

Dynamics 365 for BPO

The Solution is designed to address most of the day to day process functionalities in case management of D365

MICROSOFT LABS

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1. Overview

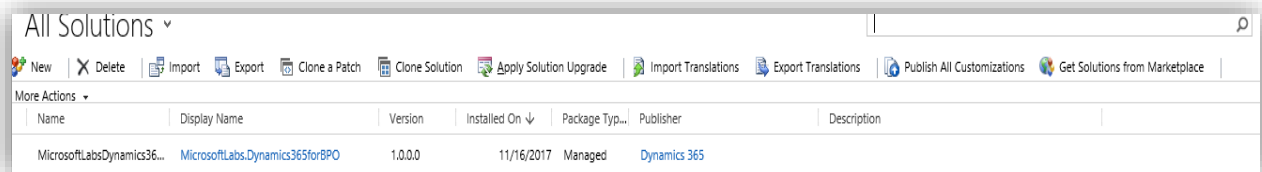
The Dynamics 365 for BPO Solution is designed to add more capabilities to an existing case management for the customers. This solution will provide the additional functionalities like escalate a case, put a case on custom hold status (Internal, 3rd Party and Customer), Automatic creation of child case on 3rd Party Hold status, define SLA of a case, Convert to Case from an incoming email and Email validations in Case management. All these functionalities are described through this guide with configuration and user experience.

This solution also includes Attachment Management, Actionable Audit, Email Alert, Email Machine Learning and Speech To Text. Individual solution user guides links are provided in this document for reference.

2. How to Verify the Solution after Installation?

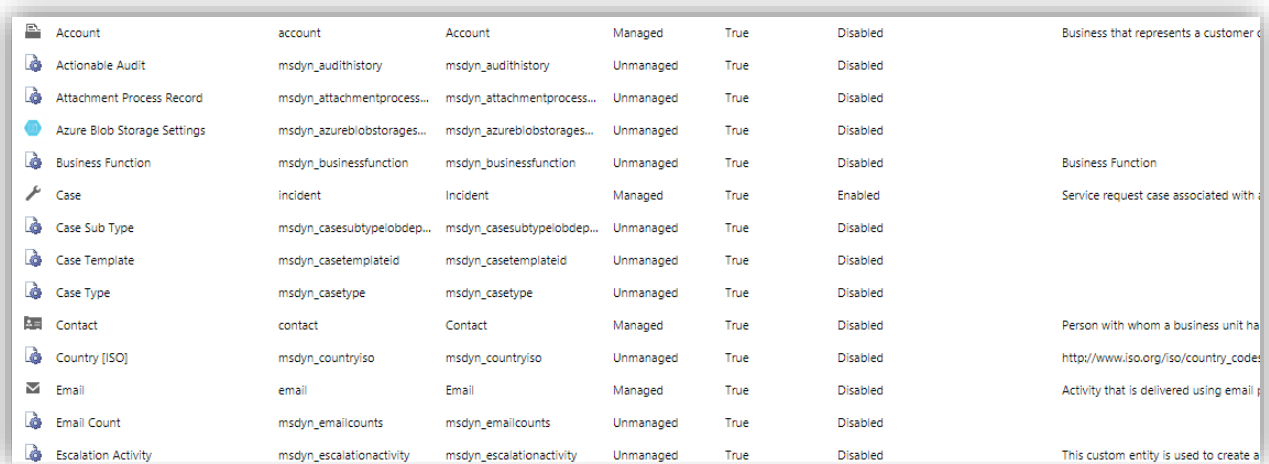
After downloading the solution from <https://appsource.microsoft.com/en-us> , solution looks like below

Solution:

















Name	Display Name	Version	Installed On	Package Type	Publisher	Description
MicrosoftLabs.Dynamics365forBPO	MicrosoftLabs.Dynamics365forBPO	1.0.0.0	11/16/2017	Managed	Dynamics 365	



Below are the custom entities:



Entity Name	Entity Type	Entity Set Name	Entity Set Name	Entity Set Name	Entity Set Name	Entity Set Name	Entity Set Name
Account	account	Account	Managed	True	Disabled		Business that represents a customer
Actionable Audit	msdyn_audithistory	msdyn_audithistory	Unmanaged	True	Disabled		
Attachment Process Record	msdyn_attachmentprocess...	msdyn_attachmentprocess...	Unmanaged	True	Disabled		
Azure Blob Storage Settings	msdyn_azureblobstorages...	msdyn_azureblobstorages...	Unmanaged	True	Disabled		
Business Function	msdyn_businessfunction	msdyn_businessfunction	Unmanaged	True	Disabled		Business Function
Case	incident	Incident	Managed	True	Enabled		Service request case associated with
Case Sub Type	msdyn_casesubtypelobdep...	msdyn_casesubtypelobdep...	Unmanaged	True	Disabled		
Case Template	msdyn_casetemplateid	msdyn_casetemplateid	Unmanaged	True	Disabled		
Case Type	msdyn_casetype	msdyn_casetype	Unmanaged	True	Disabled		
Contact	contact	Contact	Managed	True	Disabled		Person with whom a business unit ha
Country [ISO]	msdyn_country/iso	msdyn_country/iso	Unmanaged	True	Disabled		http://www.iso.org/iso/country_codes
Email	email	Email	Managed	True	Disabled		Activity that is delivered using email
Email Count	msdyn_emailcounts	msdyn_emailcounts	Unmanaged	True	Disabled		
Escalation Activity	msdyn_escalationactivity	msdyn_escalationactivity	Unmanaged	True	Disabled		This custom entity is used to create a

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	Escalation Mapping	msdyn_escalationmapping	msdyn_escalationmapping	Unmanaged	True	Disabled	This entity is used to configure the escalation mapping wi.
	Hold Activity	msdyn_holdactivity	msdyn_holdactivity	Unmanaged	True	Enabled	
	Hold Activity Reasons	msdyn_holdactivityreasons	msdyn_holdactivityreasons	Unmanaged	True	Disabled	
	Hold Reason	msdyn_holdreason	msdyn_holdreason	Unmanaged	True	Disabled	
	Line of Business	msdyn_lineofbusiness	msdyn_lineofbusiness	Unmanaged	True	Disabled	
	NotesAttachmentEntitySetting	msdyn_notesattachmen...	msdyn_notesattachmen...	Unmanaged	True	Disabled	
	Out Of SLA Reason	msdyn_outofslareason	msdyn_outofslareason	Unmanaged	True	Disabled	
	Out Of SLA Sub Reason	msdyn_outofslasubreason	msdyn_outofslasubreason	Unmanaged	True	Disabled	
	Product	product	Product	Managed	True	Disabled	Information about products and their pricing information.
	Program	msdyn_program	msdyn_program	Unmanaged	True	Disabled	
	Reason	msdyn_reasonindependent	msdyn_reasonindependent	Unmanaged	True	Disabled	
	Root Cause	msdyn_rootcause	msdyn_rootcause	Unmanaged	True	Disabled	
	Speech To Text Entity Configuration	msdyn_speechtotextentity...	msdyn_speechtotextentity...	Unmanaged	True	Disabled	
	Speech To Text Global Configuration	msdyn_speechtotextglobal...	msdyn_speechtotextglobal...	Unmanaged	True	Disabled	

	Sub Reason	msdyn_subreasonindepende...	msdyn_subreasonindepende...	Unmanaged	True	Disabled	
	User	systemuser	SystemUser	Managed	True	Disabled	

Below are the plug-in assemblies:

MicrosoftLabs.ActionableAudit	1.0.0.0	neutral	2954010b1278a799	Sandbox	10/26/2017 11:3...	11/15/2017 3:38...
MicrosoftLabs.AttachmentManagement.Plugins	1.0.0.0	neutral	535de8cd49e5d642	Sandbox	10/6/2017 10:40...	11/15/2017 3:38...
MicrosoftLabs.Dynamics365forBPO	1.0.0.0	neutral	d7d4abb0e59c025f	Sandbox	11/16/2017 2:20...	11/16/2017 2:20...
MicrosoftLabs.EmailAlert	1.0.0.0	neutral	ce5e78260a69a84d	Sandbox	10/26/2017 11:3...	11/15/2017 3:38...
MicrosoftLabs.EmailTextAnalytics.Workflow	1.0.0.0	neutral	9e1f264d29e4a709	Sandbox	10/26/2017 11:3...	11/15/2017 3:38...

Below are the web resources:

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/Images/Microphone_16x16.png	msdyn_/Images/Micropho...	PNG format	Unmanaged	True	
/Images/Microphone_32x32.png	msdyn_/Images/Micropho...	PNG format	Unmanaged	True	
/Images/Microphone_Filled_16x16.png	msdyn_/Images/Micropho...	PNG format	Unmanaged	True	
/Images/Microphone_Filled_32x32.png	msdyn_/Images/Micropho...	PNG format	Unmanaged	True	
/Scripts/Shell.js	msdyn_/Scripts/Shell.js	Script (JScript)	Unmanaged	True	English(1033)
Attachment JQuery	msdyn_query_2.2.1.min.js	Script (JScript)	Unmanaged	True	English(1033)
attachmentlogo	msdyn_attachmentlogo	ICO format	Unmanaged	True	
Audit History	msdyn_audithistory	Webpage (HTML)	Unmanaged	True	English(1033)
Azure Attachment Reporting	msdyn_azureAttachmentR...	Webpage (HTML)	Unmanaged	True	English(1033)
Azure Attachment Storage Configura...	msdyn_azureAttachmentC...	Webpage (HTML)	Unmanaged	True	English(1033)
AzureBlobStorageSetup32	msdyn_AzureBlobStorageS...	ICO format	Unmanaged	True	English(1033)
azurestorage_updated	msdyn_AzureStorage_Upd...	ICO format	Unmanaged	True	
azurestorage32X32_updated	msdyn_AzureStorage32X3...	ICO format	Unmanaged	True	
Busy Indicator	msdyn_busy_indicator	GIF format	Unmanaged	True	English(1033)
CaseTimeLine.html	msdyn_caseTimeLine.html	Webpage (HTML)	Unmanaged	True	English(1033)

Delete Icon	msdyn_deletelcon	PNG format	Unmanaged	True	English(1033)
Download Icon	msdyn_DownloadIcon	PNG format	Unmanaged	True	English(1033)
dummyfile	msdyn_dummyfile	Webpage (HTML)	Unmanaged	True	English(1033)
Emoticon faces	msdyn_emoticonBasic	PNG format	Unmanaged	True	English(1033)
Emoticon Happyface	msdyn_emoticonHappy	PNG format	Unmanaged	True	English(1033)
Emoticon Okface	msdyn_emoticonOk	PNG format	Unmanaged	True	English(1033)
Emoticon Sadface	msdyn_emoticonSad	PNG format	Unmanaged	True	English(1033)
Emoticon Satisfiedface	msdyn_emoticonSatisfied	PNG format	Unmanaged	True	English(1033)
Files and Attachments	msdyn_filesandattachments	Webpage (HTML)	Unmanaged	True	English(1033)
FromFieldScript	msdyn_fromfieldscript	Script (JScript)	Unmanaged	True	
Grid	msdyn_grid	Script (JScript)	Unmanaged	True	English(1033)
jquery_1.9.1.min	msdyn_jquery_1.9.1.min	Script (JScript)	Unmanaged	True	
json2	msdyn_json2	Script (JScript)	Unmanaged	True	
msdyn_accountResources.js	msdyn_accountResources.js	Script (JScript)	Unmanaged	True	This script is used to open the search URL when clicking o... English(1033)
msdyn_autoactivityclose.js	msdyn_autoactivityclose.js	Script (JScript)	Unmanaged	True	Auto Close the Activity based on close date provided English(1033)

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msdyn_commonResources.js	msdyn_commonResources.js	Script (JScript)	Unmanaged	True	Common Resources	English(1033)
msdyn_constants.js	msdyn_constants.js	Script (JScript)	Unmanaged	True		English(1033)
msdyn_converttocase.html	msdyn_converttocase.html	Webpage (HTML)	Unmanaged	True	Email to Case Conversion (when user clicks on Convert To...	English(1033)
msdyn_convertToCase.js	msdyn_convertToCase.js	Script (JScript)	Unmanaged	True	convert to Case	English(1033)
msdyn_escalationCaseResources.js	msdyn_escalationCaseRes...	Script (JScript)	Unmanaged	True	Escalate ribbon button click actions	English(1033)
msdyn_expandemailaddress.js	msdyn_expandemailaddre...	Script (JScript)	Unmanaged	True	Expand Email Address in To field	English(1033)
msdyn_getCaseTemplate.js	msdyn_getCaseTemplate.js	Script (JScript)	Unmanaged	True		English(1033)
msdyn_getCaseTimeLine.js	msdyn_getCaseTimeLine.js	Script (JScript)	Unmanaged	True		English(1033)
msdyn_OnHoldCaseResources.js	msdyn_OnHoldCaseResou...	Script (JScript)	Unmanaged	True	This is show LOB and Select Case Template based on Assi...	English(1033)
msdyn_openholdform.js	msdyn_openholdform.js	Script (JScript)	Unmanaged	True	When the Status of a case from changes to Customer Hol...	English(1033)
msdyn_processingcenterbasedoncou...	msdyn_processingcenterb...	Script (JScript)	Unmanaged	True	To populate Processing Center value based on Country se...	English(1033)
msdyn_webApiSDKHelper.js	msdyn_webapisdkhelper	Script (JScript)	Unmanaged	True		English(1033)
msdyn_workbenchWebapiHelper.js	msdyn_workbenchWebapl...	Script (JScript)	Unmanaged	True		English(1033)
Multiple Uploads	msdyn_multiple_uploads	Webpage (HTML)	Unmanaged	True		English(1033)
notesattachmententitysettings	msdyn_notesattachmen...	Webpage (HTML)	Unmanaged	True		English(1033)

NotesAttachmentEntitySettings_Logo	msdyn_notesattachmen...	ICO format	Unmanaged	True		English(1033)
ReportIcon	msdyn_ReportIcon	ICO format	Unmanaged	True		English(1033)
Sentiment Emotions Display	msdyn_SentimentEmotions	Webpage (HTML)	Unmanaged	True		English(1033)
UnreadEmail	msdyn_unreadEmail.js	Script (JScript)	Unmanaged	True		English(1033)
ValidateDetails	msdyn_validatedetails	Script (JScript)	Unmanaged	True		

3. Custom entities

There are 13 custom entities would be available as part of this solution. We need to make sure that all the custom entities must require a value to execute the below functionalities.


3.1 Business Function

Business Function is the parent value for all the routing information of a Case. Below is the snap shot of this entity.

BUSINESS FUNCTION : INFORMATION

New Business Function

General

Business Function * 

You must provide a value for Business Function.

ACTIVITIES NOTES

No records found.

3.2 Line of Business

Line of Business is having relation with Business Function. Business Function to Line of Business would be 1: N relationship. Below is the snapshot

Hold Assign, Hold Assign To values (Yes/No) would be used to create Child Case for 3rd Party Hold.

3.3 Program

Program is independent value is used for Case creation. Below is the snap shot


3.4 Case Type

Case Type is used to track the type of the case whether it is Transaction or Inquiry. This value drives the Case Sub Type, Reason, Sub Reason of the case. Below is the snap shot

CASE TYPE : INFORMATION

New Case Type

General

Case Type *	 --	ACTIVITIES	NOTES
Description	--	No records found.	


3.5 Case Sub Type

Case Sub type values will be loaded on the form based on Case Type, Line of Business. Below is the snapshot

CASE SUB TYPE : INFORMATION

New Case Sub Type

General

Case Sub Type *	 --	ACTIVITIES	NOTES
Description	--	No records found.	
Case Type *	--		
Line Of Business *	--		

3.6 Reason

Reason values will be loaded on the case form based on Case Sub Type. Below is the snap shot

REASON : INFORMATION

New Reason

General

Reason *	 --	ACTIVITIES	NOTES
Case Sub Type *	--	No records found.	
Description	--		


3.7 Sub Reason

Sub reason values will be loaded based on the Reason selected. Below is the snap shot

SUB REASON : INFORMATION

New Sub Reason

General

Sub Reason *	 --	ACTIVITIES	NOTES
Reason *	--	No records found.	
Description	--		

3.8 Country

Country is independent value. Every country value must be mapped to Processing Center. For example, United States is mapped to AOC (American Operations Center) processing center. Below is the snap shot

COUNTRY [ISO] : INFORMATION

New Country [ISO]

General

Country *	 --
Country Code(3) *	--
Case Processing Center	--

3.9 Escalation Mapping

Escalation mapping is linked with Business Function, Line Of Business. User has to provide Escalation Queue, Owner details while providing values to this custom entity. So that escalation functionality will work properly.

ESCALATION MAPPING : INFORMATION

New Escalation Mapping

General

Name *	--	ACTIVITIES	NOTES
Business Function *	--	No records found.	
Line of Business *	--		
Processing Center	--		
Product	--		
Tier	--		
Root Cause	--		
Escalation Queue Name	--		
Queue Owner	--		
Notification Time Period	--		
Line of Business Manager	--		
Email Template Name	--		


3.10 Out of SLA Reason

This value will be displayed when the case is having expired SLA. System will not allow the user to resolve the case unless until user selected this value.

OUT OF SLA REASON : INFORMATION

New Out Of SLA Reason

General

Name *	<input type="text"/>
Owner *	

3.11 Out of SLA Sub Reason

Based on the Out of SLA reason selected, this value will be displayed.

OUT OF SLA SUB REASON : INFORMATION

New Out Of SLA Sub Reason

General

Name *

Out Of SLA Reason *

--

Owner *



3.12 Hold Reason

Hold reasons are used to populate while case is put on hold. This value is linked with Hold Type (Customer Hold, 3rd Party Hold and Internal Hold). Below is the snap shot

HOLD REASON : INFORMATION

New Hold Reason

General

Name *

 --

Hold Type *

--

Line Of Business *

--

ACTIVITIES NOTES

No records found.

3.13 Root Cause

Root cause can be added by adding respective values of Case subtype. Significance of the entity is to enable user to detect cause of the problem.

ROOT CAUSE : INFORMATION

New Root Cause

General

Root Cause *

Case Sub Type *

--

Description

--

IsPartnerFacing

No

IsOrderCentralFacing

No**NOTES**




No records found.

3.14 Case Templates

This is used to create a quick case with pre-defined set of values. After defining this values in Case Template, user can select this template while creating a case. Values will be auto populated once the user selects the template from Case Template drop down of Case form.

CASE TEMPLATE : INFORMATION

New Case Template

Case Template Name*	--
Owner*	  
Case Status	Active
Suppress Notification:	No
Business Function*	--
Line of Business*	--
Program*	--
Case Type*	--
Case Sub Type*	--
Reason*	--
Sub Reason	--
Country [Processed]	--
Processing Center	--
Product	--
Root Cause	--

ACTIVITIES **NOTES**

No records found.

4. Sample case creation with custom values

Navigate to Dynamics 365 for BPO → Cases

Click on New Case. Enter all the mandatory information and Save the case. Based on above configuration values Case would be created. Below is the snap shot of sample case

The screenshot displays a Dynamics 365 Case record for 'Sample Test Case'. The interface includes a top navigation bar with the case title, priority (Normal), creation date (11/16/2017 1:54 PM), status (In Progress), and owner (Suresh Guduru). Below this is a process flow bar with three stages: 'Identify (Active)', 'Research', and 'Resolve'. The main content area is divided into three sections: 'CASE DETAILS', 'ROUTING DETAILS', and 'CUSTOMER DETAILS'. The 'CASE DETAILS' section lists fields such as Case Title, ID (CAS-00013-C4831N8), Subject, Parent Case, Customer, Origin, Contact, Entitlement, and Product. The 'ROUTING DETAILS' section lists fields such as Business Function, Line of Business, Program, Case Type, Case Sub Type, Reason, and Sub Reason. The 'CUSTOMER DETAILS' section lists fields such as Suresh Guduru, Company, Account, Email, Mobile, and Business.

CASE DETAILS		ROUTING DETAILS		CUSTOMER DETAILS	
Case Title	Sample Test Case	Business Function		Suresh Guduru	
ID	CAS-00013-C4831N8	Line of Business		Company	Account
Subject	--	Program		Email	Mobile
Parent Case	--	Case Type	Tr...	Business	--
Customer	S...	Case Sub Type	A...		
Origin	--	Reason	A...		
Contact	--	Sub Reason	280...		
Entitlement	--				
Product	--				

5. Escalation

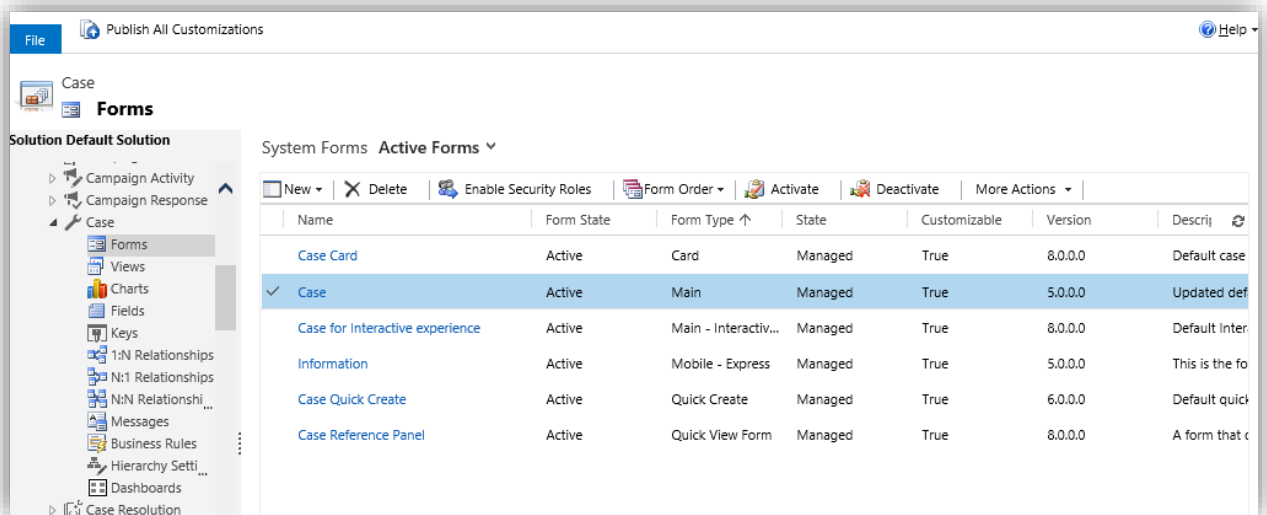
Cases will be escalated at any time based on the severity established by the employee or vendor. Based on the Escalation Mapping details custom entity values, the case will be escalated to Tier 1, Tier 2, and Tier 3 and Tier 4 levels. Need to make sure that all the configurations are available.

5.1 Configuration

Prerequisite: Pls. see the **section** for detailed configuration of Escalation mapping custom entity.

Case Main form

Settings → Customization → Customize the System → Entity → Case → Forms

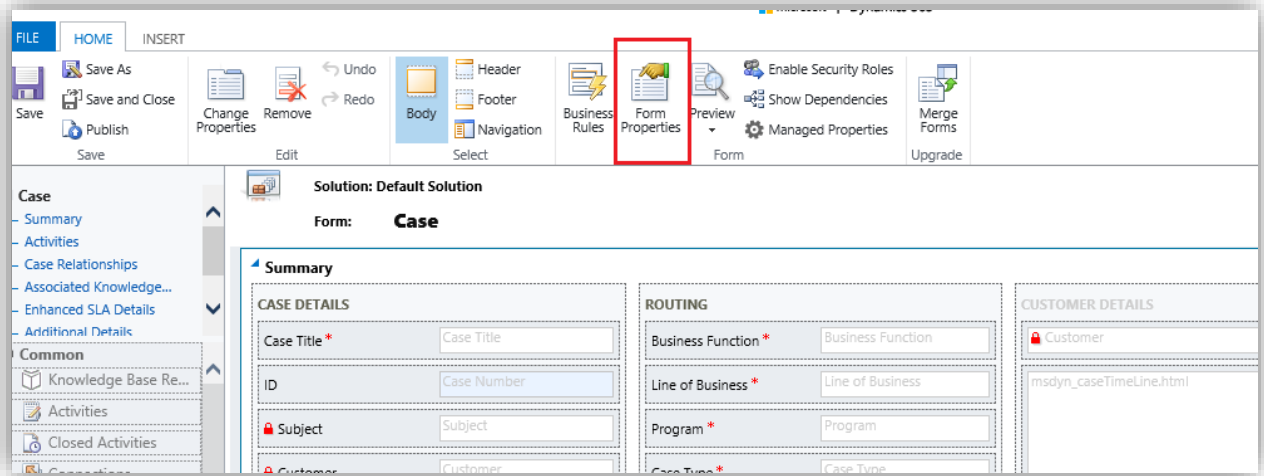


Add “Escalation details” section on the form along with the below mentioned mandatory fields as well and make those fields read only so that end user cannot change it from UI

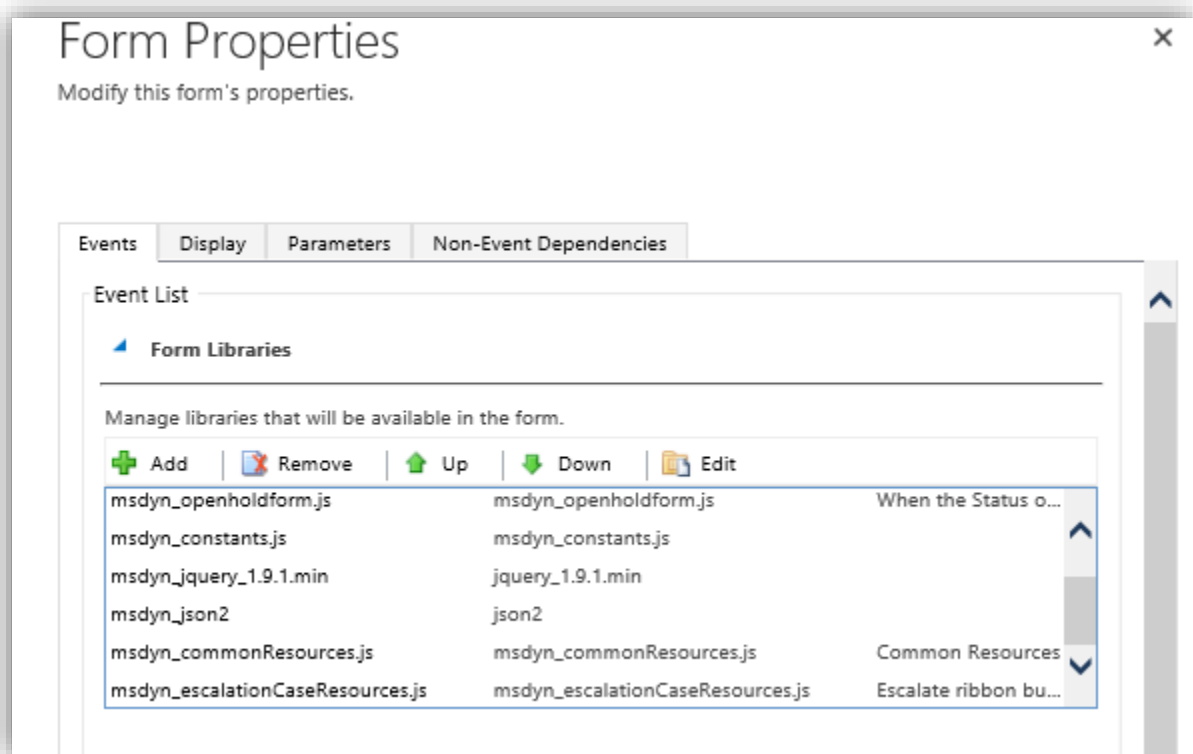
Escalation Details	
Escalated	IsEscalated
Escalation Level	Escalation Level
Escalated By	Escalated By
Case Escalated Since	Case Escalated Since
Escalated On	Escalated On

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Add following JavaScript web resources on the Case form libraries. For this user needs to click on “Form Properties”. Below is the snap shot for reference.



Needs to add below files by clicking on “+ Add” option



Add escalation activity Sub-Grid on the case form as shown to track the escalation activity record for the respective Case.



The screenshot shows a section of the Dynamics 365 interface titled 'Activities'. Below this title is a 'Section' header. Inside the section, there is a sub-grid labeled 'Escalation Activities (Regarding Object)'. The sub-grid is currently empty, showing only the header row.

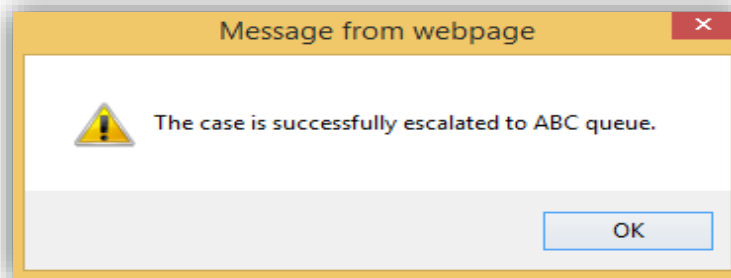
5.2 End User Experience

Create a Case with all the mandatory details and save the case

Click on Escalate button

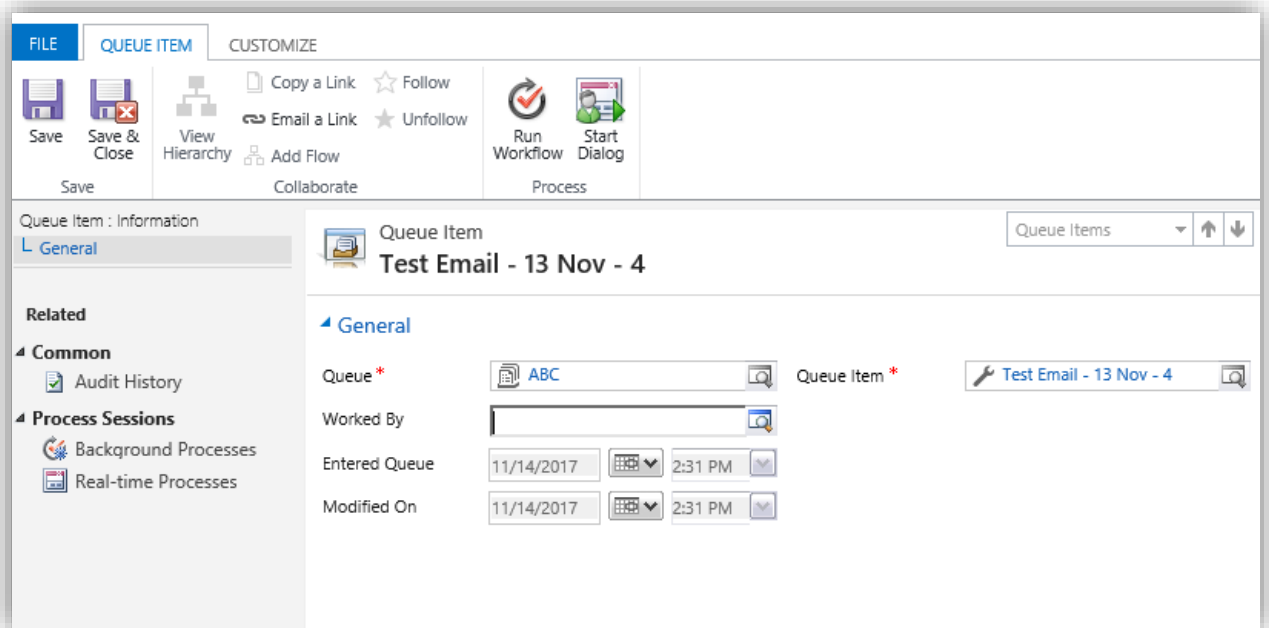


User will be prompted with the below message



Case will be escalated to configured queue as per Escalation mappings details

To check the escalated queue, User must click on **QUEUE ITEM DETAILS** which on the case form and we can see the queue detail. Below is the screenshot.



5.3 Resolve case escalation

Once case is escalated respective case escalation activity will be created as shown in the below screenshot.

ESCALATION ACTIVITY : INFORMATION

Es test 1

General

Name *	Es test 1
Regarding Object	Es test 1
Owner	
Root Cause	Test RC
Activity Status	Resolved

Once the activity status is changed to “Resolved” all the other parameters will be reset to normal values as per below screenshot.

Escalation Details


Escalated	No
Escalation Level	--

NOTE 1: Queue to which case is supposed to be escalated should be available in the CRM system. If queue is not available, successful escalation alert will be displayed but case will not be routed to the queue.

NOTE 2: Case will be escalated to the appropriate respective level only if Product and processing center available on the case form is matching with the escalation mapping record.

i.e.: To escalate case to the Tier 1, if values available on case form is “Product 1” and “AOC” for product and processing center respectively.

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CASE DETAILS		ROUTING
Case Title *	Es test 1	Business Function *
ID	CAS-00181-L8X6K7	Line of Business *
Subject	--	Program *
Customer *	 --	Case Type *
Parent Case	--	Case Sub Type *
Origin	--	Reason *
Contact	--	Sub Reason *
Entitlement	--	
Product	Product1	
Root Cause	--	
Received Date	--	
		PROCESSING DETAILS
		Country [Processed] * All
		Processing Center AOC

As shown in the below screenshot Escalation mapping entity record is having same values for product and processing center. Hence the record will be escalated to Tier 1.

ESCALATION MAPPING : INFORMATION

3P XBOX Tier 1

General

- Name *
- Business Function *
- Line of Business *
- Processing Center
- Product
- Tier
- Root Cause
- Escalation Queue Name
- Queue Owner
- Notification Time Period
- Line of Business Manager
- Email Template Name

6. Custom Hold activities

There are three different custom Holds available in this solution. Those are Customer Hold, 3rd party hold and Internal Hold, below are the examples when case can be put on any of these holds

Customer Hold: This custom hold can be used when user is waiting for additional information from request Submitter. For example, Documents are missing or missing mandatory information.

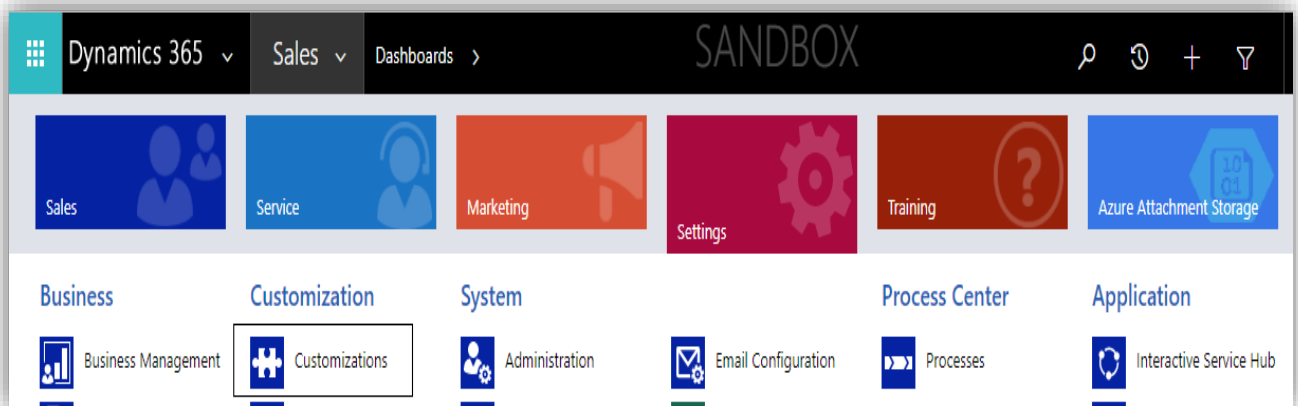
3rd Party Hold: This custom hold can be used when we need external additional information.

Internal Hold: This custom hold can be used, when user go on lunch break or attend any other scheduled meeting etc.

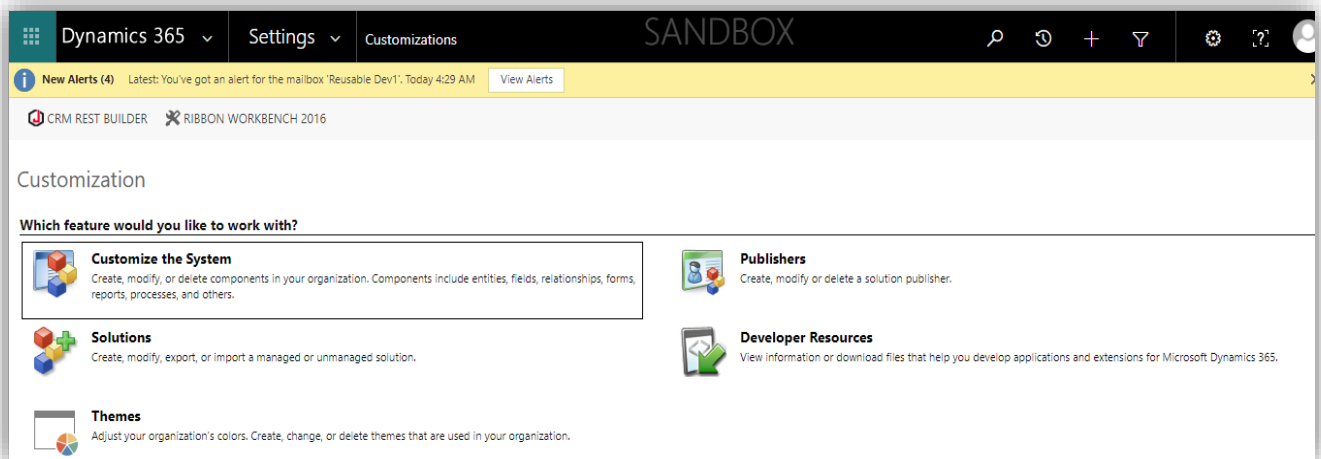
6.1 Hold Activity Configuration

Open Microsoft Dynamics 365

Navigate to Settings → Customizations → Customize the System

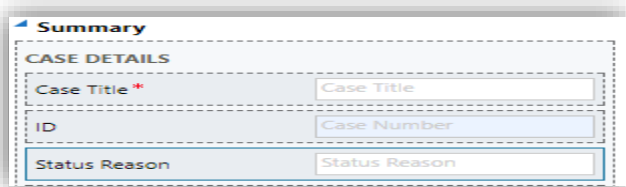


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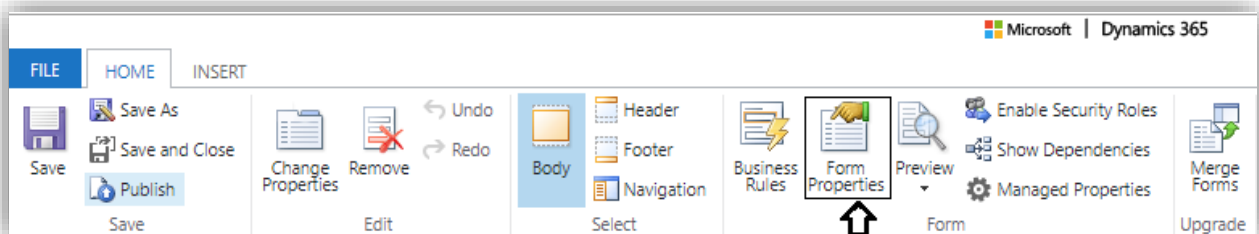


From the entity list in the customize system window chose **Case** entity, open main form.

Add, **Status Reason** field on the form and save the form



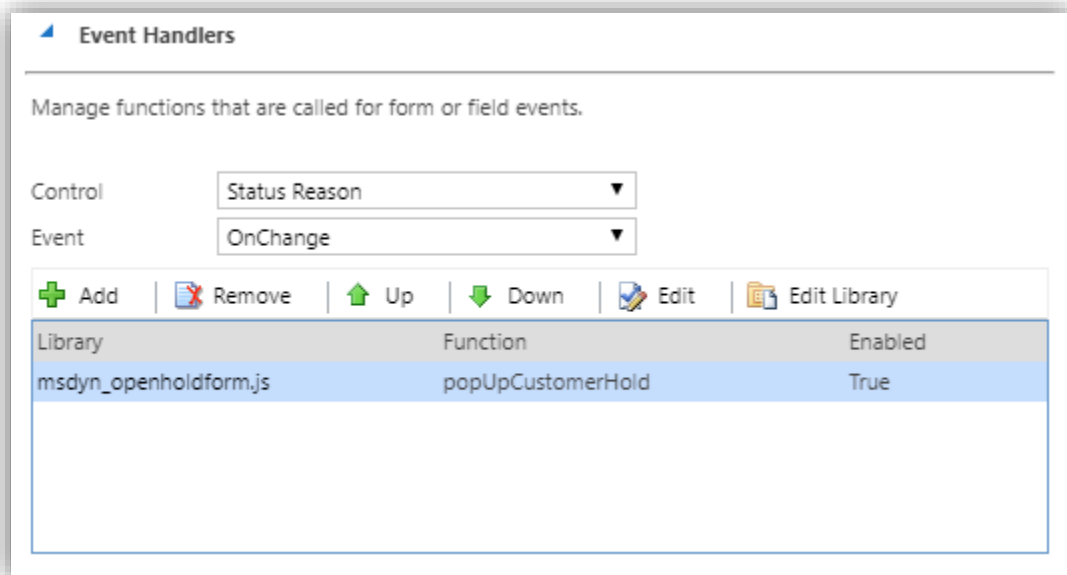
Go to **Form Properties** now, as shown below...



Click on Add in Form Libraries and chose **msdyn_openholdform.js** web resource and add that.

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Go to **Even Handlers**, after adding the web resource. And add this on **Status Reason** change events and add **popUpCustomerHold** in function as shown below.



Note: Once, the even handler is added, remove the **Status Reason** field we have added in the Summary Section. Even we have removed it from the Summary Section, the event triggers on change of Status Reason.

Add section on the Form and named it as **Hold Activities**. Add **Sub Grid** to that Section with below configuration as shown.

Set Properties
Set the List or Chart properties.

Display Formatting Controls

Name
Specify a unique name.
Name * holdactivities

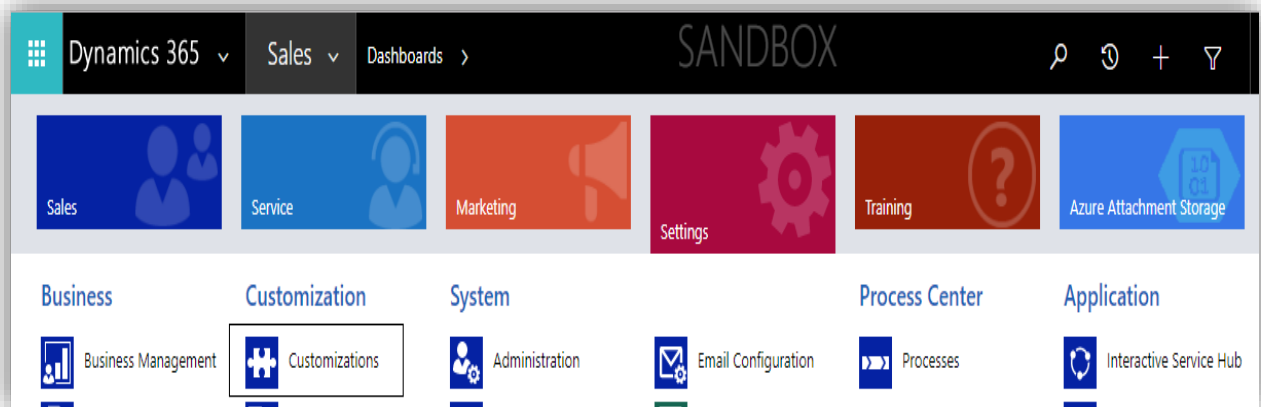
Name
Label * Hold Activities (Regarding)
☒ Display label on the Form

Data Source
Specify the primary data source for this list or chart.
Records Only Related Records
Entity Hold Activities (Regarding)
Default View My Open Hold Activities
Edit New

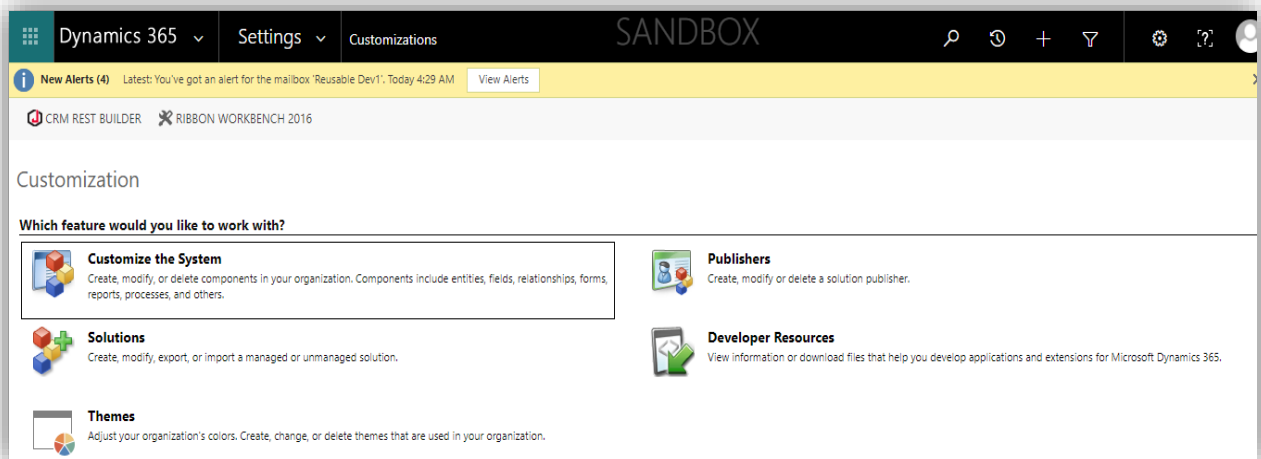
6.1.1. Auto Activity Close - Configuration

This **Auto Activity Close** functionality helps user closing the Hold Activity based on the close date given.

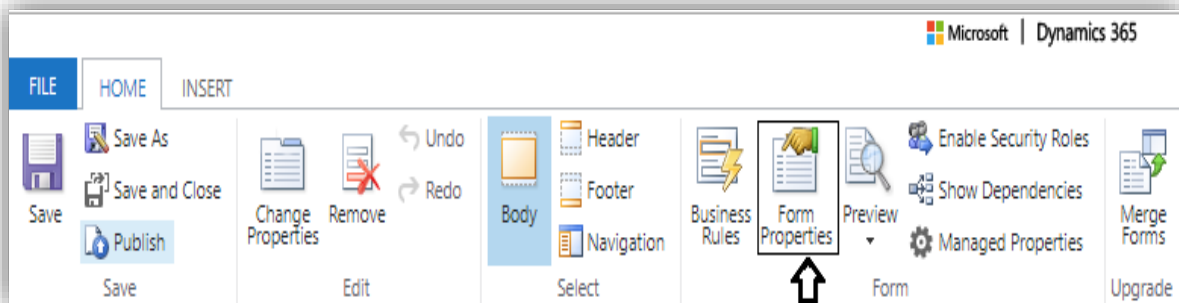
Navigate to Settings → Customizations → Customize the System



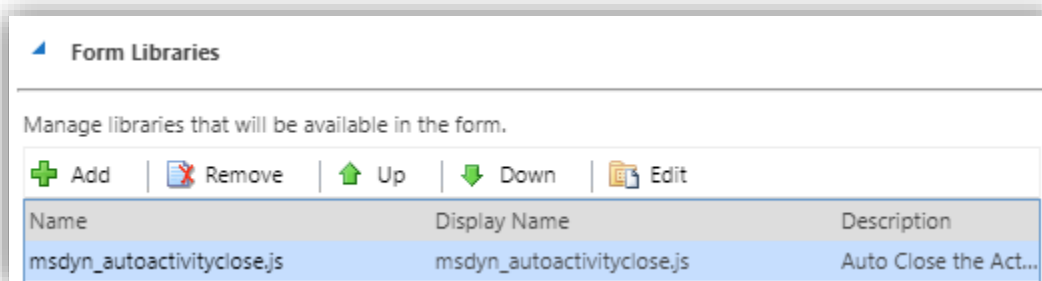
Dynamics 365 for BPO



From the entity list in the customize system window chose **Hold Activity** entity, open main form and Go to **Form Properties** now, as shown below...



Click on Add in Form Libraries and chose **msdyn_openholdform.js** web resource and add that.









Go to **Even Handlers**, after adding the web resource. And add this **onLoad, Close After Date Time and Auto Activity Closure (Yes/No)** change events and add **setAutoActivityCloseAfter** in function as shown below

Event Handlers

Manage functions that are called for form or field events.

Control: Form

Event: OnLoad

 Add |
  Remove |
  Up |
  Down |
  Edit |
  Edit Library







Library	Function	Enabled
msdyn_autoactivityclose.js	setAutoActivityCloseAfter	True

Event Handlers

Manage functions that are called for form or field events.

Control: Auto Activity Closure (Yes/No)

Event: OnChange

 Add |
  Remove |
  Up |
  Down |
  Edit |
  Edit Library







Library	Function	Enabled
msdyn_autoactivityclose.js	setAutoActivityCloseAfter	True

Event Handlers

Manage functions that are called for form or field events.

Control: Close After Date Time

Event: OnChange

 Add |
  Remove |
  Up |
  Down |
  Edit |
  Edit Library

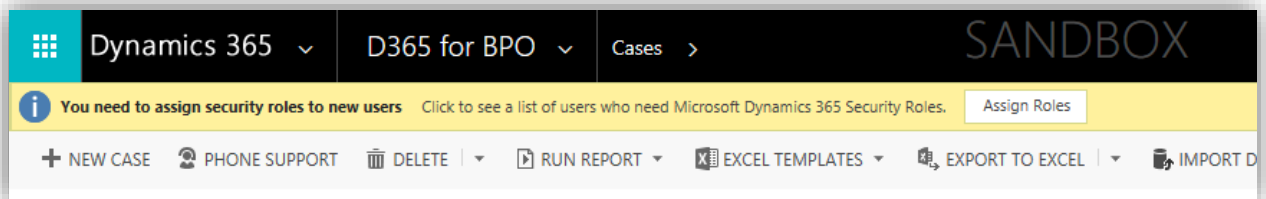
Library	Function	Enabled
msdyn_autoactivityclose.js	setAutoActivityCloseAfter	True

Dynamics 365 for BPO

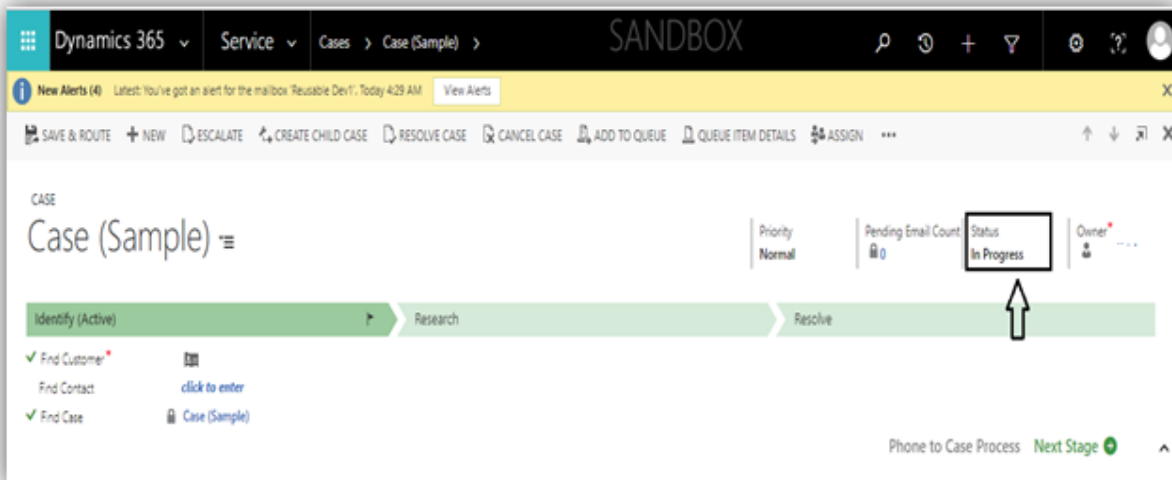
6.2 End User Experience

Once the configuration has been completed, in the Dynamics 365 organization, a user can create new activity record on change of case status reason. The steps outlined below illustrate creating a case from an Email Record.

Navigate to D365 for BPO → Cases

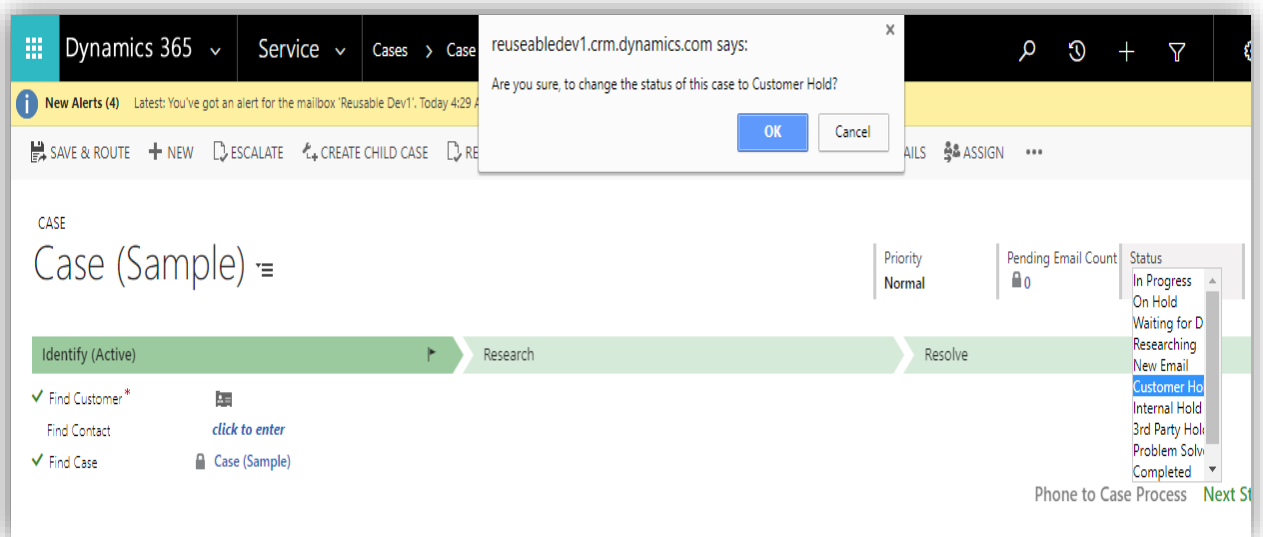


Click on **NEW CASE**, to create a new Case Record.

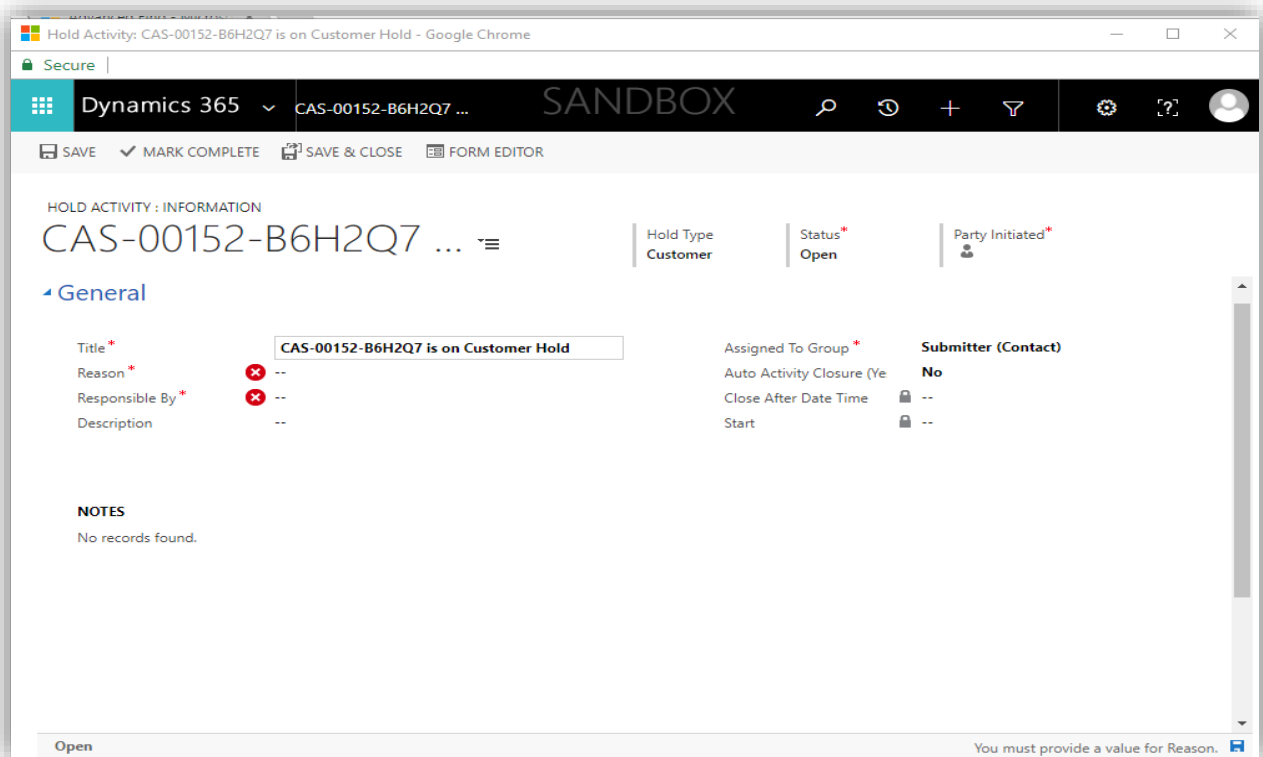


Now change the Status to **Customer Hold**. Then we give get a confirmation alert, whether user wants to open a new hold activity or not. If user clicks on Cancel, no form gets opened.

Dynamics 365 for BPO



If user clicks on OK, a Hold Activity form gets opened as shown below... with case ticket number appended with Case Status Reason.



Fill the required field values – Reason and Responsible By.

Now this activity is mapped with the case.

Dynamics 365 for BPO

Hold Activities				+
Hold Type ↑	Actual Start	Actual End	Ho	
Customer	11/14/2017 5:24...		Authc	

Select Auto Activity Closure (Yes/No) to Yes. Then, Close After Date Time field to be filled out.

The screenshot shows the Dynamics 365 interface for a 'Hold Activity'. The top navigation bar includes 'Dynamics 365', a dropdown menu, and a search bar. Below the navigation bar, there are several action buttons: 'MARK COMPLETE', 'DELETE', 'CLOSE HOLD ACTIVITY', 'TO OPPORTUNITY', 'TO CASE', 'ADD TO QUEUE', 'QUEUE ITEM DETAILS', and 'ASSIGN'. The main content area is titled 'HOLD ACTIVITY: INFORMATION' and displays the activity ID 'CAS-00152-B6H2Q7'. Below this, the 'General' tab is selected, showing various fields. The 'Title' field contains 'CAS-00152-B6H2Q7 is on Customer Hold'. The 'Reason' field is empty. The 'Responsible By' field is empty. The 'Description' field is empty. The 'Assigned To Group' field is empty. The 'Auto Activity Closure (Yes)' field is set to 'Yes'. The 'Close After Date Time' field is set to '11/15/2017 5:30 PM'. The 'Start' field is set to '11/14/2017 5:24 PM'. The 'Submitter (Contact)' field is empty.

Automatically the hold activity gets closed, at the given close after date time.

6 Email expand and validation

This is around validations around Email entity. This will auto populate the From field to default queue, verify the To recipients and While sending the email, it will check on To recipients list and count of number of attachments on the email.

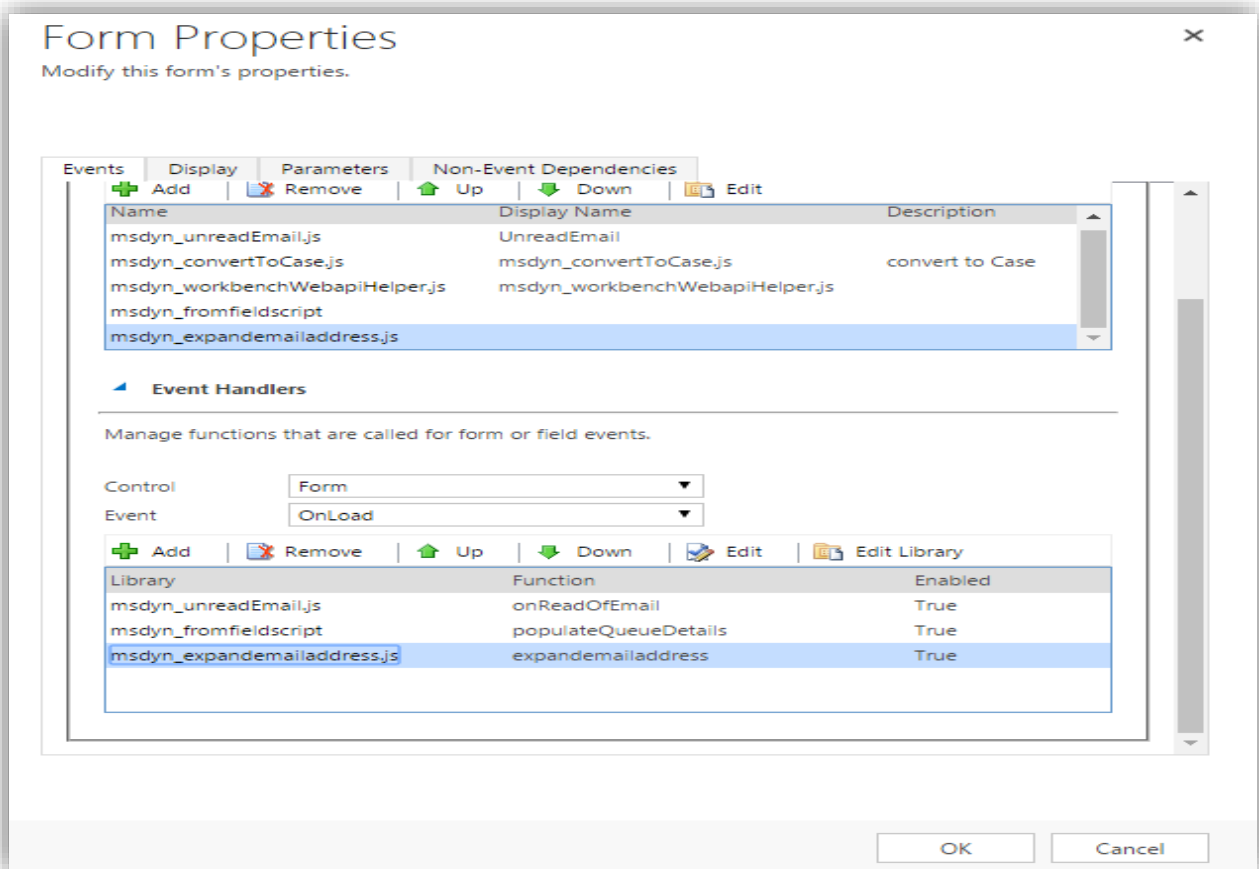
6.1 Configuration

Navigate to Settings→Customizations→Customize the System

Select the Email Entity and Click on Forms

Select Email main form and Click on Form Properties

Add the msdyn_fromfieldscript and msdyn_expandemailaddress on the email form. Also provide necessary function names as per mentioned. populateQueueDetails () and expandemailaddress() for the scripts respectively.



Event Handlers

Manage functions that are called for form or field events.

Control

To

Event

OnChange

+

Add

✖

Remove

↑

Up

↓

Down

✎

Edit

📁

Edit Library

Library	Function	Enabled
msdyn_expandemailaddress.js	expandemailaddress	True

Event Handlers

Manage functions that are called for form or field events.

Control

Form

Event

OnSave

+

Add

✖

Remove

↑

Up

↓

Down

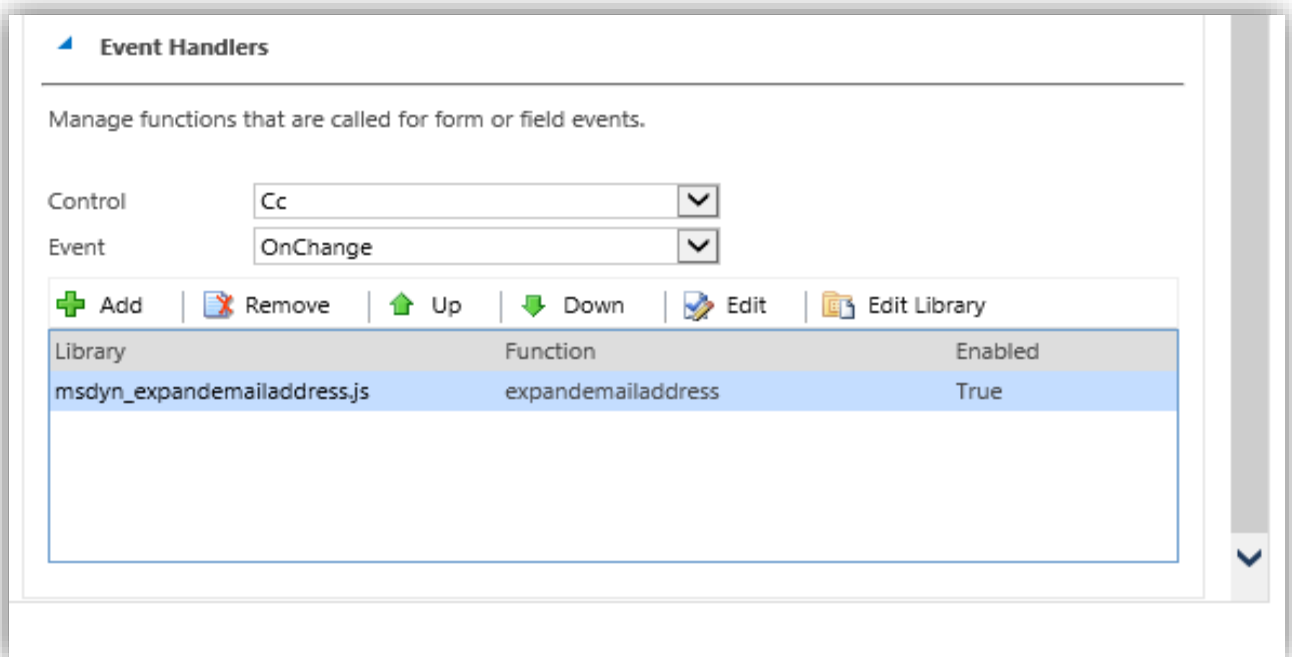
✎

Edit

📁

Edit Library

Library	Function	Enabled
msdyn_expandemailaddress.js	expandemailaddress	True



Note: To and CC fields accept only Contact records and will not accept Account Records. If user tries to add any Account record, they will get automatically removed.

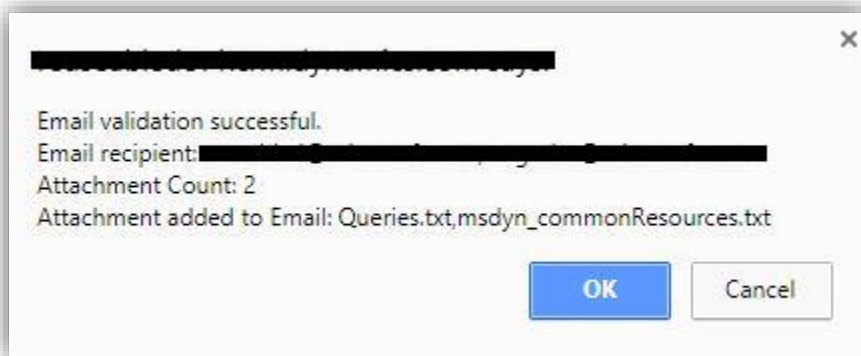
If, still user wants to add Account record, user must remove this web resource (msdyn_expandemailaddress.js) from Email Form Properties, as mentioned in above screenshot.

6.2 End user Experience

Once done with the configurations as mentioned above on Email form load the From field will be populated with default queue.

SEND button will have validations.

While sending email to the respective user following pop up will be visible to user from which user can choose to send or cancel email sending. Alert will show number of files attached and file names as well.



7 SLA

Prerequisite: Out of SLA Reason and Out of SLA Sub Reason custom entities should be configured.

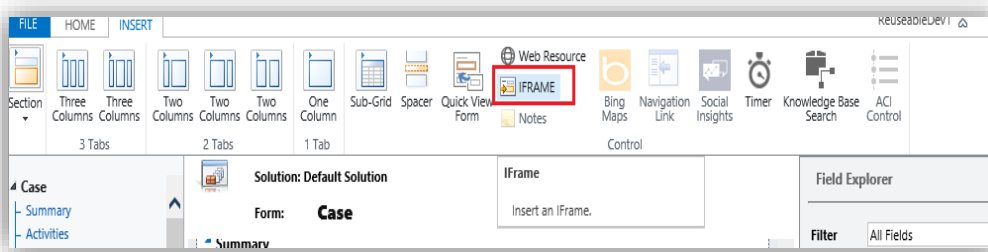
SLA is the OOB functionality

7.1 Configuration

Add the following fields to the Case form provided with the solution as per mentioned.

A screenshot of a form layout with four rows, each containing a label and a text input field. The labels are "Out of SLA Reason", "Out of SLA Sub Reason", "Ops Controllable", and "Case Duration". The input fields are empty and have a light blue border.

To add the Iframe of "case TimeLine" user must go form editor of case form and he has to click "Insert" option and need to add the Iframe which is mentioned in next point.

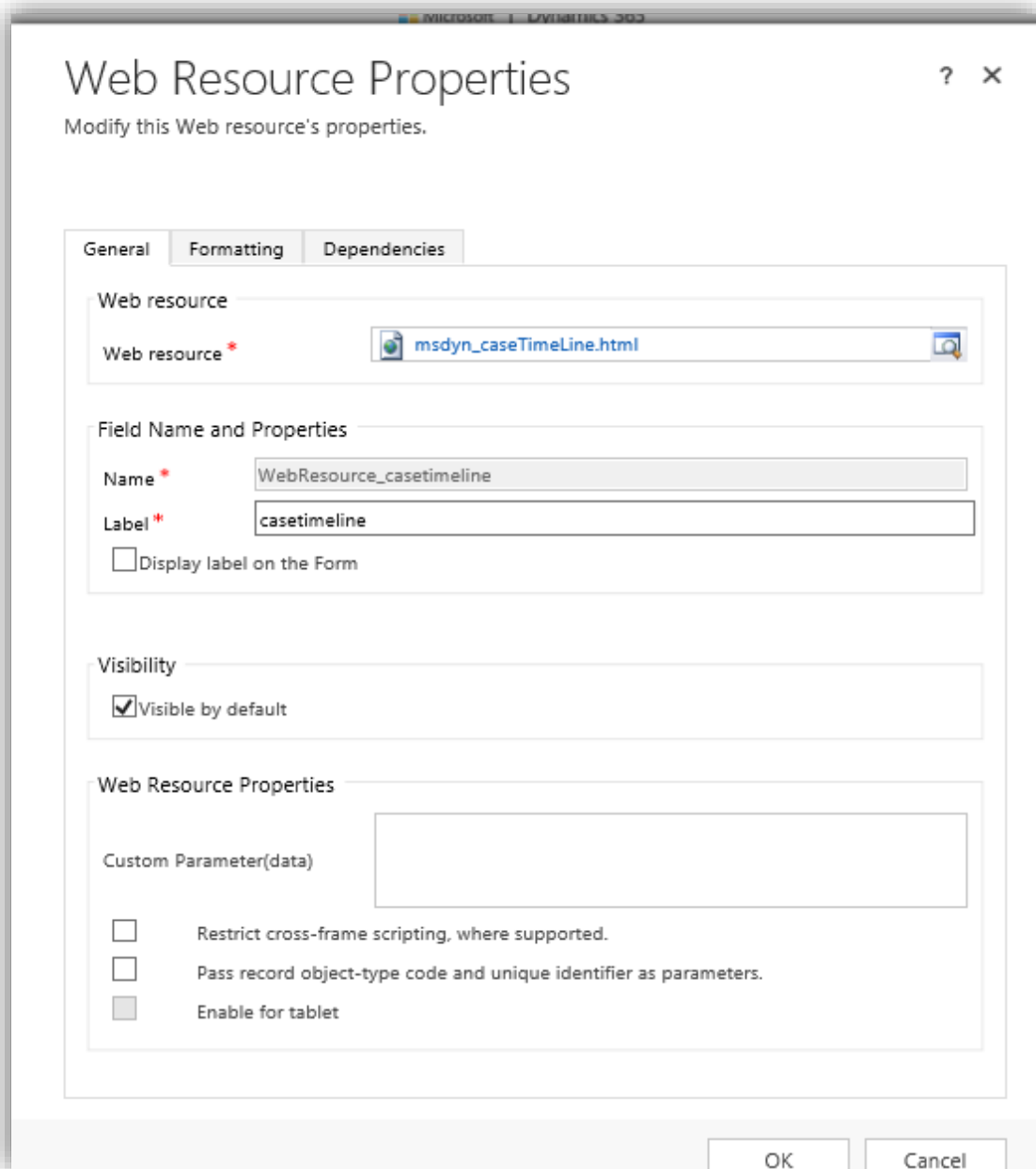


Dynamics 365 for BPO

Add the “msdyn_caseTimeLine.html” on the case form as new section on the case form as per available below.

The screenshot displays the Dynamics 365 Case form interface. At the top, it shows 'Solution: Default Solution' and 'Form: Case'. Below this is a 'Summary' tab. The form is divided into three main sections: 'CASE DETAILS', 'ROUTING', and 'CUSTOMER DETAILS'. The 'CASE DETAILS' section includes fields for Case Title, ID, Subject, Customer, Origin, Contact, Entitlement, Product, Root Cause, and Received Date. The 'ROUTING' section includes fields for Business Function, Line of Business, Program, Case Type, Case Sub Type, Reason, and Sub Reason. The 'CUSTOMER DETAILS' section includes a Customer field. A new section, 'msdyn_caseTimeLine.html', is being added to the form, highlighted by a red border. This section is currently empty and is positioned below the 'CUSTOMER DETAILS' section.

After adding msdyn_caseTimeLine.html web resource to case form then we have to double click on this and needs to do below property.





The image shows a 'Web Resource Properties' dialog box with three tabs: 'General', 'Formatting', and 'Dependencies'. The 'General' tab is active. It contains sections for 'Web resource', 'Field Name and Properties', 'Visibility', and 'Web Resource Properties'. The 'Web resource' section has a text field with 'msdyn_caseTimeline.html'. The 'Field Name and Properties' section has 'Name' as 'WebResource_casetimeline' and 'Label' as 'casetimeline', with an unchecked checkbox for 'Display label on the Form'. The 'Visibility' section has a checked checkbox for 'Visible by default'. The 'Web Resource Properties' section has a 'Custom Parameter(data)' text area and three unchecked checkboxes: 'Restrict cross-frame scripting, where supported.', 'Pass record object-type code and unique identifier as parameters.', and 'Enable for tablet'. 'OK' and 'Cancel' buttons are at the bottom right.

Web Resource Properties

Modify this Web resource's properties.

General Formatting Dependencies

Web resource

Web resource *  msdyn_caseTimeline.html 

Field Name and Properties

Name * WebResource_casetimeline

Label * casetimeline

☐ Display label on the Form

Visibility

☒ Visible by default

Web Resource Properties

Custom Parameter(data)

☐ Restrict cross-frame scripting, where supported.

☐ Pass record object-type code and unique identifier as parameters.

☐ Enable for tablet

OK Cancel

Web Resource Properties ? X

Modify this Web resource's properties.

General **Formatting** **Dependencies**

Layout

Select the number of columns the control occupies:

☐ One column

☒ Two columns

☐ Three columns

☐ Four columns

Row Layout

Select the number of rows the control occupies.

Number of Rows

☐ Automatically expand to use available space.

Scrolling

Select the scrolling type for the IFRAME.

Scrolling ▼

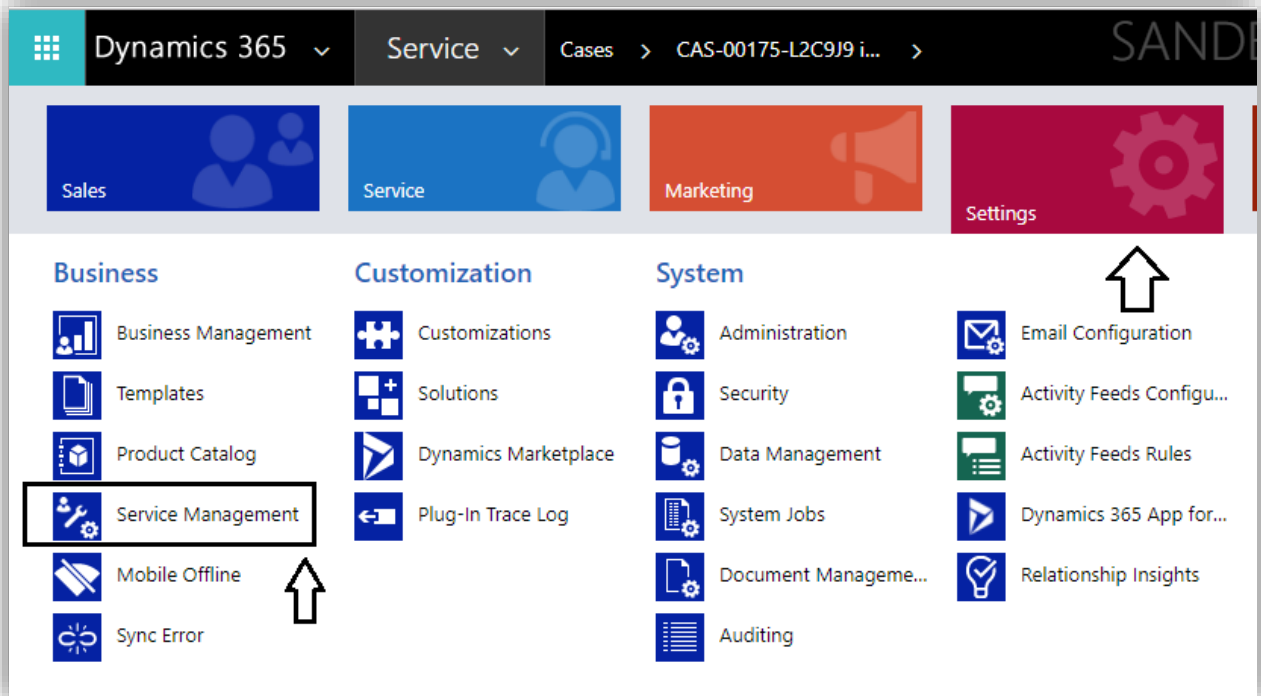
OK Cancel

Configure the SLA with the proper condition such that it will trigger on the case creation. Once SLA is triggered SLA Left and actual SLA fields will be visible. Based on hold activities other fields will be populated respectively.

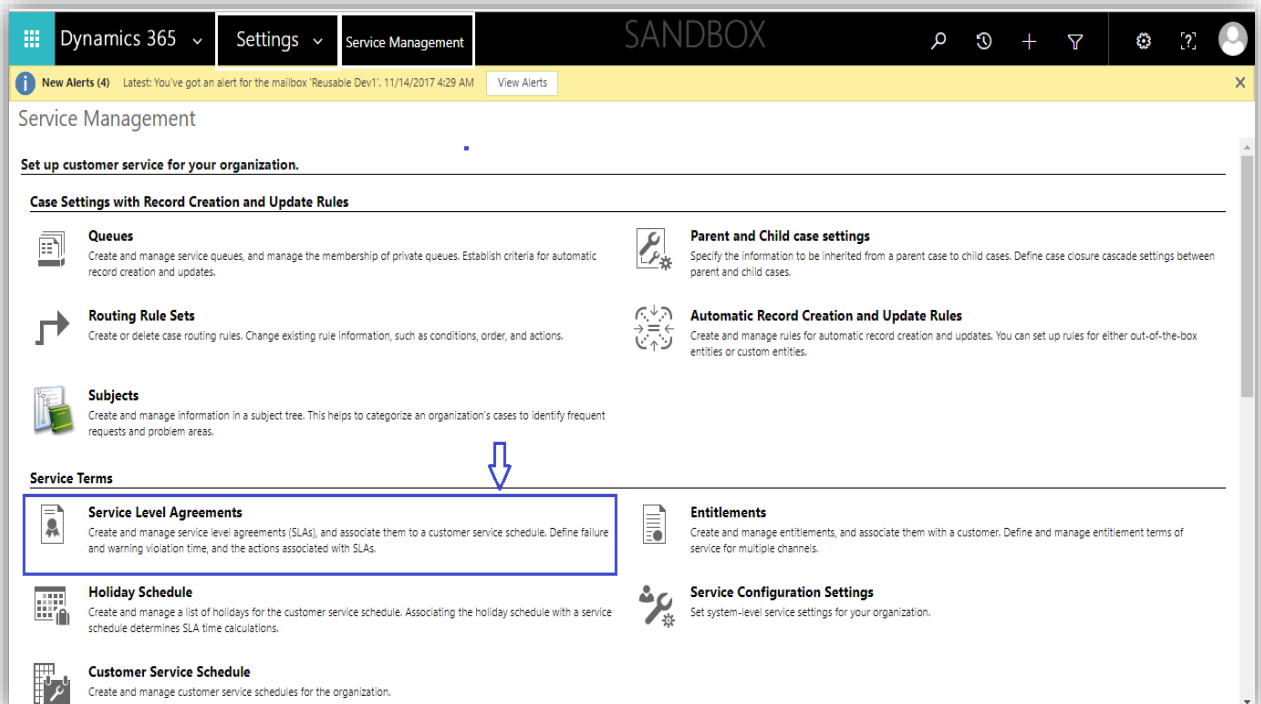
Below is an example on configuration of SLA

Navigate to Settings → Service Management

Dynamics 365 for BPO



Go to **Service Level Agreements** in Service Terms section.



Dynamics 365 for BPO

Click “New” to set up new SLA. A dialogue box comes out and to Create SLA, provide Name for SLA and chose Case entity from the drop down and click **ok**.



Create SLA

Create a new SLA record

Name

Entity*

OK Cancel

A SLA record gets opened and fill out the required fields and save the record as shown below

SLA

SLA (Sample)

General

Name*	SLA (Sample)
Entity*	Case
Applicable From*	Created On
Business Hours	--
SLA Type*	Enhanced
Allow Pause and Resume*	Allow
Description	--

SLA Details

Name	Warn After	Failure After	SLA KPI Field	Created On	Mod
No SLA Item records found.					

Dynamics 365 for BPO

Now, click on + symbol in SLA Details section to configure SLA and a new window gets opened to configure SLA Details, in which we can mention the Success Criteria and Applicable When (to trigger SLA)

The screenshot shows the 'SLA Item Information' form. The top ribbon includes tabs for FILE, SLA ITEM, and a list of actions: Save, Save & Close, Delete, Speech to Text Start, Speech to Text Stop, View Hierarchy, Copy a Link, Email a Link, Follow, Unfollow, Run Workflow, Start Dialog, Word Templates, and Run Report. The main section is titled 'SLA Item Information' and has a dropdown for 'SLA Items'. Below this is the 'General' section with fields for 'Name' (SLAItem(Sample)), 'SLA KPI' (First Response By KPI), and a dropdown for 'First Response By KPI'. The 'Applicable When' section has a 'Clear' button and radio buttons for 'Group AND' and 'Group OR'. It contains a table with columns for 'Case', 'Case Reason', and 'Contains Data'. The 'Success Criteria' section also has a 'Clear' button and radio buttons for 'Group AND' and 'Group OR'. It contains a table with columns for 'Case', 'Status Reason', 'Equals', and 'Completed'.

Case	Case Reason	Contains Data
Case	Country (Processed)	Contains Data
Select		

Case	Status Reason	Equals	Completed
Case	Status Reason	Equals	Completed
Select			

The screenshot shows the 'SLA Item Information' form with the 'Success Actions' section. It has a dropdown for 'Add Step' and a 'Delete this step' button. Below this is the 'SLA Item Failure' section with a 'Failure after' field set to '1 hour' and a dropdown. The 'Failure Actions' section has a dropdown for 'Add Step' and a 'Delete this step' button. Below this is the 'SLA Item Warning' section with a 'Warn after' field set to '30 minutes' and a dropdown. The 'Warning Actions' section has a dropdown for 'Add Step' and a 'Delete this step' button.

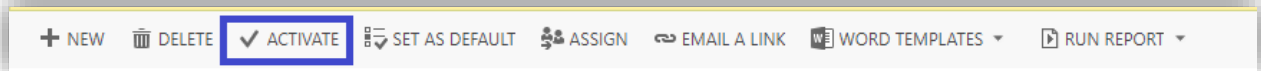
Failure after
1 hour

Warn after
30 minutes

Once Applicable and Success Criteria is filled out, save and close the form.

Now click on activate the SLA to trigger that on the given conditions.

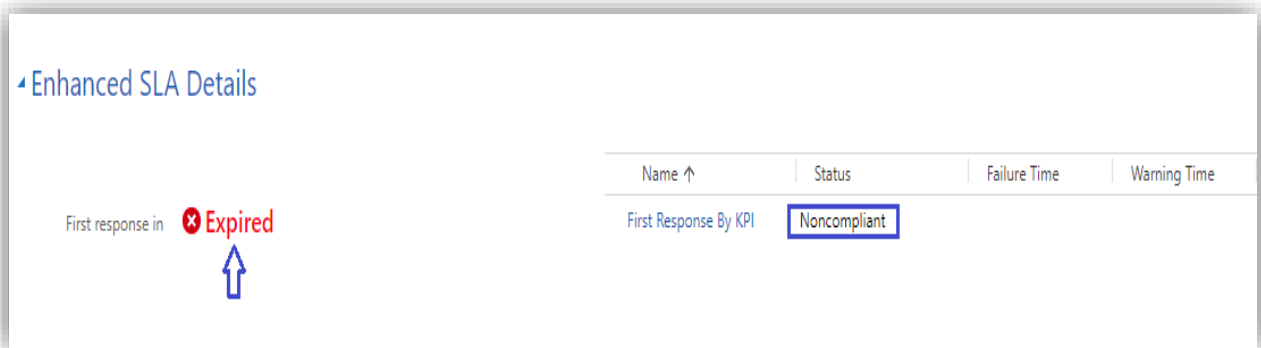
Dynamics 365 for BPO



Reference(SLA): <https://www.microsoft.com/en-us/dynamics/crm-customer-center/define-service-level-agreements-customer-service.aspx>

7.2 End User Experience

Once the SLA is expired and user tries to resolve the case, Out Of SLA Reason and Out Of SLA Reason fields get visible and mandatory fields. User needs to fill them as well.



After above SLA configuration, if user try to create a case then the SLA information would be update like below on case.

SLA Left	0h 4m	Actual SLA	0h 0m
Total Hold Time	0h 0m	3rd Party Hold	0h 0m
		Customer Hold	0h 0m
		Internal Hold	0h 0m
Total Case Duration			0h 1m

Case Duration  1

Out Of SLA Details

Out of SLA Reason *

Out of SLA Sub Reason *

8 Convert to Case

The Convert To Case Solution is an add-on feature to dynamics 365 CRM to create a case from Email record.

8.1 Configuration

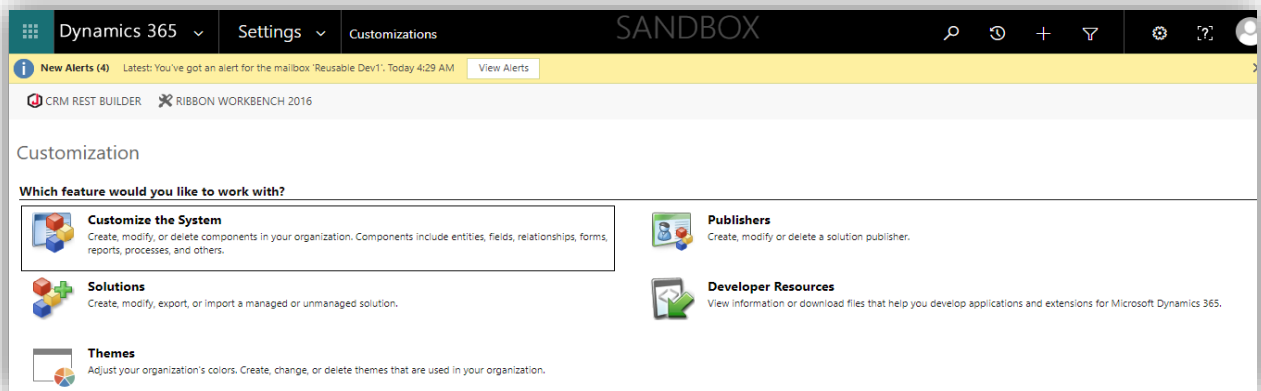
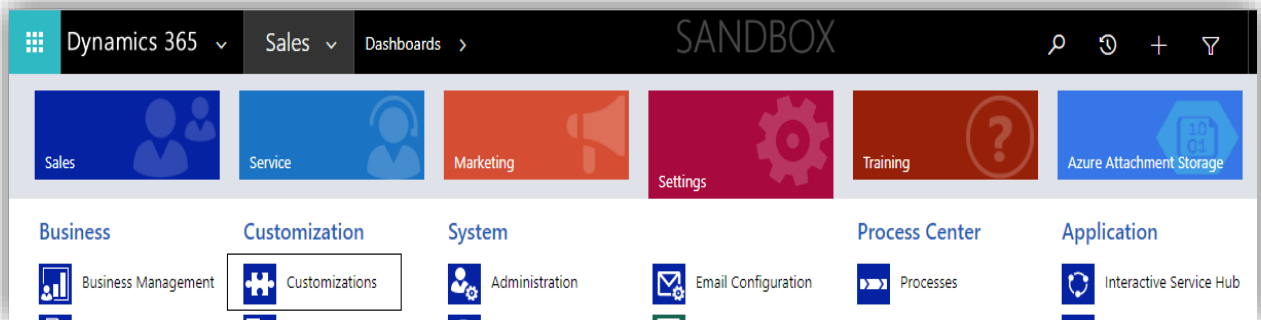
Pre-requisites:

- Fields to be added on Case Form.
- Records to be created in Case Template Entity (optional).
- Filter conditions to be applied on the fields added on Case Form.

UI Configuration – Case Form

Navigate to Settings → Customizations → Customize the System

Dynamics 365 for BPO



From the entity list in the customize system window chose Case entity, open main form and add a section with fields as shown in below screenshot

The image shows a 'ROUTING' section with seven rows of fields. Each row has a label with a red asterisk and a corresponding input field. The labels are: Business Function, Line of Business, Program, Case Type, Case Sub Type, Reason, and Sub Reason. The input fields contain the text: Business Function, Line of Business, Program, Case Type, Case Sub Type, Case Reason, and Case Sub Reason respectively.

After adding this section with the above-mentioned Fields (Lookups), we need to add some filter conditions to the lookups. So, that based on the filter we have applied all the other lookup values get populates (Dependent Lookups, in fact).

Go to **Field Properties** of **Line Of Business** field, and in **Display** tab, go to **Related Records Filtering** section and select **Business Function (Cases)** in **Only show records where** and choose **Business Function – Line Of Business (Lines Of Business)** in **Contains** as shown below.

The image shows a 'Related Records Filtering' dialog box. It has a section titled 'Only show records where:' with a checked checkbox. Below this is a dropdown menu showing 'Business Function (Cases)'. Underneath is the word 'Contains' followed by another dropdown menu showing 'Business Function - Line of Business (Lines of Business)'. At the bottom, there is a checked checkbox labeled 'Users can turn off filter'.

This filter condition helps in filtering out the LOBs (Line Of Business) records based on Business Function values.

Dynamics 365 for BPO

Follow the same steps mentioned in above for all the other below fields as shown

a. Program

Related Records Filtering

☒ Only show records where:

Line of Business (Cases) ▼

Contains

Line Of Business (Programs) ▼

☒ Users can turn off filter

b. Case Sub Type

Related Records Filtering

☒ Only show records where:

Line of Business (Cases) ▼

Contains

Line Of Business (Case Sub Types) ▼

☐ Allow users to turn off filter

c. Reason

Related Records Filtering

☒ Only show records where:

Case Sub Type (Cases) ▼

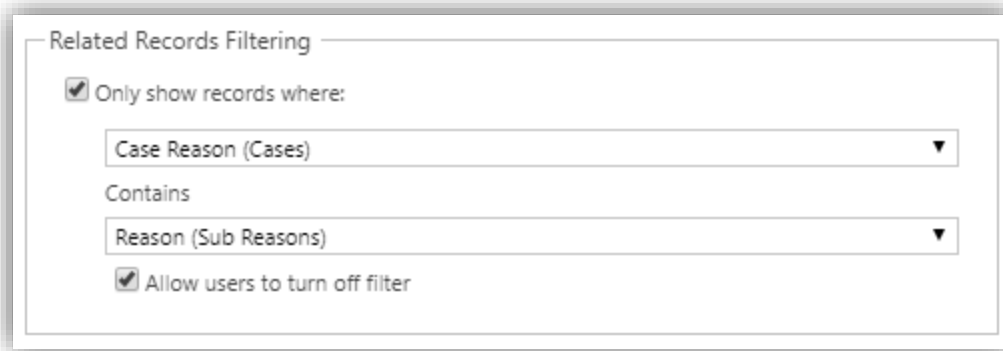
Contains

Case Sub Type (Reasons) ▼

☒ Allow users to turn off filter

d. Sub Reason

Dynamics 365 for BPO



Related Records Filtering

☒ Only show records where:

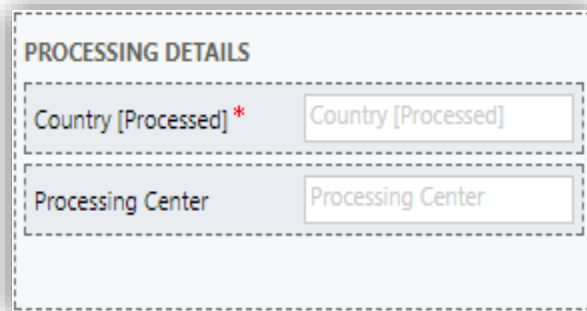
Case Reason (Cases)

Contains

Reason (Sub Reasons)

☒ Allow users to turn off filter

Add one more section with fields as shown in below screenshot

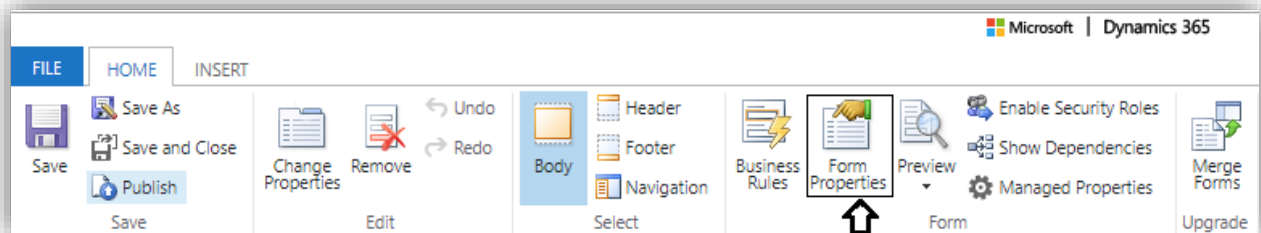


PROCESSING DETAILS

Country [Processed] * Country [Processed]

Processing Center Processing Center

Now, go to **Form Properties**



Microsoft | Dynamics 365

FILE HOME INSERT

Save Save As Save and Close Publish

Change Properties Remove Undo Redo

Body Header Footer Navigation

Business Rules Form Properties Preview

Enable Security Roles Show Dependencies Managed Properties Merge Forms

Save Edit Select Form Upgrade

Click on Add in Form Libraries and chose **msdyn_processingcenterbasedoncountry.js** and add.







Go to **Even Handlers**, after adding the web resource. And add this **onLoad** and on Country[Processed] change events and add **onLoadReadCountry** in function as shown below.

Event Handlers

Manage functions that are called for form or field events.

Control: Form

Event: OnLoad

 Add |  Remove |  Up |  Down |  Edit |  Edit Library







Library	Function	Enabled
msdyn_processingcenterbasedoncountr...	onLoadReadCountry	True

Event Handlers

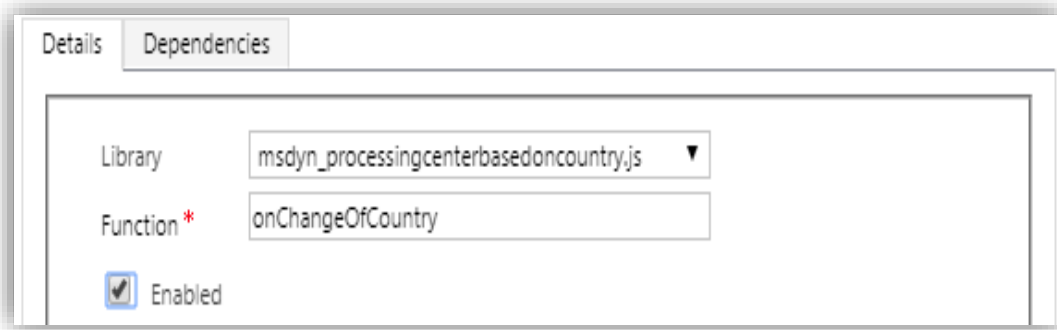
Manage functions that are called for form or field events.

Control: Country [Processed]

Event: OnChange

 Add |  Remove |  Up |  Down |  Edit |  Edit Library

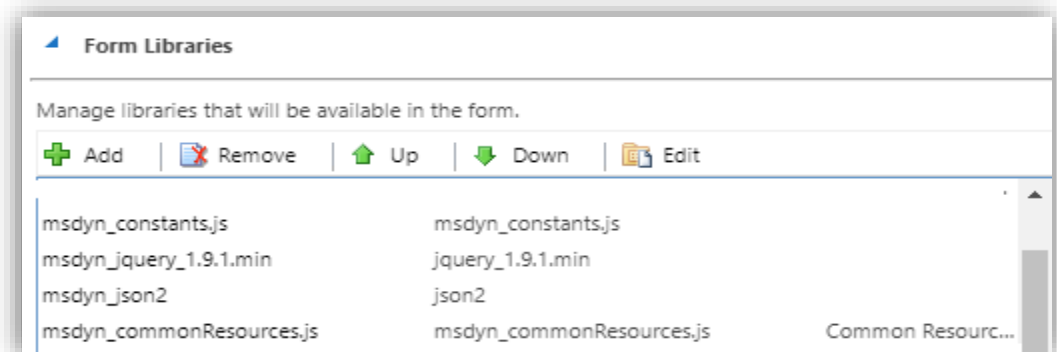
Library	Function	Enabled
msdyn_processingcenterbasedoncountr...	onChangeOfCountry	True



Note: `msdyn_processingcenterbasedoncountry.js`, is a web resource, which helps populating **Processing Center** information automatically based on the selected **Country [Processed]**. We need to map processing center information in Countries Entity to auto-populate this in case form.

Make sure all the below mentioned web resources are added in **Form Libraries** from Form Properties.

- `msdyn_constants.js`
- `msdyn_commonResources.js`
- `jquery_1.9.1.min`
- `msdyn_json2`



8.1.1 Optional Configuration

This section provides information on optional configuration on functionality of Case Template entity. This entity helps to populate all the fields automatically while we are converting an email into a case.

Below are the required entities list to create Case Template.

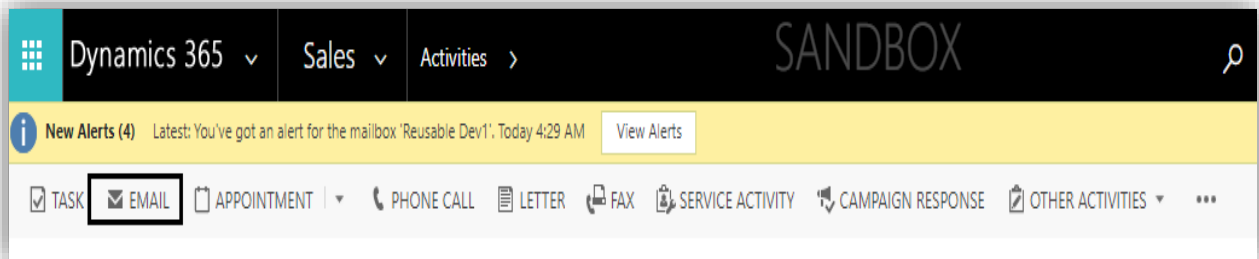
- Navigate to D365 for BPO -> Case Templates
- Click on New and Create a Case Template Record.

8.2 End User Experience

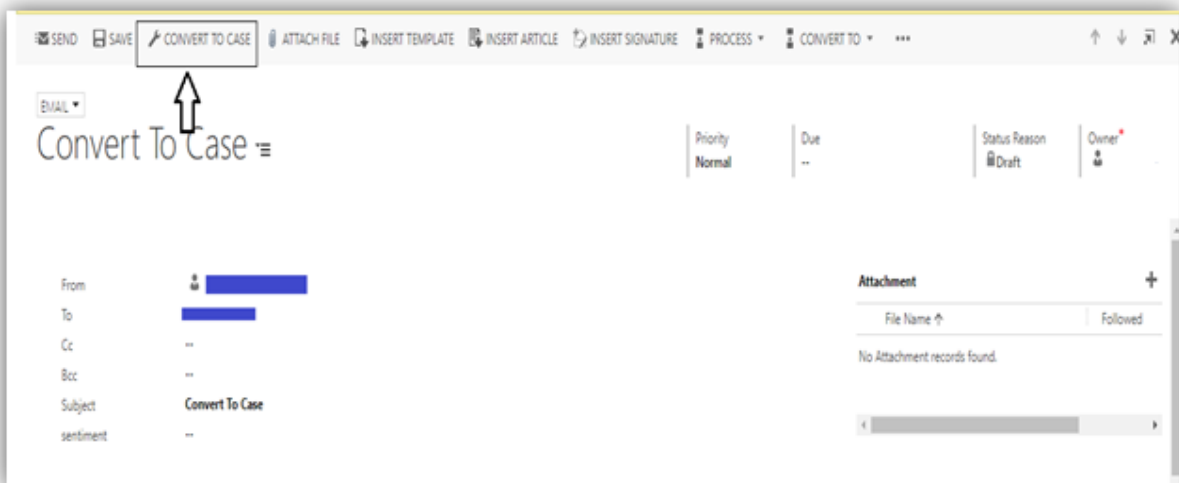
Dynamics 365 for BPO

Once the solution is imported and configured in the Dynamics 365 organization, a user can create a case from Email. The steps outlined below illustrate creating a case from an Email Record.

Navigate to D365 for BPO → Activities → Email

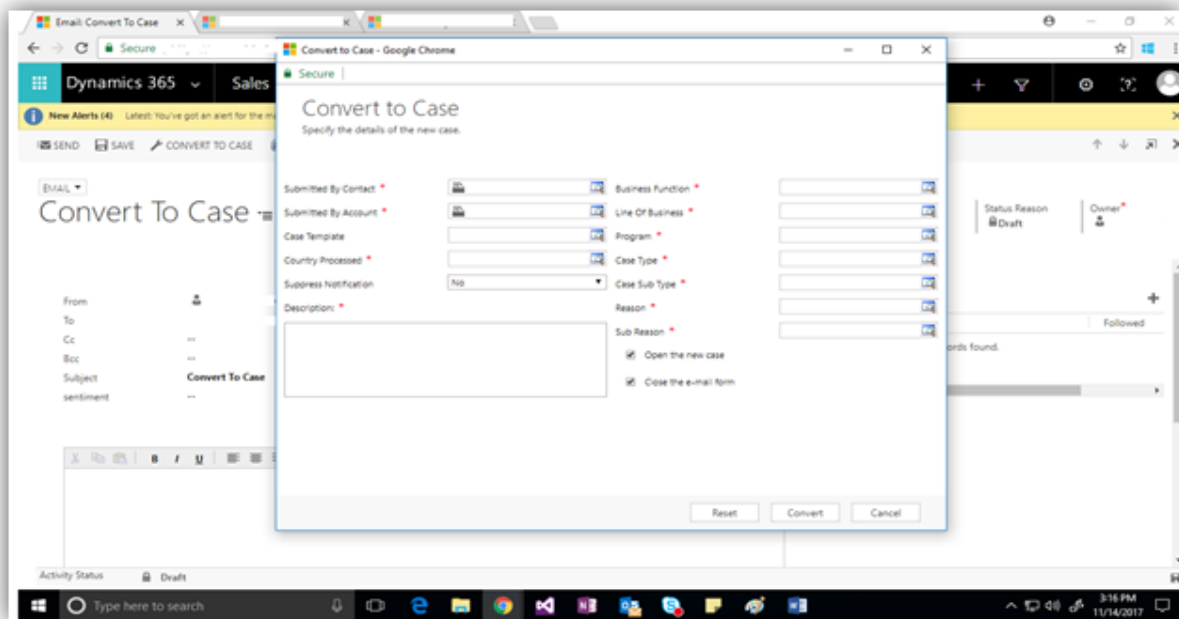


Click on Email, to create a new Email Record. Provide From, To and Subject fields with required information.



Click on Convert To Case in the Email Record ribbon as shown in the above screenshot

Dynamics 365 for BPO



- Once user fills From field information, automatically if it's a System User Record, and the same User record information with email address is present in the Contact record, when the Convert To Case window pops-up Submitted By Contact and Submitted By Account.
- Select a record from Case Template lookup, to auto-populate all the other fields.
- Subject of the Email would be taken as Case title.

Dynamics 365 for BPO

The screenshot shows a web browser window titled "Convert to Case - Google Chrome". The page is titled "Convert to Case" with the subtitle "Specify the details of the new case." The form contains several fields and sections:

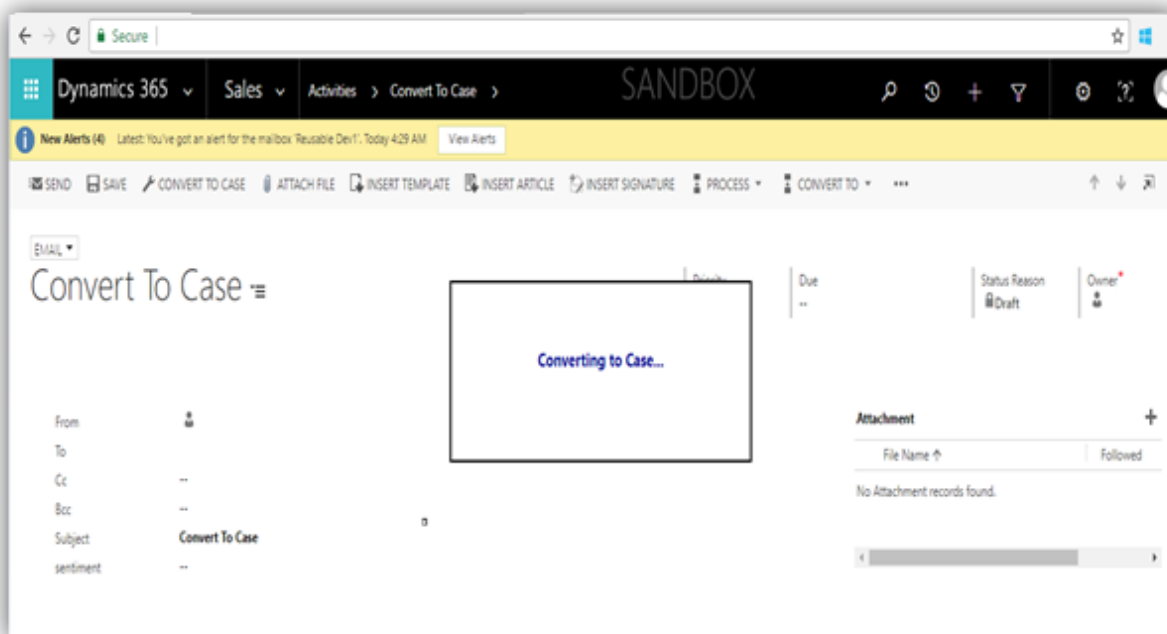
- Submitted By Contact ***: A dropdown menu with the value "G".
- Submitted By Account ***: A dropdown menu with the value "Account (Sample)".
- Case Template**: A dropdown menu with the value "AdOps LOB Template".
- Country Processed ***: A dropdown menu with the value "United Kingdom".
- Suppress Notification**: A dropdown menu with the value "No".
- Description ***: A text area containing the text "Converting it to Case from Email".
- Business Function ***: A dropdown menu with the value "AdOps".
- Line Of Business ***: A dropdown menu with the value "AdOps".
- Program ***: A dropdown menu with the value "Adops program".
- Case Type ***: A dropdown menu with the value "Inquiry".
- Case Sub Type ***: A dropdown menu with the value "ART Inquiry".
- Reason ***: A dropdown menu with the value "Invoice Inquiry".
- Sub Reason ***: A dropdown menu with the value "Sample Reimbursement".
- Open the new case**: A checkbox that is checked.
- Close the e-mail form**: A checkbox that is checked.

At the bottom of the form, there are three buttons: "Reset", "Convert", and "Cancel".

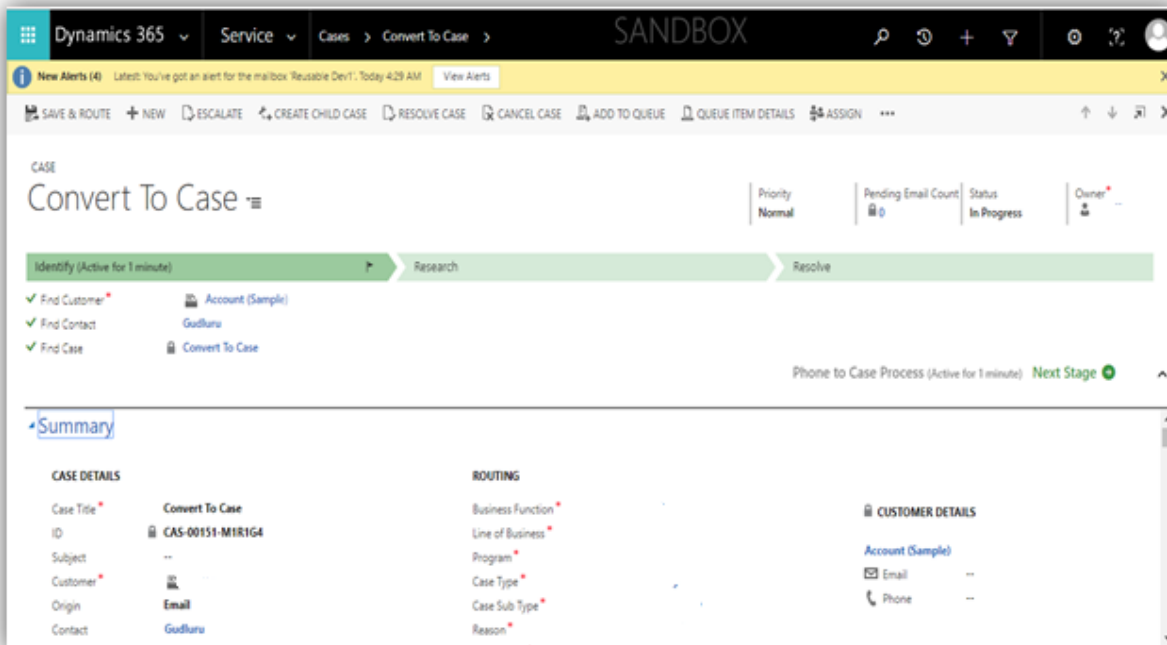
Even without selecting record from **Case Template**, we can populate another fields information manually.

Click on Convert and Converting to Case... progress can be seen as below

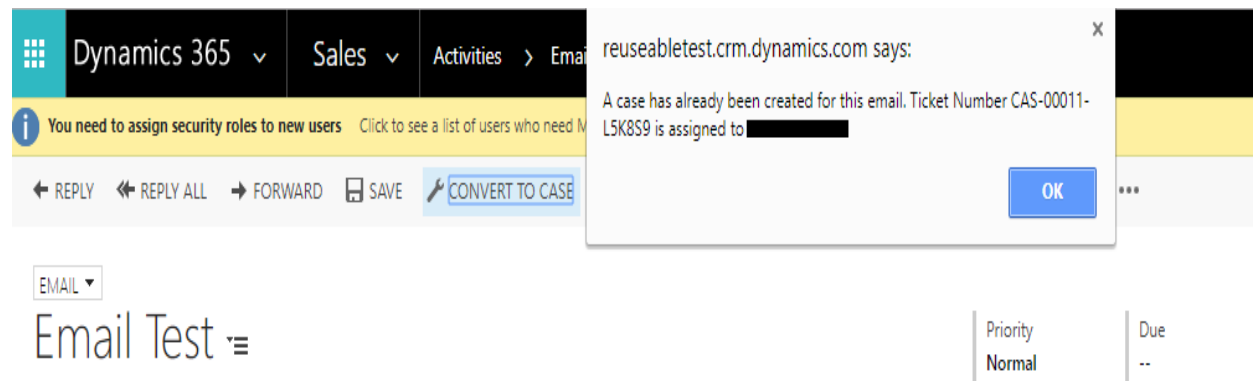
Dynamics 365 for BPO



A case would get created as shown below, with the information user has provided while converting email to case.



After the case has been created from the email, if user clicks on Convert To Case once again, it will provide information that a case has been created and to whom its assigned.



9. Child Case creation for custom Hold status

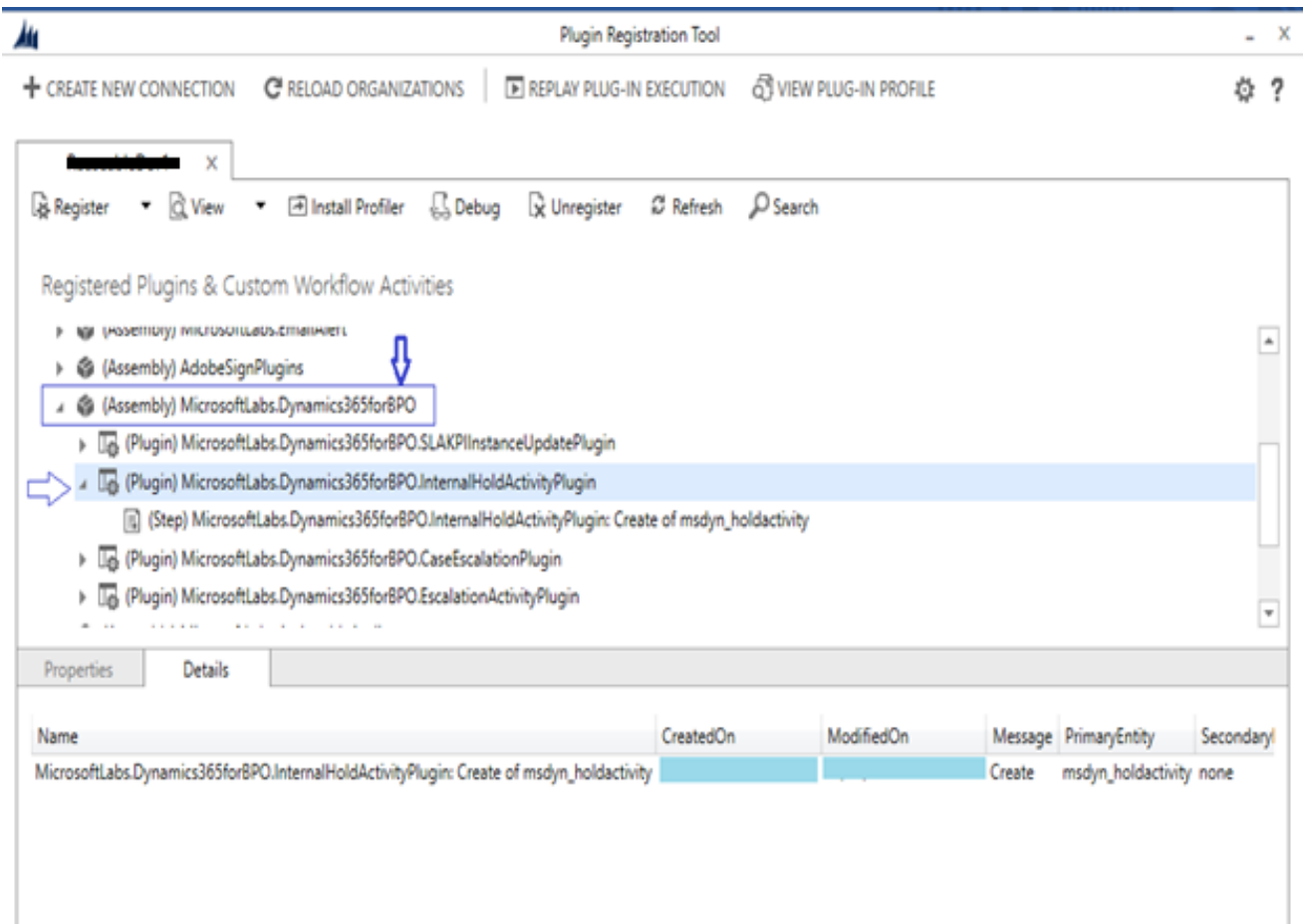
9.1 Configuration

Plugin Configuration – Child Case Create

This section helps in, configuring Plugin Step running context to create a Child Case. As the child case is going to get created in another LOB, to which the current user is not part of. So, to create the Child Case by the current user, in another LOB, we are running the Plugin with System Admin context.

Open plugin Registration tool and Login to your D365 organization and Select the step in InternalHoldActivityPlugin under MicrosoftLabs.WorkBench assembly as shown below

Dynamics 365 for BPO



Open the step and choose System Admin (in the Drop Down available) user in “Run in User’s Context” as shown below.

Dynamics 365 for BPO

Update Existing Step

General Configuration Information

Message

Create

Primary Entity

msdyn_holdactivity

Secondary Entity

none

Filtering Attributes

Message does not support Filtered Attributes

Event Handler

(Plugin) MicrosoftLabs.Dynamics365forBPO.InternalHoldActivi

Step Name

MicrosoftLabs.Dynamics365forBPO.InternalHoldActivityPlugin: Cre

Run in User's Context

Select only System Admin from this dropdown

Execution Order

1

Description

MicrosoftLabs.Dynamics365forBPO.InternalHoldActivityPlugin: Cre

Event Pipeline Stage of Execution

Execution Mode

Deployment

☐ Pre-validation

☐ Asynchronous

☒ Server

☐ Pre-operation

☒ Synchronous

☐ Offline

☒ Post-operation

☐ Delete AsyncOperation if StatusCode = Successful

Unsecure Configuration

Secure Configuration

Update Step

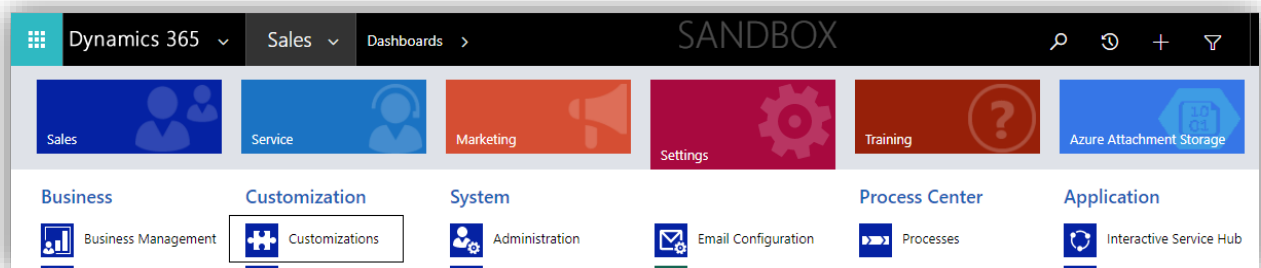
Close

Create Access Team Template

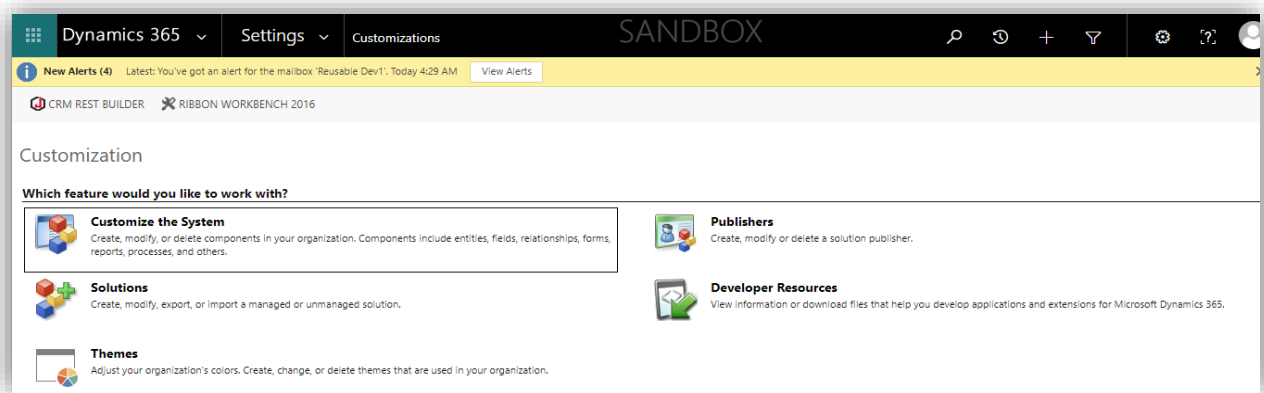
This section helps in create /in setting up the Access Team Template. Access Team Template helps, to read the created child case by the current user, who is not part of another LOB, in which the child case gets created. So, using Access Team Templates, we are allowing current user (who is not part of the child case LOB) to read the Created Child Case record.

Access Team Template Configuration Steps:

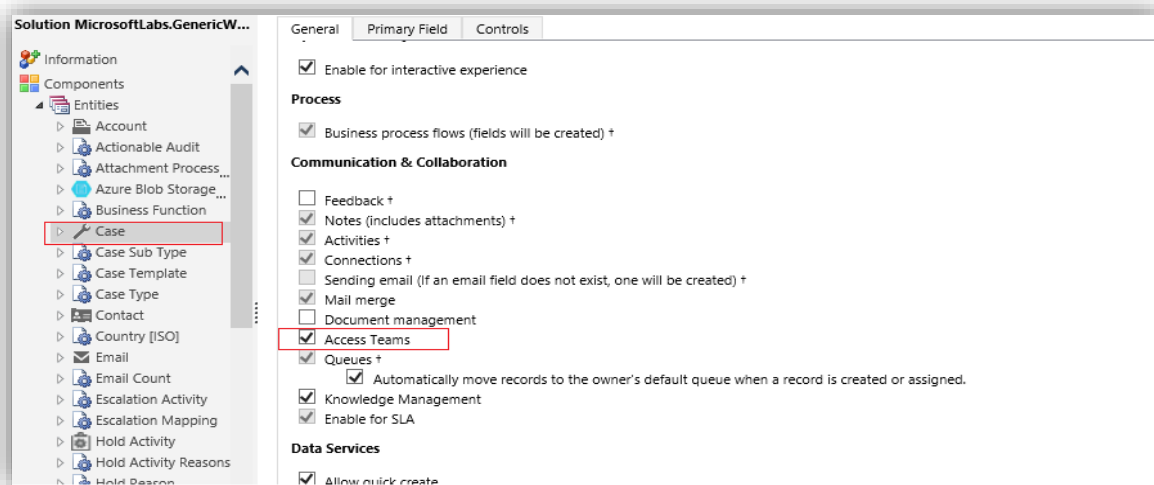
Navigate to Settings -> Customizations -> Customize the System



Dynamics 365 for BPO



From the entity list in the customize system window chose Case entity and select Access Teams in Communication & Collaboration section and save the record as shown below...



Open Case main form and add "Parent Case" field as shown below.

Dynamics 365 for BPO

Summary

CASE DETAILS

Case Title* Case Title

ID Case Number

Subject Subject

Customer Customer

Parent Case Parent Case

Go to “Settings” > “Security” > “Access Team Template”

Click ‘New’ and create below record with **exact name** “Case_Read_Template”, select Read in Access Rights section and save the record.

Team template : TeamTemplate

Team template

Case_Read_Template

General

Name* Case_Read_Template Entity* Case

Description

Share the Case with other sector

Access Rights*

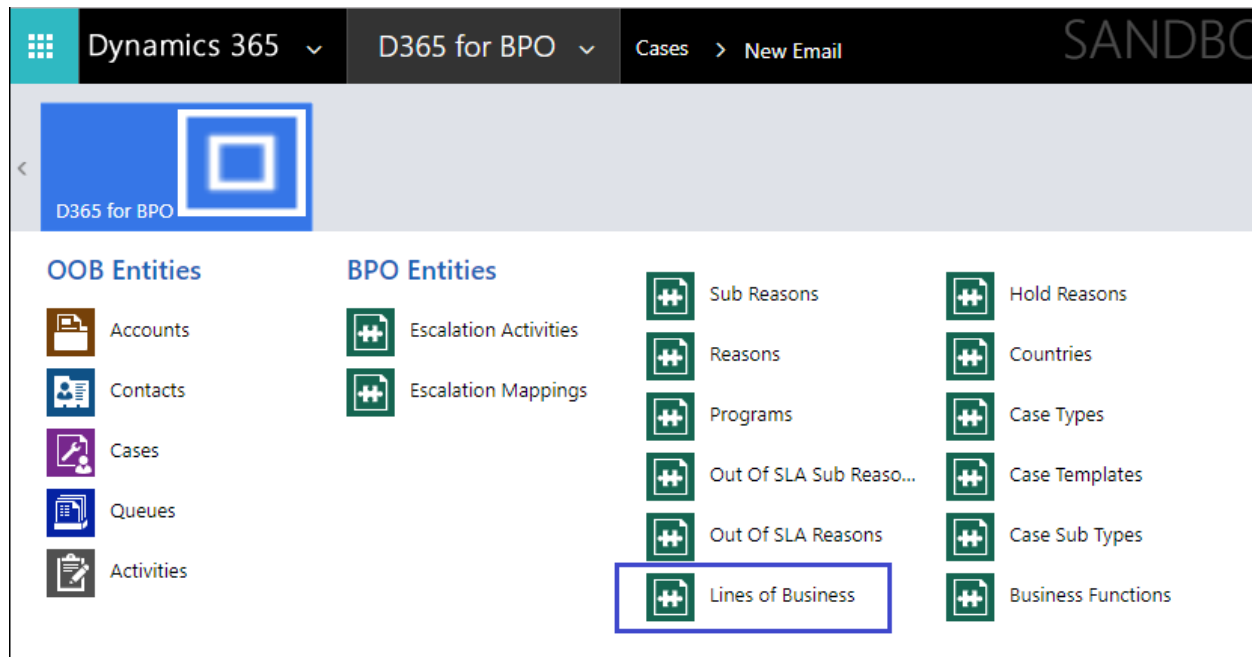
- ☐ Delete
- ☐ Append
- ☐ Append To
- ☐ Assign
- ☐ Share
- ☒ Read
- ☐ Write

Line of Business Configuration for Child Case Creation

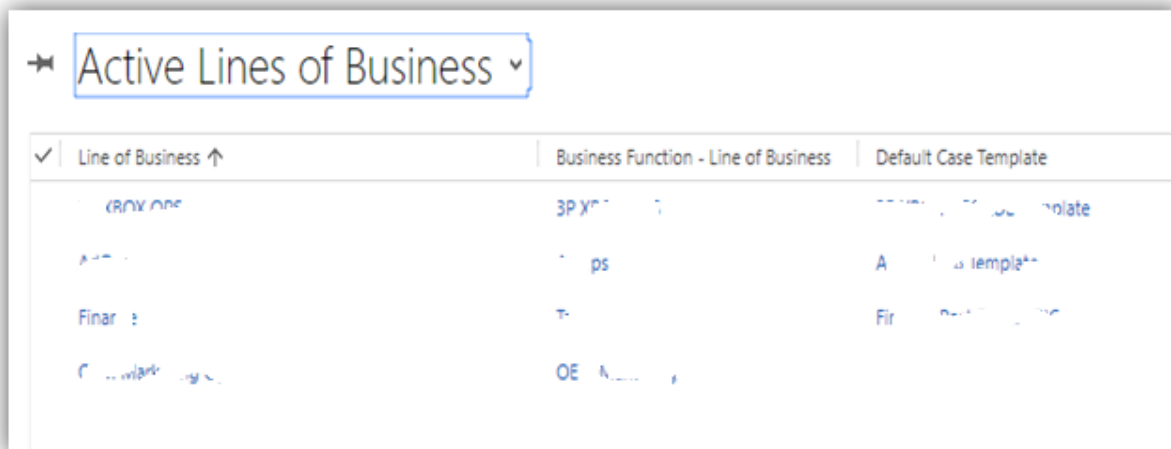
Open Microsoft Dynamics 365

Navigate to BPO Solution -> Lines Of Business

Dynamics 365 for BPO



Select the appropriate Line of Business in the Active Lines of Business results that shows



Enabling Hold Assign & Hold Assign To

Dynamics 365 for BPO

Once Line of Business record is opened, navigate to the “Hold Assign” and “Hold Assign To” fields and change those to Yes and Save the record.



The screenshot shows the 'LINE OF BUSINESS : INFORMATION' form in Dynamics 365, specifically the 'General' tab. The form is for a record with the identifier '3P'. The 'General' tab is selected, and the 'Active' status is shown at the bottom. The form contains the following fields and values:

Field	Value
Line of Business *	3P
Description	--
Business Function - *	3P
Hold Assign	Yes
Hold Assign To	Yes
Default Case Template	3P

Note: Selecting 'Yes' implies that you are allowing your current Line of Business to assign as well as receive child cases from other LOBs.

Default Case Template

The Default Case Template field will determine the Child Case taxonomy when another LOB assigns a child case to your LOB.

Note: There will be only one Default Case Template allowed per LOB.

LINE OF BUSINESS : INFORMATION

3P

General

Line of Business *	3P
Description	--
Business Function - *	3P
Hold Assign	Yes
Hold Assign To	Yes
Default Case Template	3P

Active

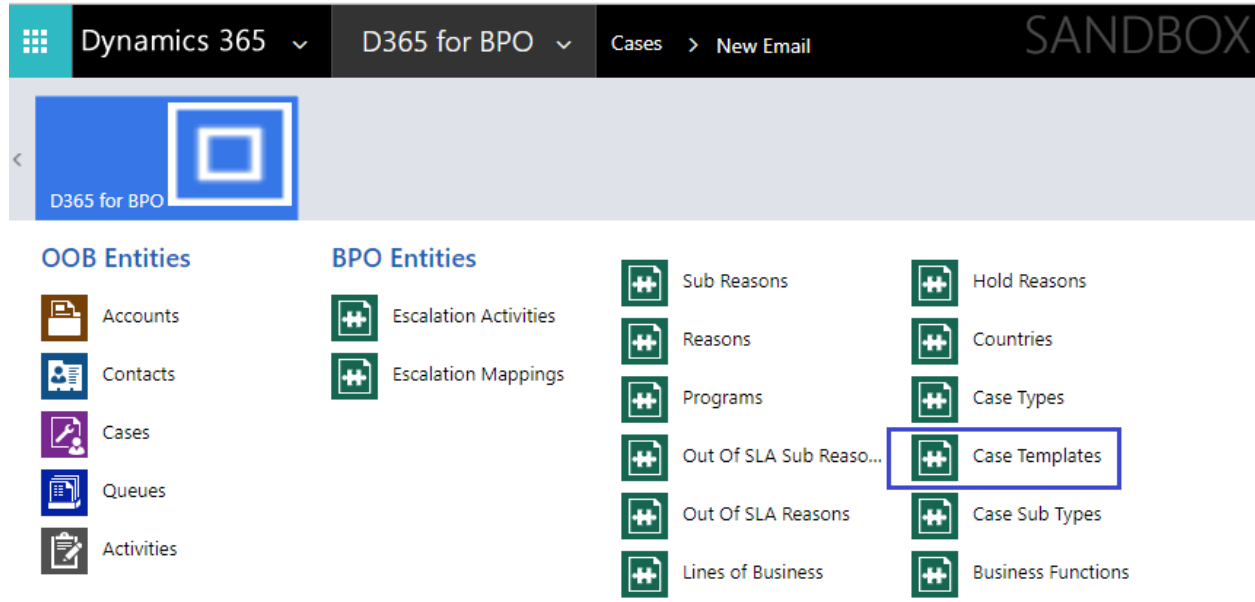
Default Case Template Configuration

To ensure that your Child Cases will be received in the appropriate queue, you must ensure that you have the Taxonomy Metric set up correctly.

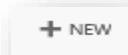
Open Microsoft Dynamics 365

Navigate to BPO Solution -> Case Templates

Dynamics 365 for BPO



Create a new Case Template for your Child Case creation



Ensure that the Business Function, Line of Business, Case Type, Case Sub Type, Queue, and any other available criteria are selected to match the taxonomy of your Default Case Template.

CASE TEMPLATE : INFORMATION	
New Case Template	
Case Template Name *	--
Owner *	
Case Status	Active
Suppress Notification:	No
Business Function *	--
Line of Business *	--
Program *	--
Case Type *	--
Case Sub Type *	--
Reason *	--
Sub Reason	--
Country [Processed]	--
Processing Center	--
Product	--
Root Cause	--

Active

Note: This will ensure that when the Child Case is created using the Default Case Template.

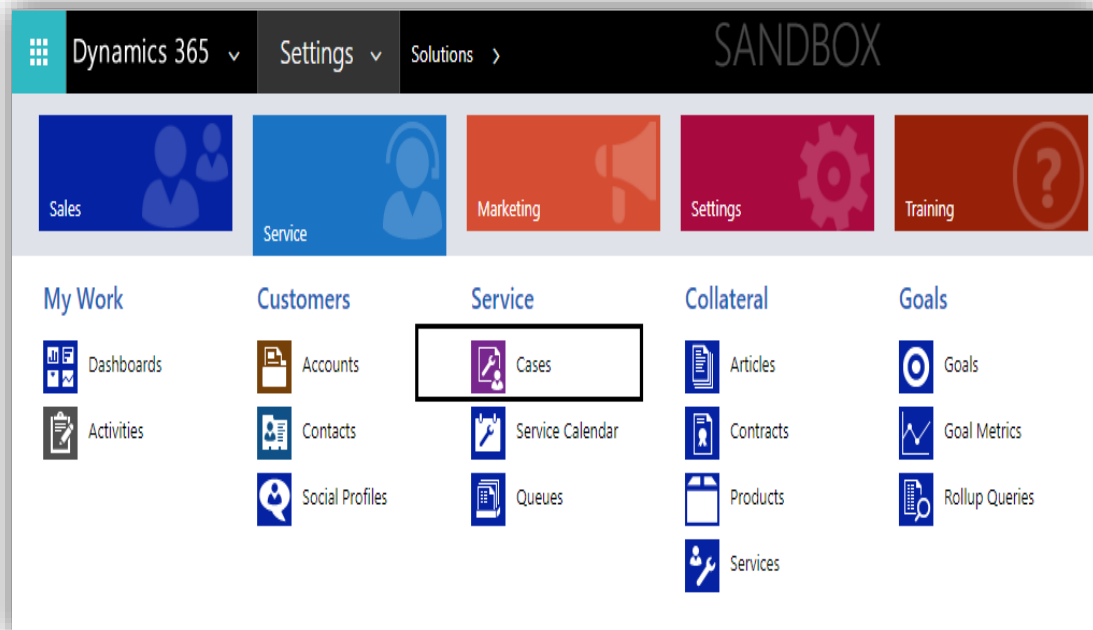
9.2 End user Experience

Once the configuration is complete, and you wish to place a case on 3rd Party Hold and assign it to a specific Line of Business, complete the following steps.

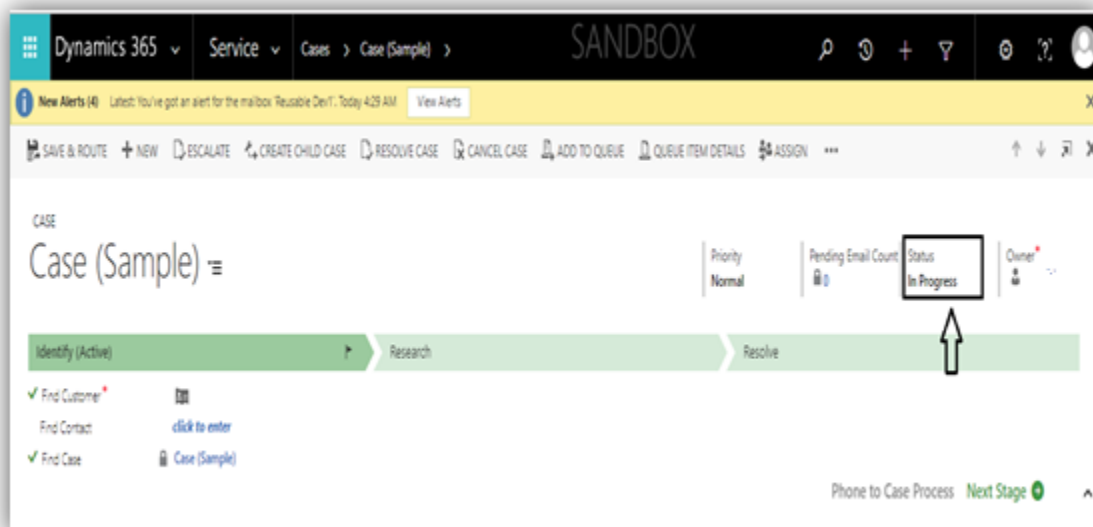
Login to Dynamics 365.

Navigate to Service -> Cases

Dynamics 365 for BPO

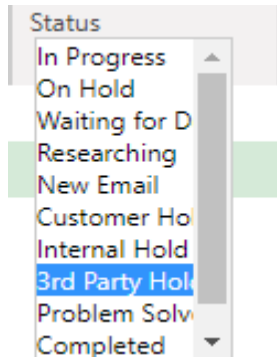


Click on NEW CASE, to create a new Case Record and provide required information.



Now change the Status to “3rd Party Hold”. Then we give get a confirmation alert, whether user wants to open a new hold activity or not. If user clicks on Cancel, simply confirmation dialog closes.

Dynamics 365 for BPO



If user clicks on OK, a Hold Activity form gets opened in pop up as shown below... with case ticket number appended with Case Status Reason, as shown below...

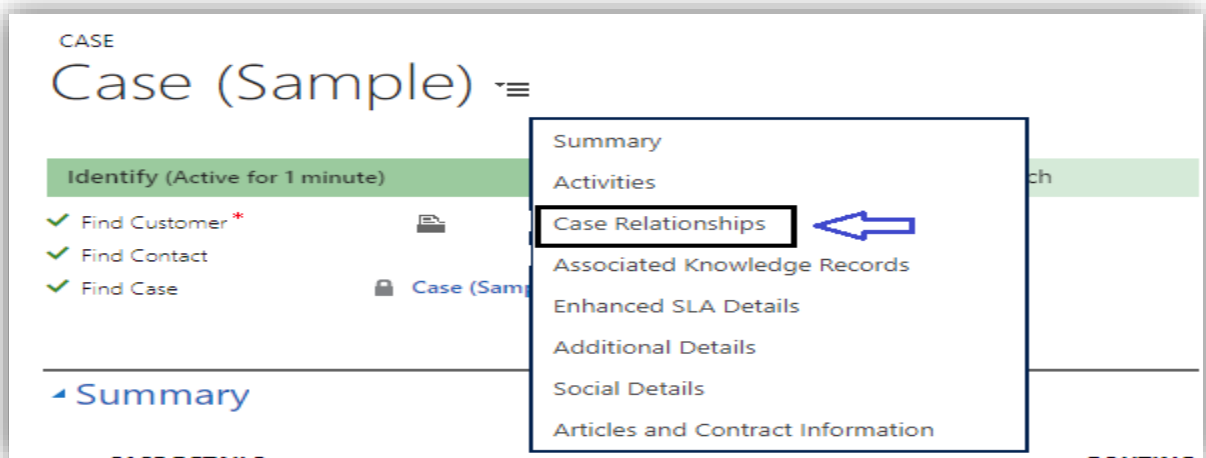
Select the appropriate Reason and Responsible By, change the Assigned To Group to Internal.

When Internal is selected, the LOB field will appear. Select the LOB you wish to have the Child Case created for. (On Create on Hold Activity, only Child Case create plugin triggers).

HOLD ACTIVITY : INFORMATION	
CAS-00152-B6H2Q7 ...	
Hold Type Customer	Status* Open
Party Initiated*	
General	
Title*	CAS-00152-B6H2Q7 is on Customer Hold
Reason*	Operations Team
Responsible By*	
Description	Description goes here...
Child Case Creation	
Assigned To Group*	Internal
LOB*	3P
Select Case Template*	3P

Click Save at the bottom of the Hold Activity form

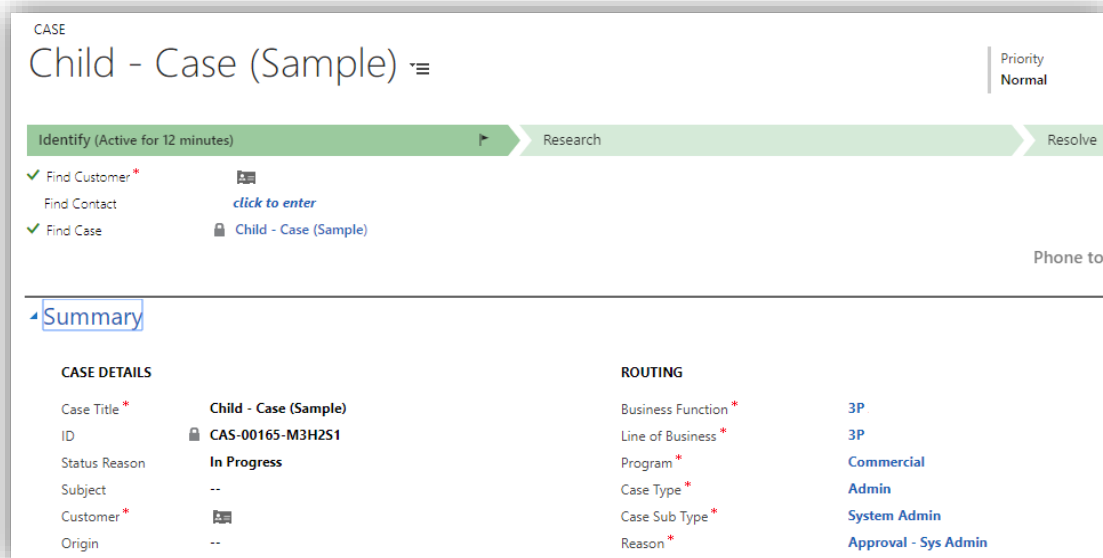
The Child Case should appear in the Case Relationships tab of the parent case.



Once, we are on the Case Relationships tab, we can see the Child Case created as shown below



Click on the Child Case record and it redirects to a created child case and the Child Case's taxonomy should match what is in the Default Case Template.



Trouble Shoot Tips

- Please make sure that the Name field in the Access Team Template record is correctly updated as Case_Read_Template (which is case sensitive).
- Please make sure that the Run in User's Context of InternalHoldActivityPlugin is CRM System Admin in plugin Registration tool.
- If Child Case is not getting created, please make sure that you are choosing Assigned To Group field to Internal and LOB and Select Case Template at the time of Hold Activity creation.

10. Additional Solution references

10.1 Attachment Management Solution

Attachment Management solution is an add-on feature to dynamics 365 CRM Online to manage notes and email attachments using Azure blob storage. Enables business users to optimize use of CRM Online storage and retrieve files on-demand through Dynamics CRM. It also offers additional optional feature of multiple files upload and download with a preview of the attachment. This solution is built on Dynamics 365 and seamlessly works on Dynamics CRM 2016 and above. Any suggestions/feedback from your end using Attachment Management would help us at Microsoft Labs to define the roadmap of this solution to its future. Microsoft Labs does not offer an ongoing customer support for this solution. It would be ideal to test run the solution in your pre - production environments before installing in your production environment.

Click here for [Configuration and Functionality](#)

10.2 Actionable Audit

Microsoft Dynamics 365 comes with several tools to help you manage data. One of these is the auditing feature, which allows you to track changes made to data in Dynamics 365. It also tracks each time a user logs into your system. If auditing is enabled, CRM automatically creates logs for the changes that are tracked. But, we cannot access the System Auditing Entity. This Actionable Audit solution will provide the user to track the audit history of the configured entities and will be able to generate the reports on the Audited data. Also, provides user friendly web resource for Case entity with the Search, Export to CSV options

Click here for [Configuration and Functionality](#)

10.3 Email Alert

The Email Alert Solution is an add-on feature to dynamics 365 CRM to get an overview of received unread CRM emails on a Case. It enables users to get the unread mails count which were received on a case. Feature Benefits: No need to navigate to Emails section of a case to see the received emails

- Pending Email Count field on a case form will get updated with number of unread received emails. Option to make Unread/Read on Email form
- Users can mark as Read/Unread the email after opening. Accordingly, the Pending email count would be updated. This solution is built on Dynamics 365 and seamlessly works on Dynamics CRM 2016 and above

Click here for [Configuration and Functionality](#)

10.4 Email Machine Learning

Dynamics 365 for BPO

Email Machine Learning solution is an add-on feature to dynamics 365 CRM(Online) to translate email text messages into English and analyze its sentiments using Azure cognitive services. This feature enables organizations in understanding customer's likes and dislikes. It also helps business users to make sure it gives the reader intended impression.

Email Machine Learning offers

- Language translation email text message -
- Translate text message into English by using Azure Cognitive Text translation API.
- Sentiment analysis score for email text message -
- Azure Cognitive Text analytics API returns a numeric score between 0 and 1. Scores close to 1 indicate positive sentiment, while scores close to 0 indicate negative sentiment. Sentiment score is generated using classification techniques.

This solution is built on Dynamics 365 and seamlessly works on Dynamics CRM 2016 and above Any suggestions/feedback from your end using Email Analytics would help us at Microsoft Labs to define the roadmap of this solution to its future. Microsoft Labs does not offer an ongoing customer support for this solution. It would be ideal to test run the solution in your pre-production environments before installing in your production environment.

Click here for [Configuration and Functionality](#)

10.5 Speech To Text

The Speech-to-Text solution will help users to convert the audio into text in given entity using Azure Cognitive Services (Bing Speech API). The solution enables users to transcribe audio into text in real time and supports to receive the intermediate results of the words that have been recognized so far. The solution also supports end-of-speech detection. In addition, users can choose additional formatting capabilities, like capitalization and punctuation, masking profanity, and text normalization. It supports multiple local languages also.

Click here for [Configuration and Functionality](#)