Text (SMS) Messaging for Dynamics Customer Service

Analysis Document

User guide manual

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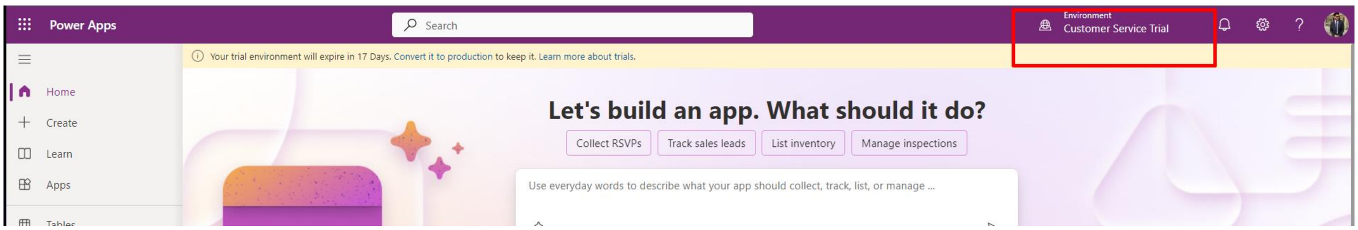
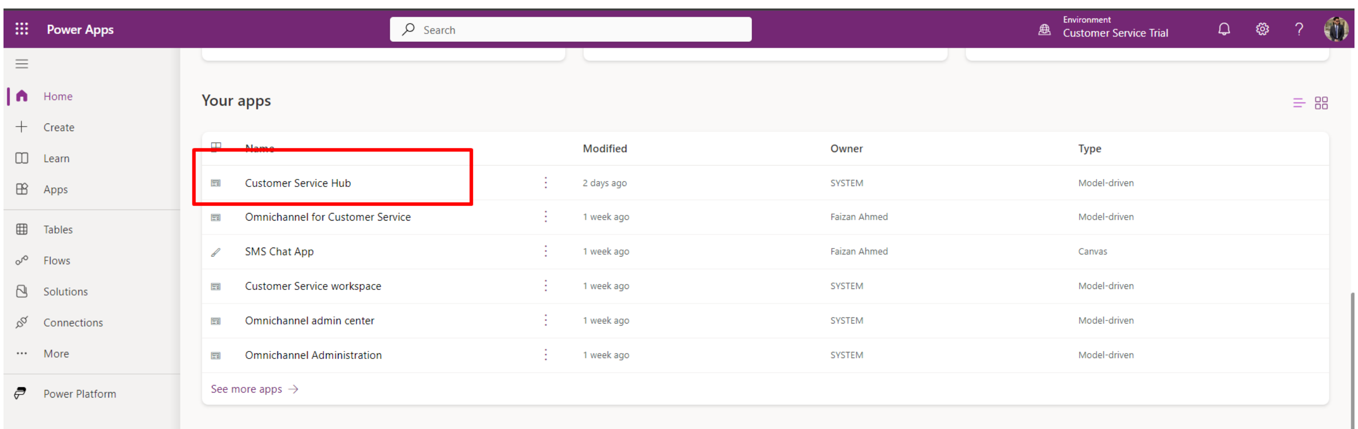
Text (SMS) Messaging For Dynamics Customer Service

1. Accessing Dynamics 365 Customer Service

- Step 1: Log in to your Dynamics 365 account.
- Step 2: Access the website: https://make.powerapps.com/
- Step 3: Navigate to the relevant Environment

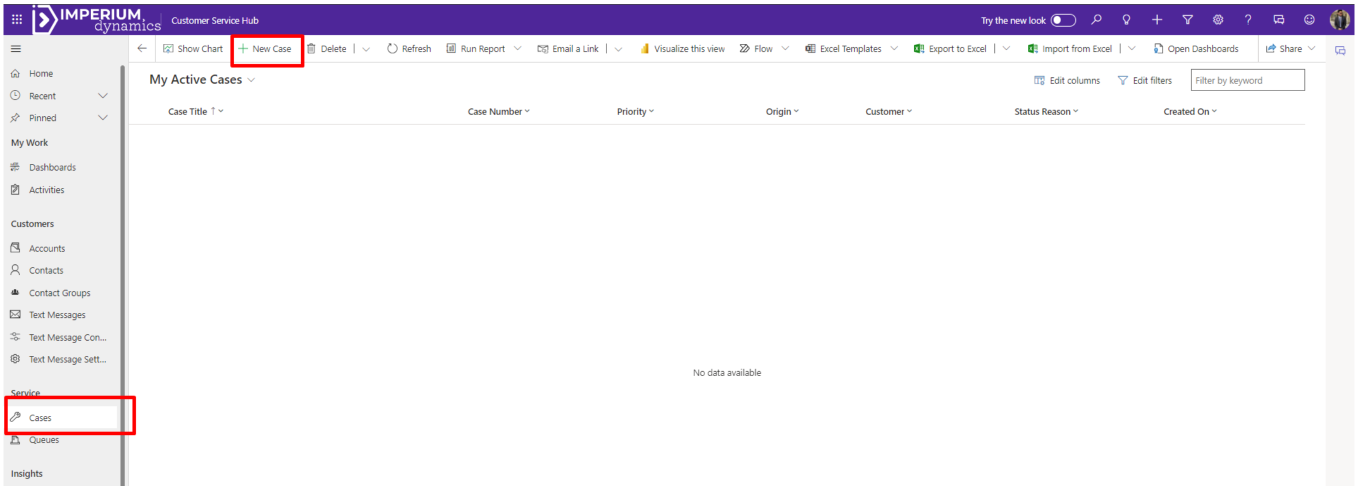


- Step 4: Navigate to the Dynamics 365 Customer Service Hub. This can typically be done from the home page or app launcher.

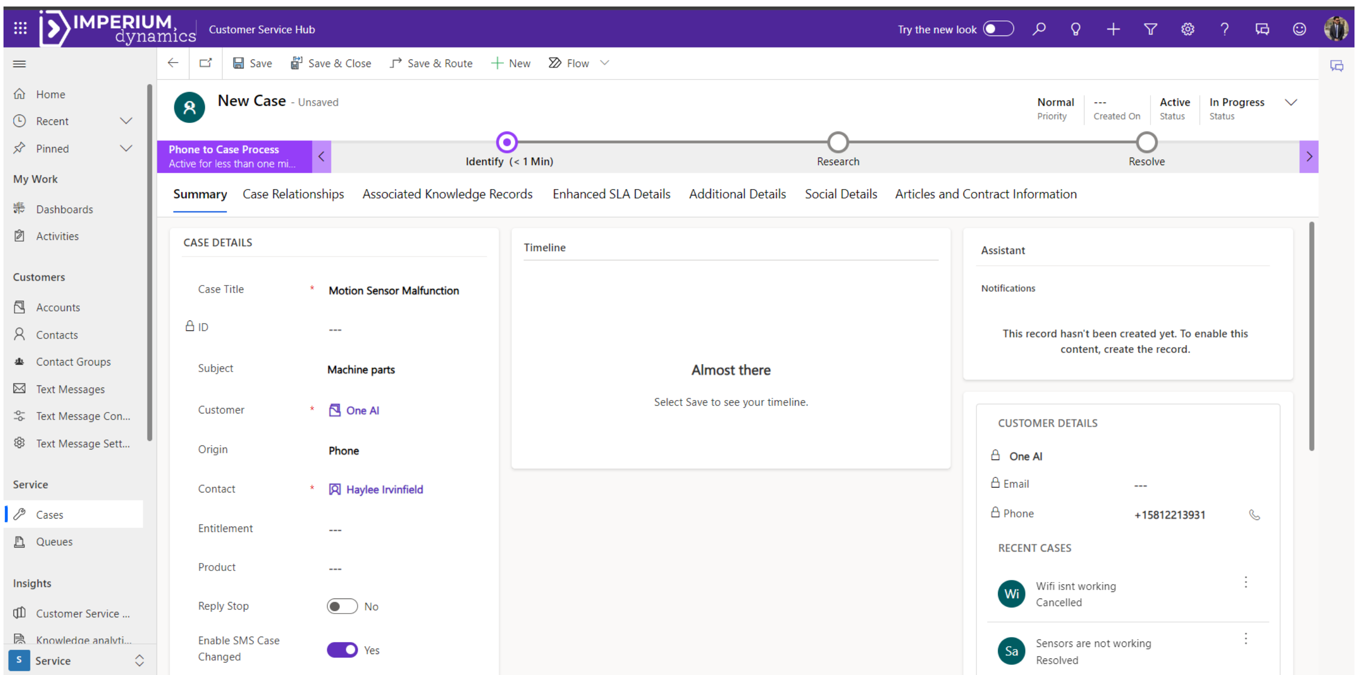


2. Creating a New Case

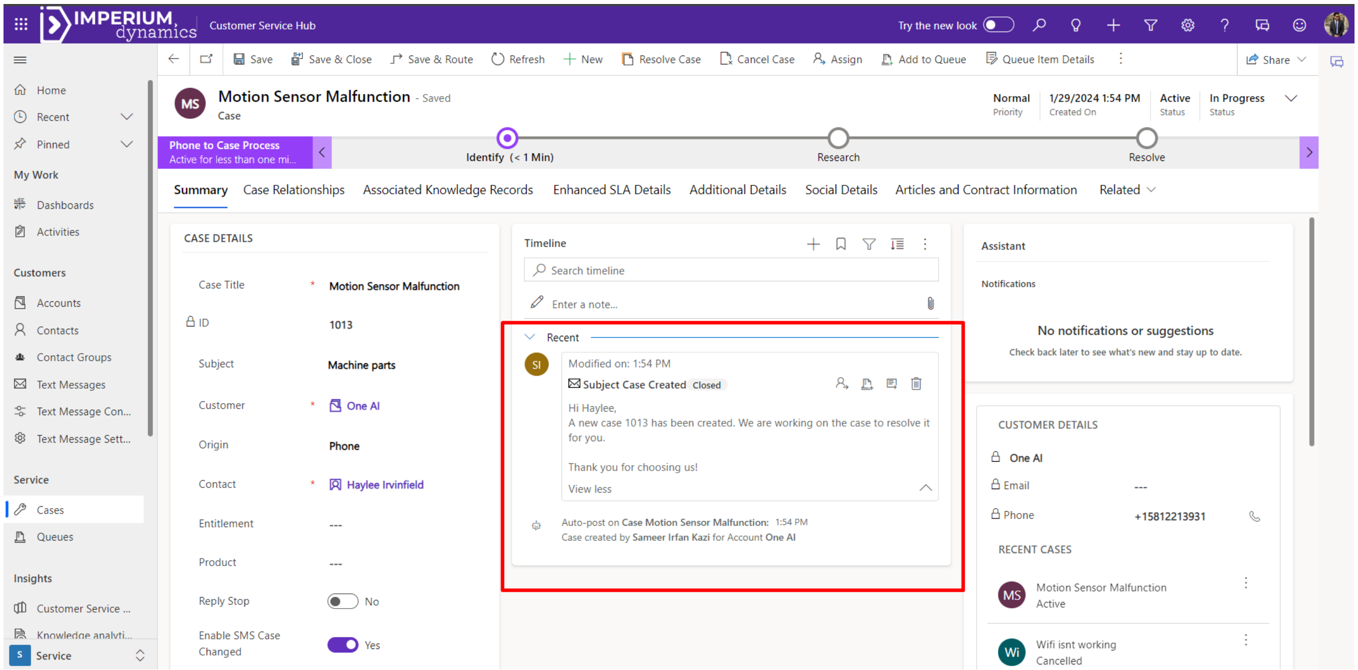
- Step 1: In the Customer Service module, navigate to the "Service" section in the left-hand navigation pane.
- Step 2: Click on “Cases” to view the list of existing cases.
- Step 3: To create a new case, click on “New” in the toolbar.



- Step 4: Fill in the case form:
    - Title: Enter a concise title for the case.
    - Customer: Select the customer from the existing records.
    - Description: Provide a detailed description of the issue or request.
    - You may also fill in other fields as required, such as Case Type, Priority, etc.



- Step 5: Click “Save” in the top navigation bar to create the case.
- When the case is created the Contact associated with the company is automatically notified about the Case creation via a text message that Reads:
  “Hi [Customer Name],
  A new case [id] has been created. We are working on the case to resolve it for you.”

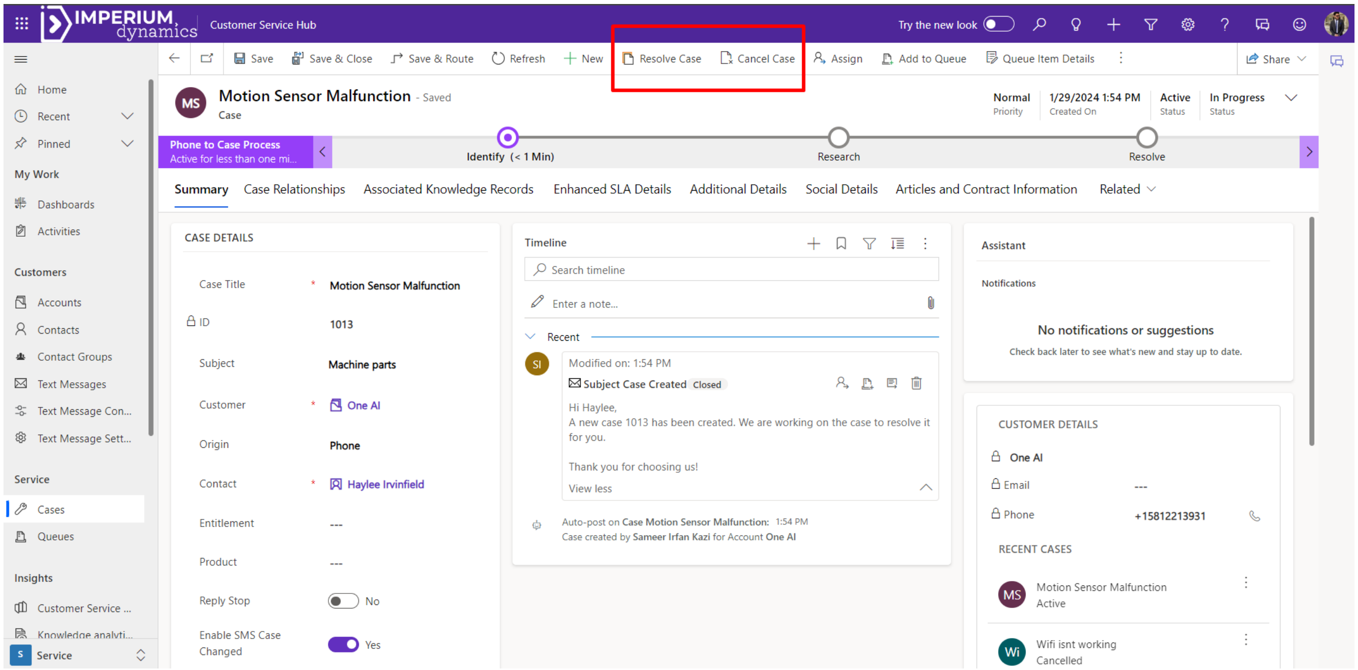


3. Updating a Case

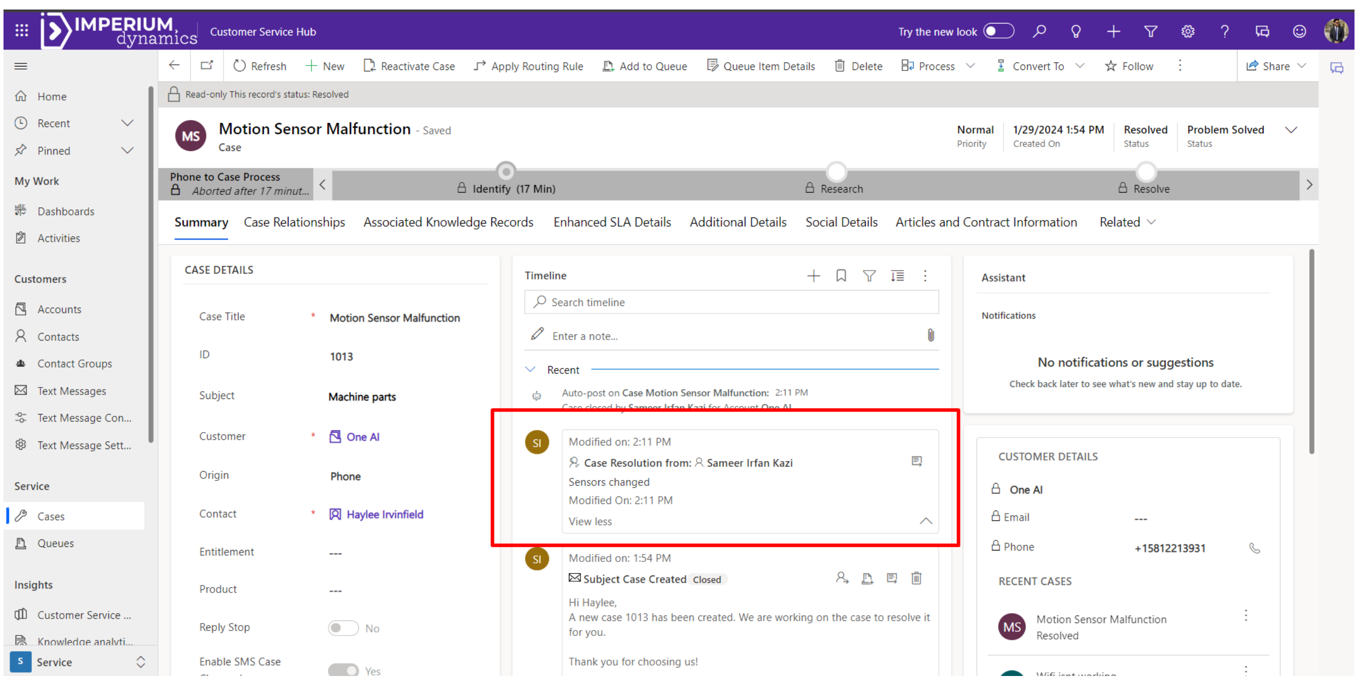
- Step 1: Navigate to the "Cases" section as before.
- Step 2: Open the case you want to update by clicking on the case title.
- Step 3: To update information:
    - Edit fields directly, such as the description, status, or priority.
    - Add any notes or attachments using the "Notes" section at the bottom of the form.
- Step 4: After making changes, click "Save".

4. Resolving, Reactivating or Cancelling a Case

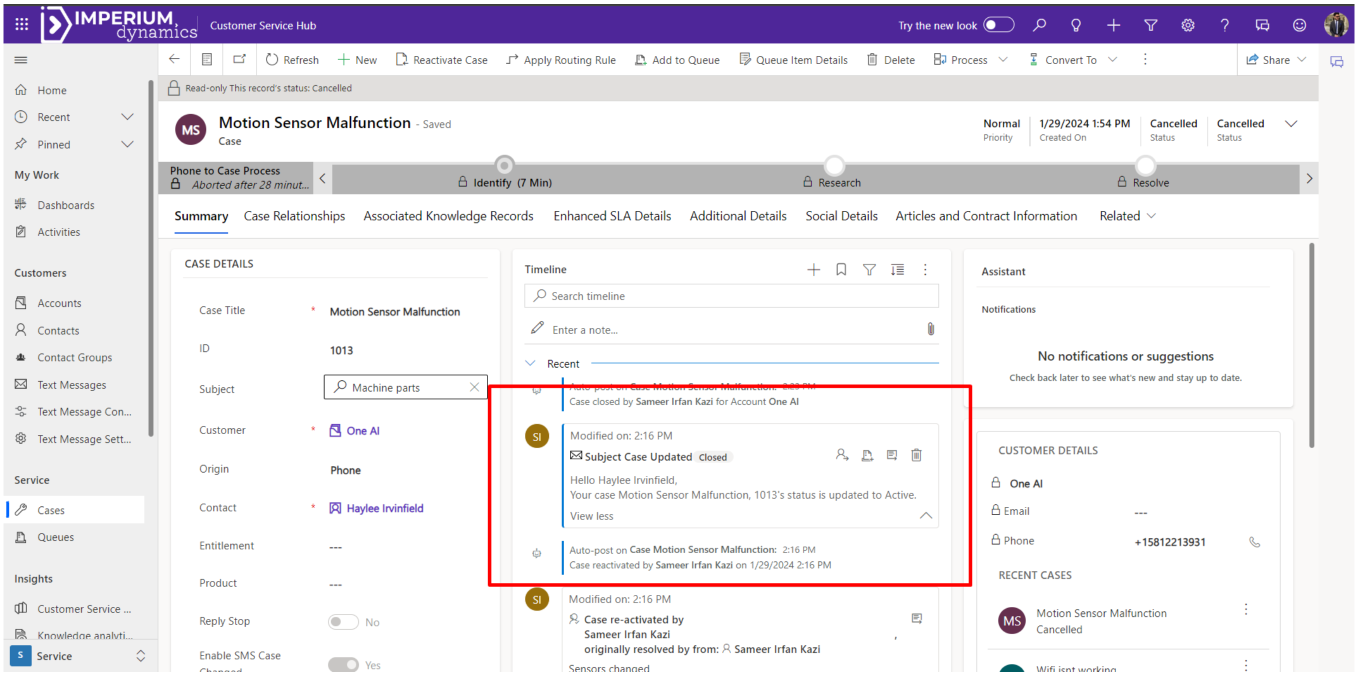
- To Resolve a Case:
    - Open the case as described above.
    - Click on "Resolve Case" at the top of the case form.
    - Fill in the "Resolution" and "Description" in the dialog box that appears.
    - Click "OK" to close the case as resolved.
- To Cancel a Case:
    - Open the case.
    - Click on "Cancel Case" at the top of the case form.
- To Reactivate a Case:
    - Open the Resolved/Cancelled case.
    - Click on "Reactivate Case" at the top of the case form.
- Click "Save".



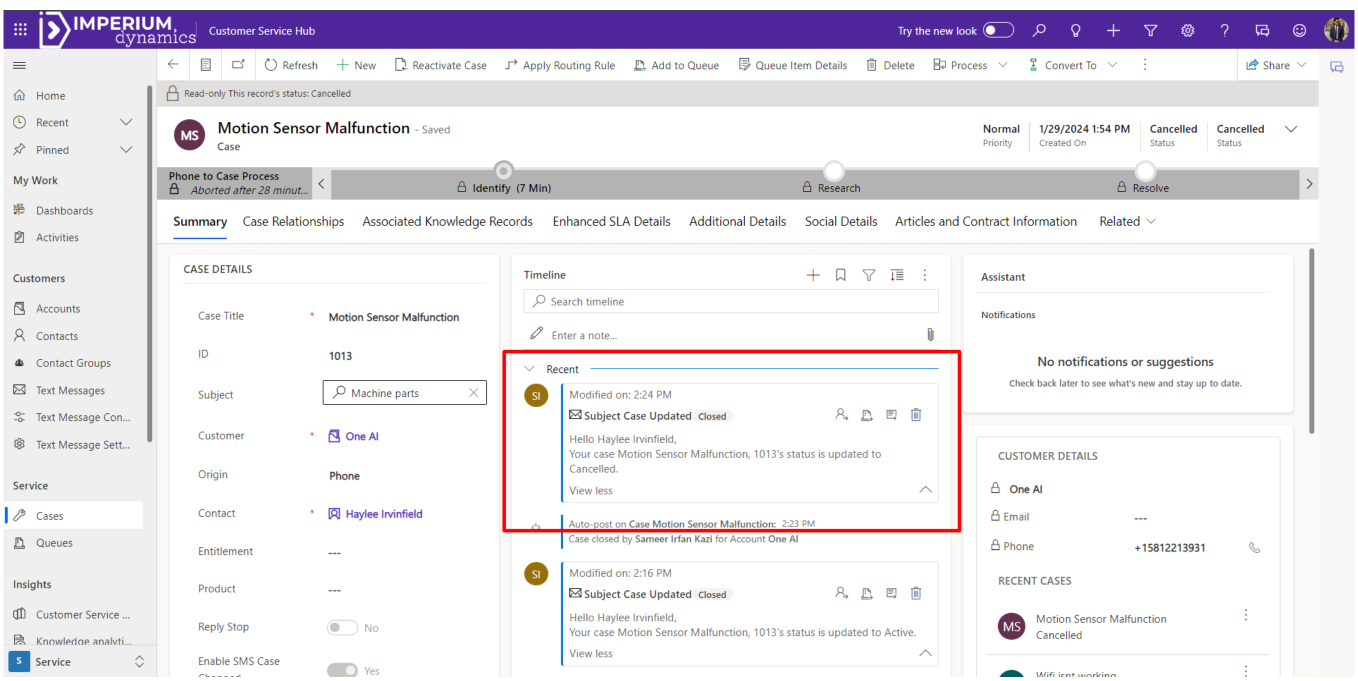
- When the case status is updated to *Resolved* the Contact associated with the company is automatically notified about the update in the Case Status via a text message that reads:
  "Hello [Customer Name],
  Your case [title], [id] is resolved. Resolution Date = [date]. "



- When the case status is updated to *Reactivated* the Contact associated with the company is automatically notified about the update in the Case Status via a text message that reads:
  "Hello [Customer Name],
  Your case [title], [id] status is updated to Active."

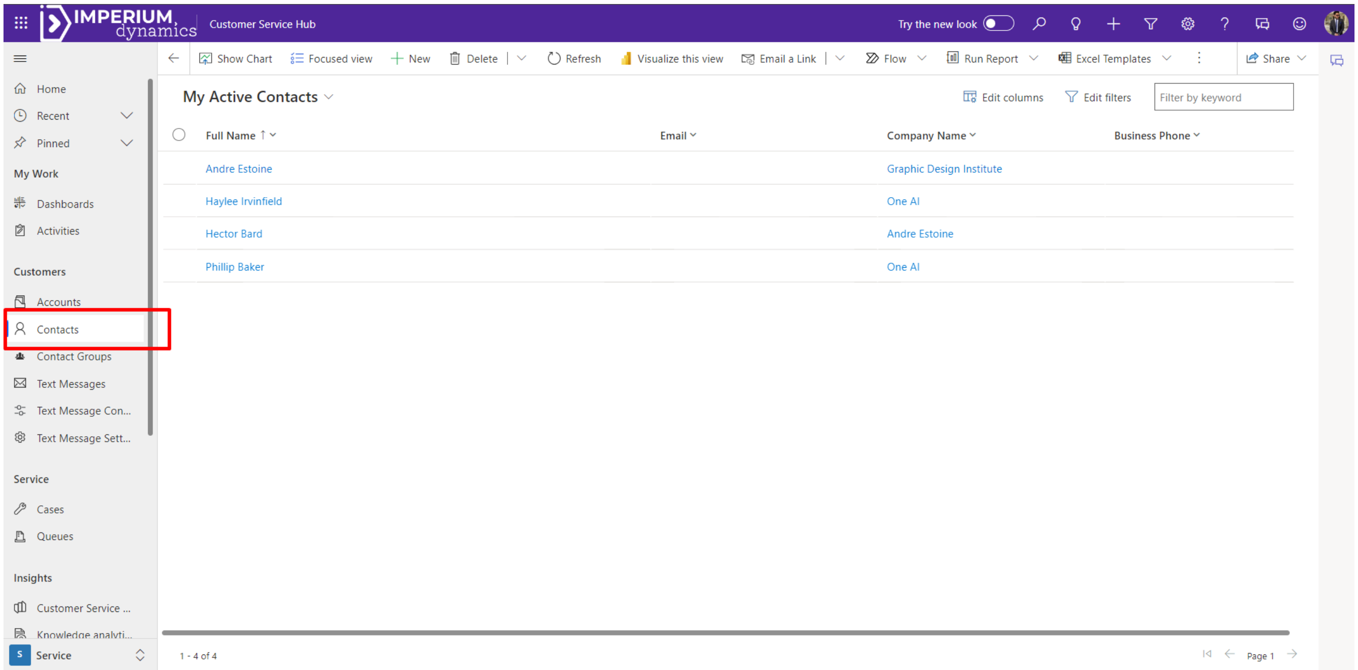


- When the case status is updated to *Cancelled* the Contact associated with the company is automatically notified about the update in the Case Status via a text message that reads: *"Hello [Customer Name],*
  Your case [title], [id] is updated to Cancelled. "



5. Using Text Messaging to coordinate with the Customer contact

- In the Customer Service Hub, go to Contacts. This can be found in the navigation bar on the left.



- Find the Customer Contact you want to text with and open the record.
  - From the Contact form navigate to the "SMS Chat" tab and use the chat window to talk with the lead via text.