCRIPTION

First Response Sent: No  
First response in: Canceled

Delayed

First Response: Yes

- To meet the success criteria of the 'First Response' SLA, the agent should - after responding to the customer - set 'First Response Sent' field to 'Yes' or close the case as 'Resolved' with a suitable closing reason.

## Case Statuses

- In Progress:**  
Case in the 'First Response' stage.
- On Hold:**  
Case progress is paused due to any internal reasons.
- Waiting for details:**
  - When the case is pending on a required information or data from the client side and we have notified him and waiting his response.
  - When the case is on 'Waiting for details' status a timer will starts counting as below:

Status	Timer	
	Warning	Failure
Waiting for Details	5 Days	7 Days

- After 5 days, an Automated Email will be sent to the Support Team/Agent to send a reminder to the client using a specific Template number.
  - 2 days later (7 days from status change incident), the case will be considered as solved and will be closed with 'Problem Solved' status. A notification will be sent to the Support Team/Agent that this case has failed in 'Waiting for Details' SLA and the rest of the automated closure process will proceed.
  - To stop the 'Waiting for Details' timer, the case status should be changed to any other status.
- Researching:**
  - Represents that the case is being investigated and handled by the technical team.
  - When the case is on 'Researching' status a timer will starts counting as below:

Status	Timer	
	Warning	Failure
Researching	1 Day	2 Days

- After 1 Day an automated warning Email will be sent to the Support Team/Agent.
- 1 day later (2 days from status change incident) an automated failure Email will be sent to the Support Team/Agent. And the field 'researching' under 'Delayed' section will be updated to 'Yes'.

Researching SLA Failure

Customer: [Link Development](#)

Contact: [Carlo Francesco](#)

ID: [LD-00020-H6Q1](#)

**Delayed**

First Response: [--](#)

**Researching** [Yes](#)

- **Pending Closure:**  
When we send an Email to the client asking him to close a ticket after it got resolved, we set the case status to 'Pending Closure'. Which closes the case automatically as 'Problem Solved' after 1 day. Timer can be stopped by changing the case status.
- **Delayed:**  
It represents that the case has broken the 'First Response' SLA.

### Automated Notes (Logs)

The system automatically logs 'Notes' in case of any of the below changes:

- Priority change.
- Case owner changed (reassigned).
- 'First Response Sent' field change.
- 'Status Reason' change.
- Any SLA failure (Waiting for details, First response and Researching).
- Case closed by 'Pending Closure'.

Automated Notes Sample

POSTS ACTIVITIES KB RECORD **NOTES**

Enter a note

**SYSTEM: Case Status set to 'Delayed'**  
Case Status set to 'Delayed' by 'Mohamed Samir'.  
Mohamed Samir - Today 11:59:44 AM

## Predefined Email Templates

- The solution is provided with multiple useful predefined Email templates that can be used in contacting clients.
- The automated emails' titles contains the phrase 'Auto-mail' that refers that it's in use by one of the system's processes.
- The included Email templates are 'Related to Case' only.
- Any changed to the 'Dynamic data' values inserted into the main Email templates could lead to malfunctioning in these templates.
- In the main Email templates which can be found in Settings > Templates > Email templates all the values in 'Red' should be changed manually by the sender to the appropriate data.
- All the Email templates can be modified from Settings > Templates > Email Templates.

Email Templates Sample 1

EMAIL ▾

New Email

Priority  
Normal

From: Mohamed Samir  
To: Carlo Francesco  
Cc: --  
Bcc: --  
Subject: [SR# LD-00020-H6Q1] Missing Package

Hello Customer Name,

Thank you for contacting Link Development Support. My name is Agent Name. I am the Support Professional who will be working with you on this Service Request. You may reach me using the contact information listed below, referencing the SR # LD-00020-H6Q1.

Your case is currently under investigation and we will feed you back soon.

If you have any questions or concerns, please let me know.

Email Templates Sample 2

<div>  New              Run Workflow...            Start Dialog           More Actions ▾         </div>						
✓ Title ↑	Template Type	Viewable By	Language	Reply Rate	Open Rate	Sent en
09. Agent Following Up - Case in Progress (Researching)	Case	Organization	English(1033)			
✓ 10. Resolution Procedure - Scope Agreement	Case	Organization	English(1033)			
11. Requesting CST Approval - Case in Progress	Case	Organization	English(1033)			
12. Financial Payment Proof - Escalation	Case	Organization	English(1033)			
13. Successful Payment Confirmation - Case Solved - 24 H...	Case	Organization	English(1033)			
14. Payment Failed - Financial Team Checking	Case	Organization	English(1033)			
15. Manager Following Up - Solved Case - Waiting CST C...	Case	Organization	English(1033)			
50. Auto-Mail - Case Closed - Confirmation - Client	Case	Organization	English(1033)			
51. Auto-Mail - Case Closed - Confirmation - Support Team	Case	Organization	English(1033)			
52. Auto-Mail - Case Closed - Survey Request - Client	Case	Organization	English(1033)			
53. Auto-Mail - Case Created - Confirmation - Client	Case	Organization	English(1033)			
54. Auto-Mail - Case Created - Notification - Support Team	Case	Organization	English(1033)			

### Important notes

- This solution is compatible with Dynamics 365 (8.2) and it could not operates properly on older environments.
- The solution is developed to operate on environments using 'English' language interface.