

Text (SMS) Messaging for Dynamics Customer Service

Analysis Document

User guide manual



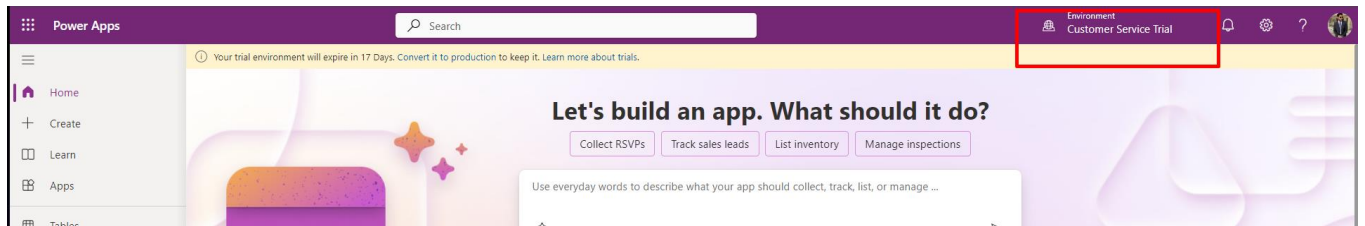
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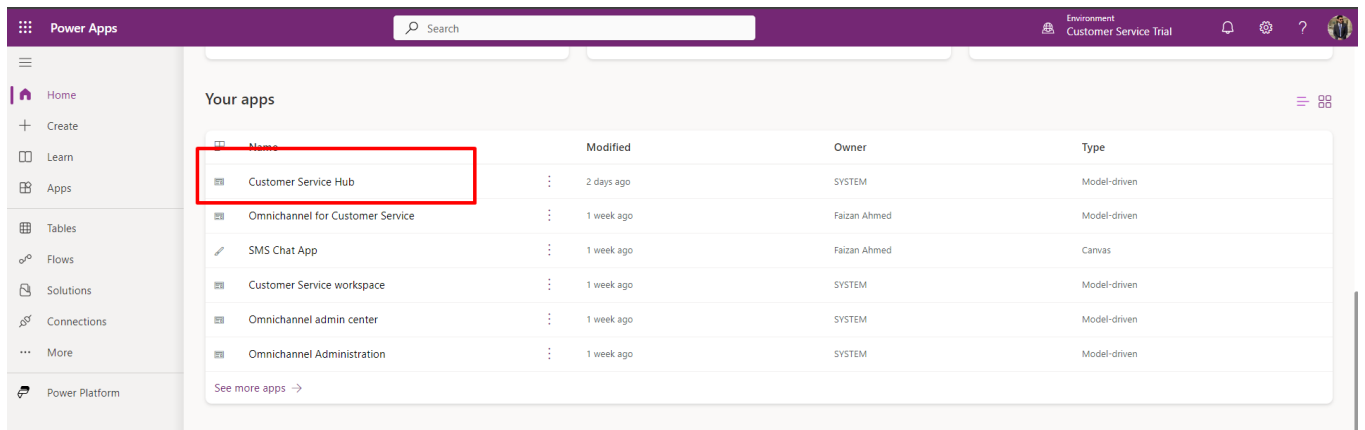
Text (SMS) Messaging For Dynamics Customer Service

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

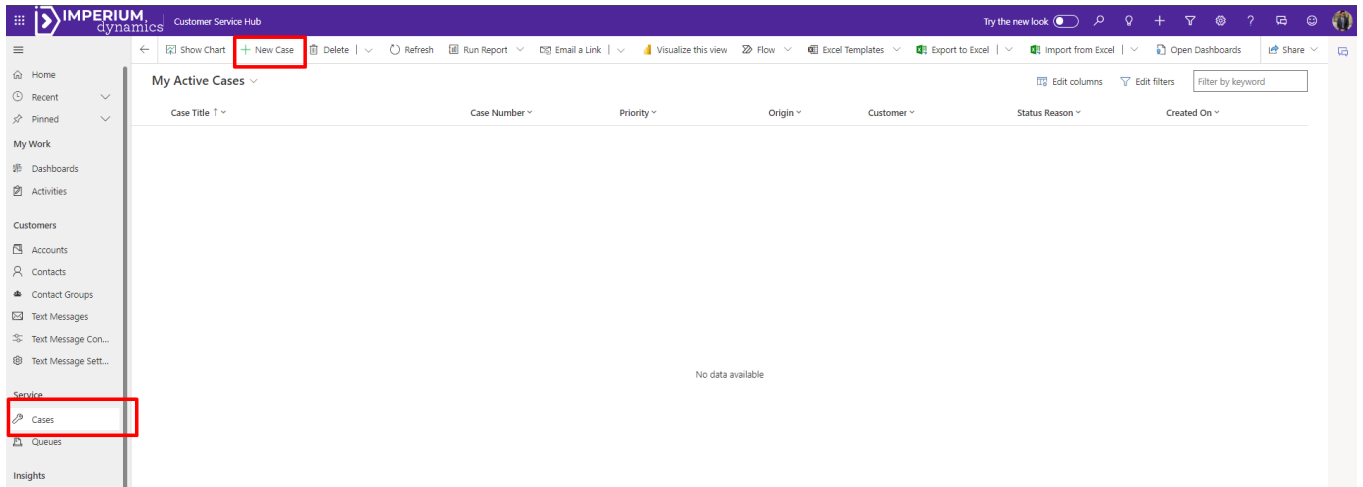


- Step 4: Navigate to the Dynamics 365 Customer Service Hub. This can typically be done from the home page or app launcher.

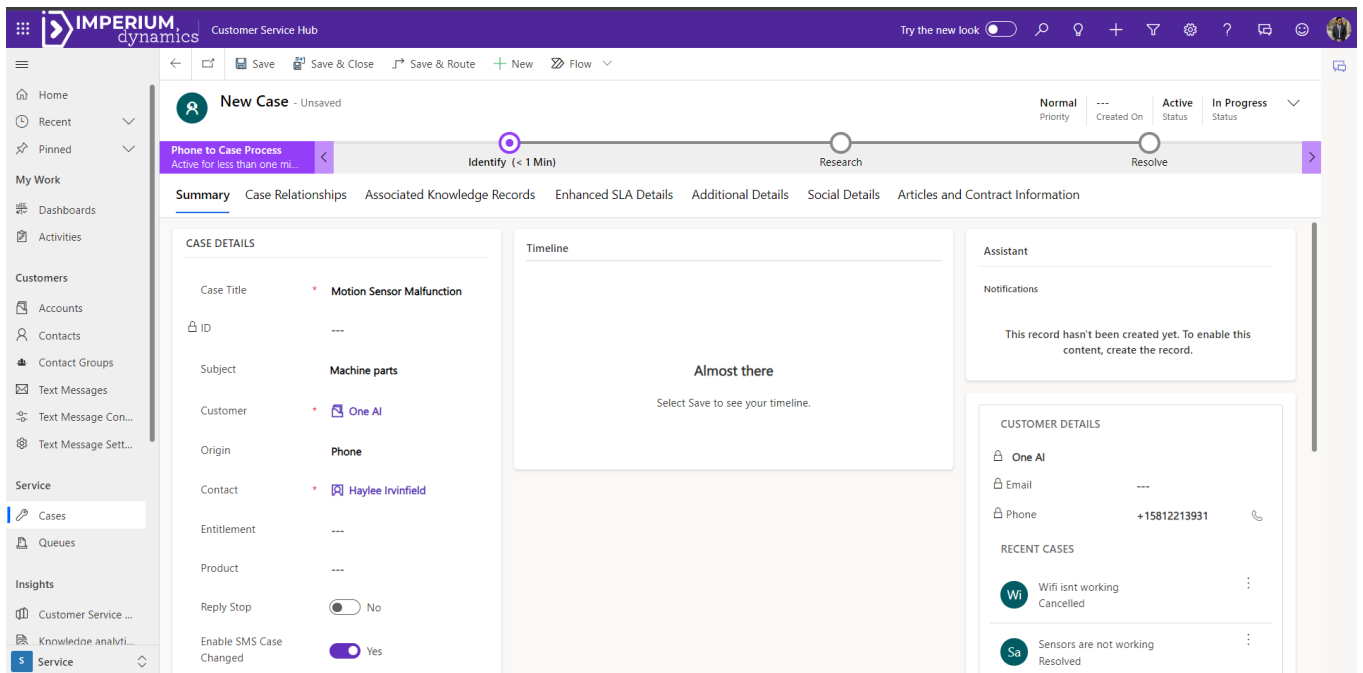


2. Creating a New Case

- 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.

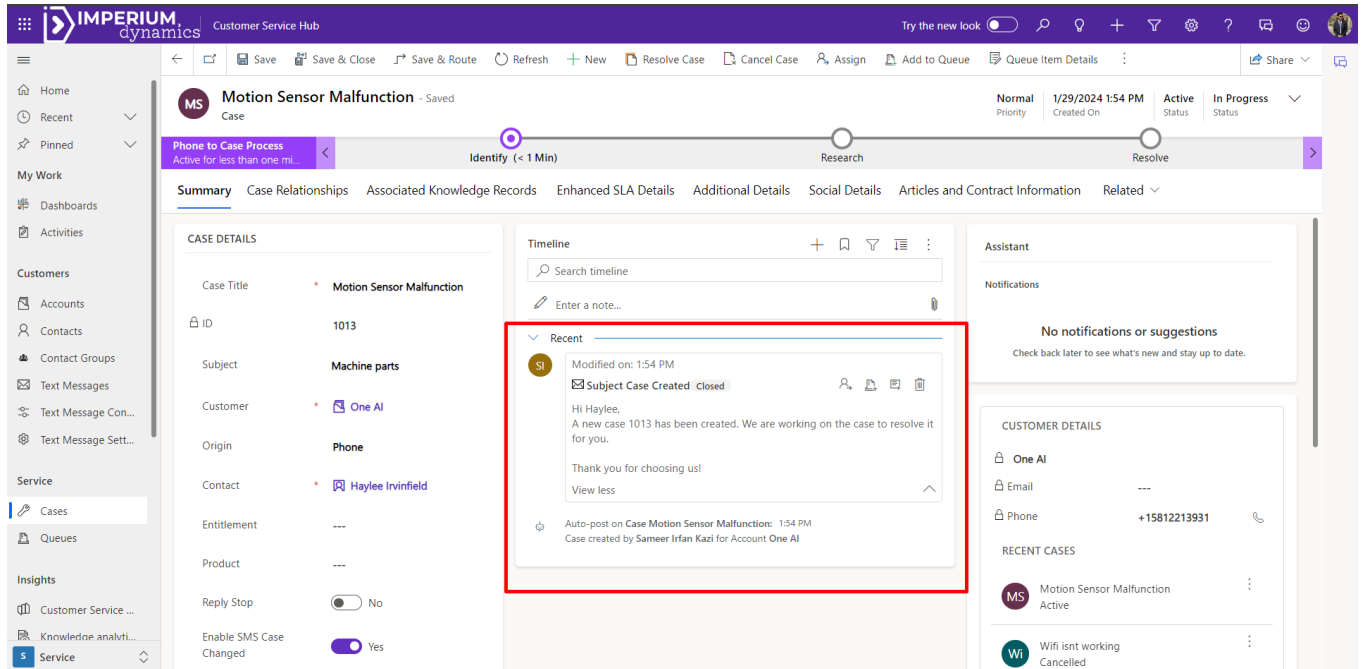


- Step 4: Fill in the case form:
 - o Title: Enter a concise title for the case.
 - o Customer: Select the customer from the existing records.
 - o Description: Provide a detailed description of the issue or request.
 - o You may also fill in other fields as required, such as Case Type, Priority, etc.



- 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.”*

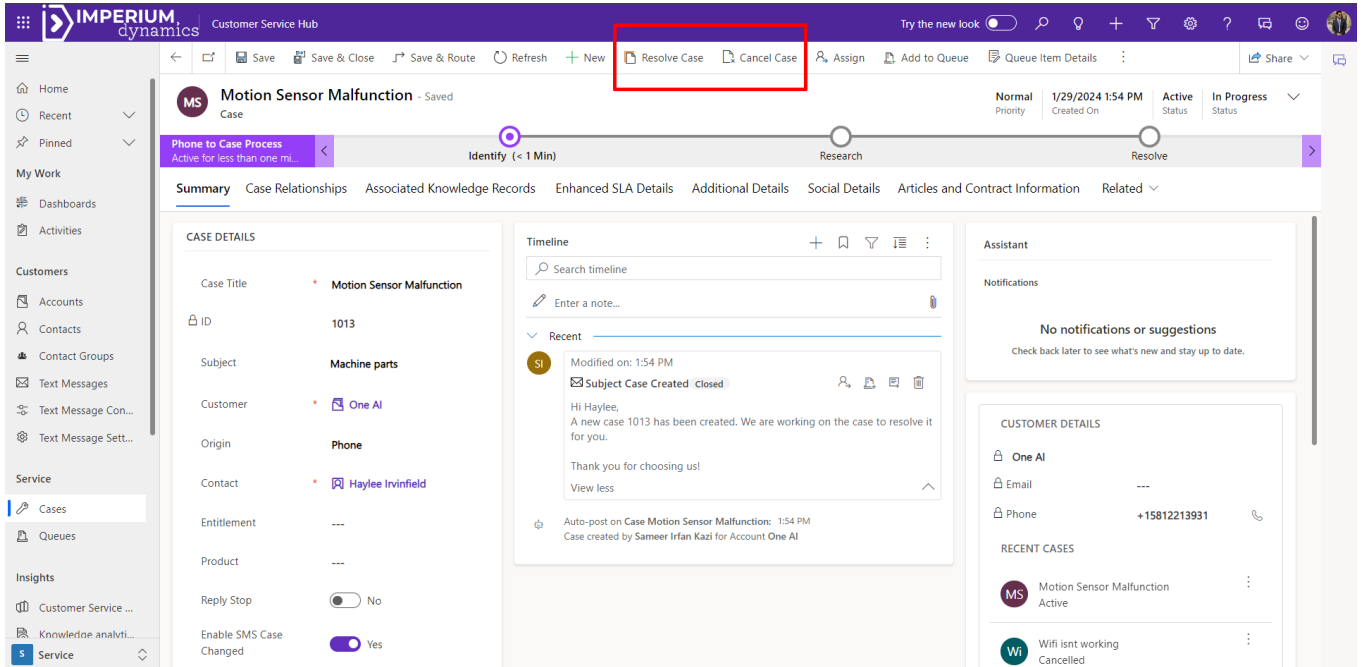


3. Updating a Case

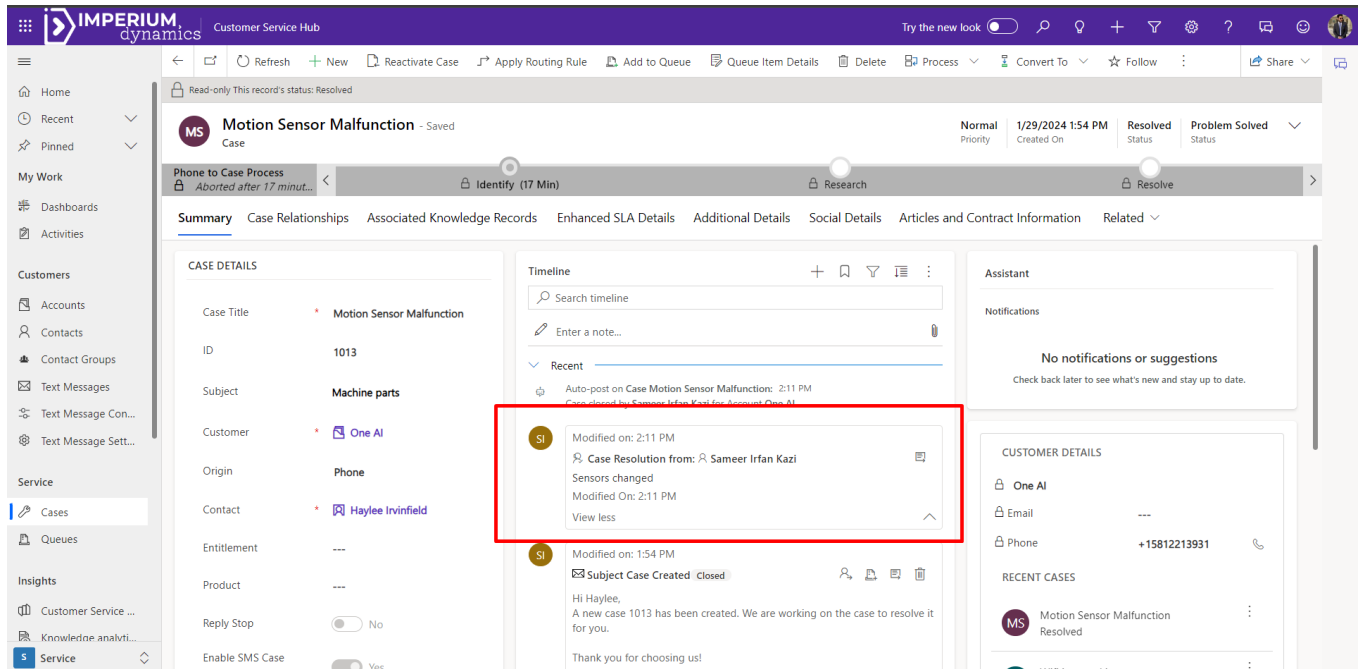
- Step 1: Navigate to the “Cases” section as before.
- Step 2: Open the case you want to update by clicking on the case title.
- Step 3: To update information:
 - o Edit fields directly, such as the description, status, or priority.
 - o Add any notes or attachments using the “Notes” section at the bottom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

4. Resolving, Reactivating or Cancelling a Case

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

Customer Service Hub

Try the new look

MS Motion Sensor Malfunction - Saved

Normal Priority 1/29/2024 1:54 PM Created On Cancelled Status Cancelled Status

Phone to Case Process Aborted after 28 minut... Identify (7 Min) Research Resolve

Summary Case Relationships Associated Knowledge Records Enhanced SLA Details Additional Details Social Details Articles and Contract Information Related

CASE DETAILS

Case Title Motion Sensor Malfunction

ID 1013

Subject Machine parts

Customer One AI

Origin Phone

Contact Haylee Irvinfield

Entitlement

Product

Reply Stop No

Enable SMS Case Yes

Timeline

Search timeline

Enter a note...

Recent

Auto-post on Case Motion Sensor Malfunction: 2:16 PM Case closed by Sameer Irfan Kazi for Account One AI

Modified on: 2:16 PM

Subject Case Updated Closed

Hello Haylee Irvinfield, Your case Motion Sensor Malfunction, 1013's status is updated to Active. View less

Auto-post on Case Motion Sensor Malfunction: 2:16 PM Case reactivated by Sameer Irfan Kazi on 1/29/2024 2:16 PM

Modified on: 2:16 PM

Case re-activated by Sameer Irfan Kazi originally resolved by from: R Sameer Irfan Kazi

Sensors changed

Assistant

Notifications

No notifications or suggestions

Check back later to see what's new and stay up to date.

CUSTOMER DETAILS

One AI

Email ---

Phone +15812213931

RECENT CASES

MS Motion Sensor Malfunction Cancelled

Wifi list working

- 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. “*

Customer Service Hub

Try the new look

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Normal Priority 1/29/2024 1:54 PM Created On Cancelled Status Cancelled Status

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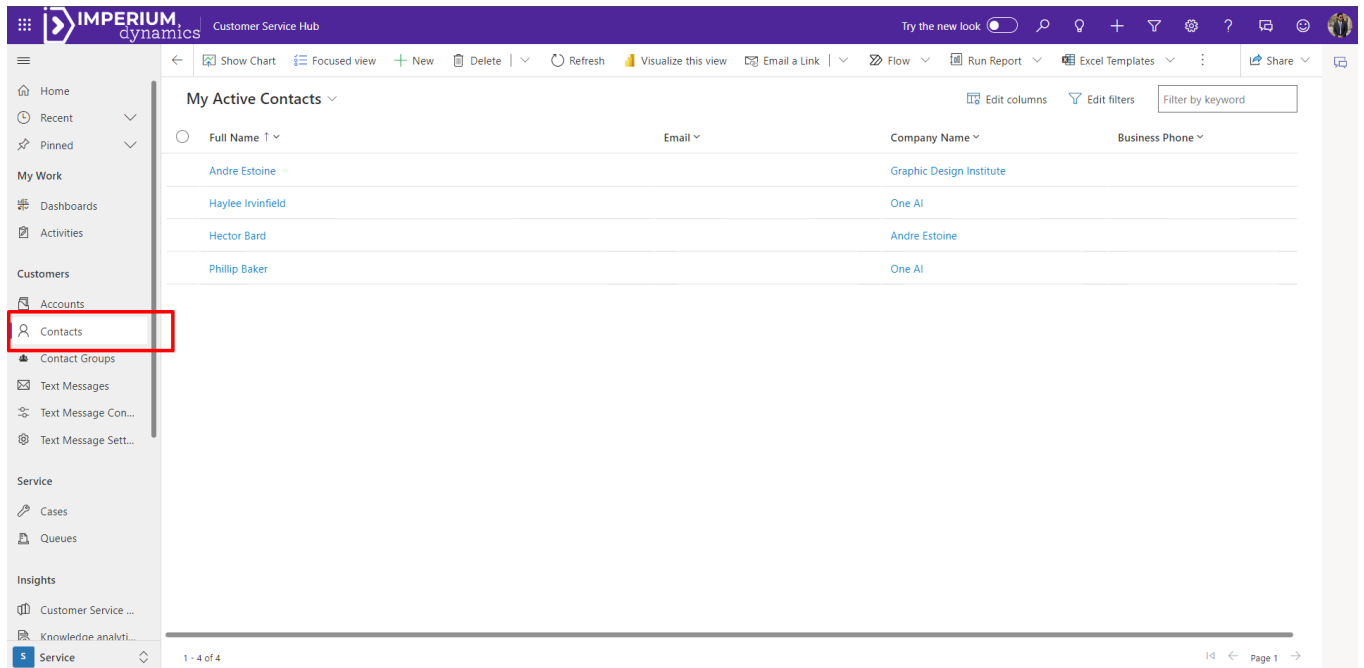
RECENT CASES

MS Motion Sensor Malfunction Cancelled

Wifi list working

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.
 - o From the Contact form navigate to the "SMS Chat" tab and use the chat window to talk with the lead via text.

