

# What's new in CRM customer service?

Find out more about what's included  
with product updates

Applies to CRM Online Spring '14 and  
CRM 2013 Service Pack 1 (on-prem)

 Microsoft Dynamics CRM

For Service  
Managers



# excellent service easier than ever

With the spring wave of product updates, you can give your service team more ways to make sure every customer gets the best service possible.

This eBook tells you about:

- The new Service Management tile
- Countdown timer on the case screen
- How to create cases automatically from email and social media
- Service level agreements and entitlements



**Note:** If your organization is brand new to Microsoft Dynamics CRM, you get these customer service features automatically. For more information see: [Install product updates](#).

# Service Management tile

We've added a new **Service Management** tile under **Settings** where you will find everything you need to manage service features in one place.

The screenshot shows the Microsoft Dynamics CRM interface with the 'Service Management' tile highlighted in the top navigation bar. The tile content is organized into several sections:

- Service Management** (Section Header)
- Set up customer service for your organization.** (Instructional text)
- Case settings** (Section Header)
  - Queues
  - Routing Rule Sets
  - Subjects
  - Parent and Child case settings
  - Automatic Case Creation Rules
- Service Terms** (Section Header)
  - Service Level Agreements
  - Holiday Schedule
  - Entitlements
  - Customer Service Schedule
- Templates** (Section Header)
  - Entitlement Templates
  - Article Templates
  - Email Templates
  - Contract Templates
- Service Scheduling** (Section Header)
  - Business Closure
  - Services



# measure how your team is doing

Service Level Agreements (SLAs) let you define how you want to measure your team's performance. For example, you can have agents resolve high priority cases in 6 hours, and normal cases within 2 days.

Microsoft Dynamics CRM | SETTINGS | Service Management | Default SLA

+ NEW | DEACTIVATE | EMAIL A LINK | RUN REPORT

## Default SLA

### General

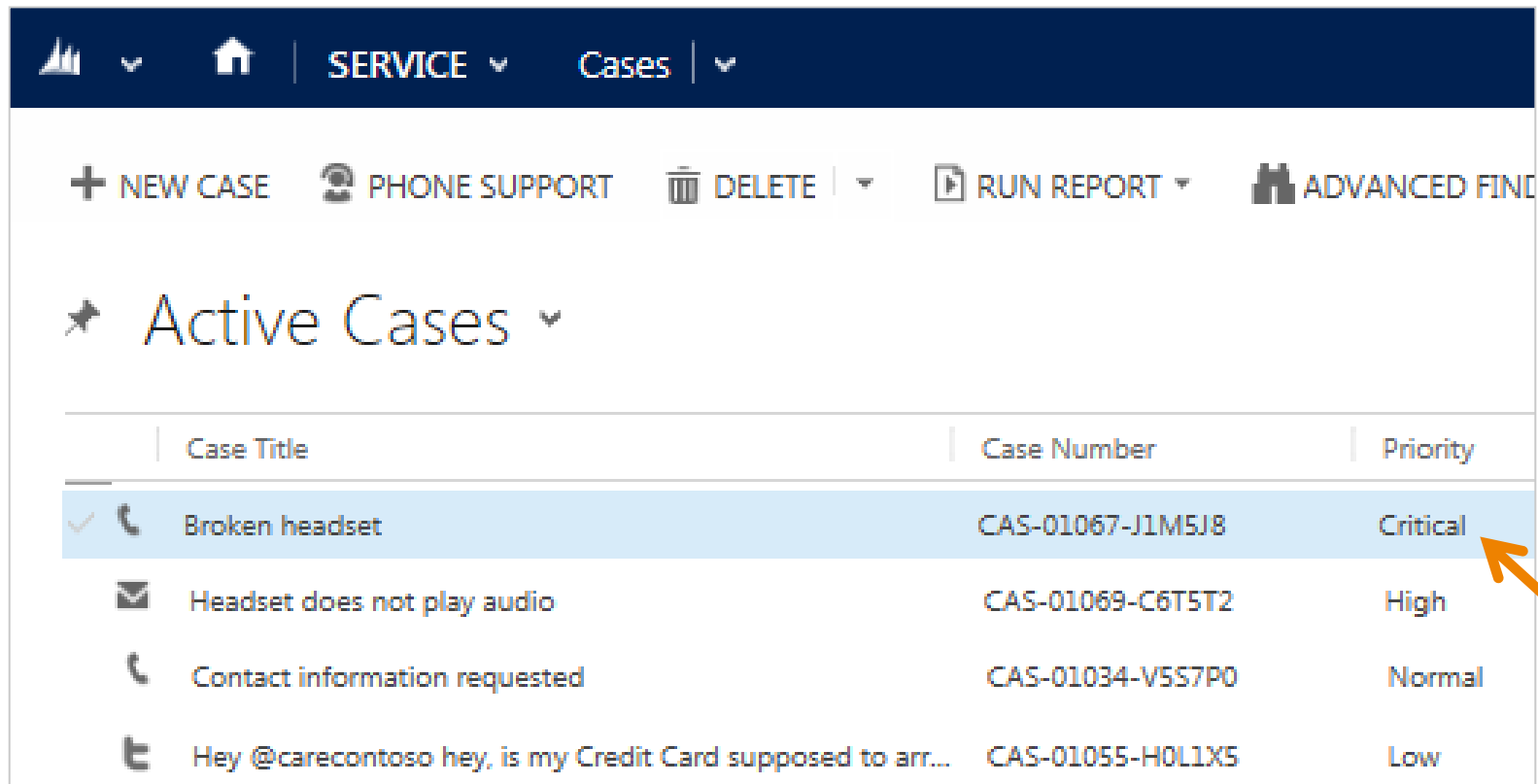
Name \*      Default SLA  
Applicable From \*      Created On  
Business Hours      Standard Service Schedule

#### SLA Details

Name	Warn After	Failure After	Related Case Field
Resolve by KPI: Critical Priority Cases	6 hours	8 hours	resolveby
First Response by KPI: Critical Priority Cases	1 hour	2 hours	responseby
Resolve by KPI: High Priority Cases	10 hours	12 hours	resolveby
First Response by KPI: High Priority Cases	5 hours	6 hours	responseby
Resolve by KPI: Normal Priority Cases	2 days	3 days	resolveby
First Response by KPI: Normal Priority Cases	1 day	2 days	responseby



let agents know which cases to tackle first – either by priority...



The screenshot shows a CRM interface with a dark blue header containing navigation icons and the text 'SERVICE' and 'Cases'. Below the header is a toolbar with buttons for '+ NEW CASE', 'PHONE SUPPORT', 'DELETE', 'RUN REPORT', and 'ADVANCED FIND'. The main content area is titled 'Active Cases' and contains a table with the following data:

	Case Title	Case Number	Priority
✓ 📞	Broken headset	CAS-01067-J1M5J8	Critical
✉	Headset does not play audio	CAS-01069-C6T5T2	High
📞	Contact information requested	CAS-01034-V5S7P0	Normal
🗨	Hey @carecontoso hey, is my Credit Card supposed to arr...	CAS-01055-H0L1X5	Low



# ...or by cases nearing SLA goals

Add a countdown timer (called a *timer control*) to let agents know how much time they have left to resolve a case.

The screenshot shows the Microsoft Dynamics CRM interface for a case titled "Broken headset". The page includes a navigation bar with "Microsoft Dynamics CRM", "SERVICE", "Cases", and "Broken headset". The case details show "Priority: Critical", "Created On: 5/14/2014 3:13 PM", and "Status: In Progress". A progress bar indicates the current stage is "Identify (Active)".

The "Summary" section is divided into "CASE DETAILS", "POSTS", "ACTIVITIES", "NOTES", and "APPLICABLE SLA". The "APPLICABLE SLA" section is highlighted with an orange box and contains the following information:

SLA Type	Start Time	End Time
First Response Due	5/14/2014 5:13 PM	0h 47m 52s
First Response By	5/14/2014 5:13 PM	
Resolve By Due In		20h 12m 8s
Resolve By	5/15/2014 2:13 PM	

The "CUSTOMER DETAILS" section shows the customer is "A. Datum Corporation" with an email address of "someone9@example.com" and a phone number of "555-0158".

You must be a system customizer to add the timer control to the screen that agents see when they work on a case.



# help agents verify the level of support

Make sure agents give the right amount of support to the right customers.

In this example, this is a premium customer who is entitled to 1,000 hours of support.

The screenshot shows the Microsoft Dynamics CRM interface for a case titled "Defective Credit Card". The breadcrumb trail is "Microsoft Dynamics CRM > SERVICE > Cases > Defective Credit Card". The case is in the "Identify (Active)" stage, with "Research" and "Resolve" stages also visible. The "Summary" section is divided into "CASE DETAILS" and "CUSTOMER DETAILS".

**CASE DETAILS**

Customer	Sidney Higa
Contact	--
Case Title	Defective Credit Card
ID	CAS-01063-TSL3M0
Subject	Credit Card
Origin	Email
Entitlement	Premium Entitlement for Sidney Higa
Parent Case	--
Escalated	No
Escalated On	--

**DESCRIPTION**

The Credit card which was shipped to customer was defective and CVV code was not visible.

**CUSTOMER DETAILS**

Sidney Higa

Company	Blue Yonder Airlines
Email	someone_e@example.com
Mobile	--
Business	555-0104

**ENTITLEMENT**

Entitlement Name ↑	Remaining Terms	Status
Premium Entitlement f...	1,000.00	Active



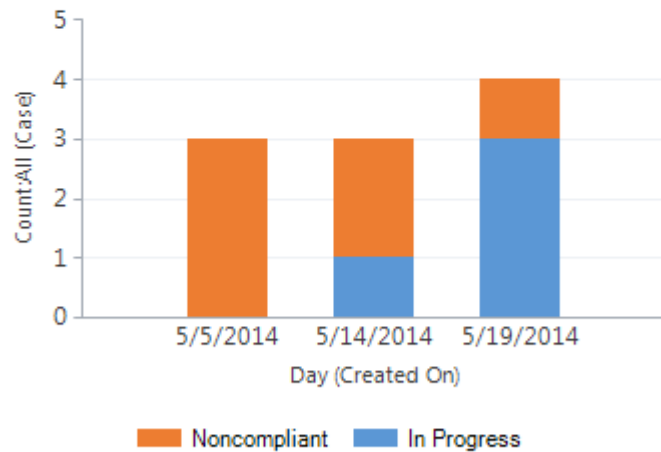
# track SLAs during scheduled hours

Get an accurate picture of how your team is doing by setting up your service schedule. This way, your team's performance is only measured during your business hours.

## Customer Service Performance ▾

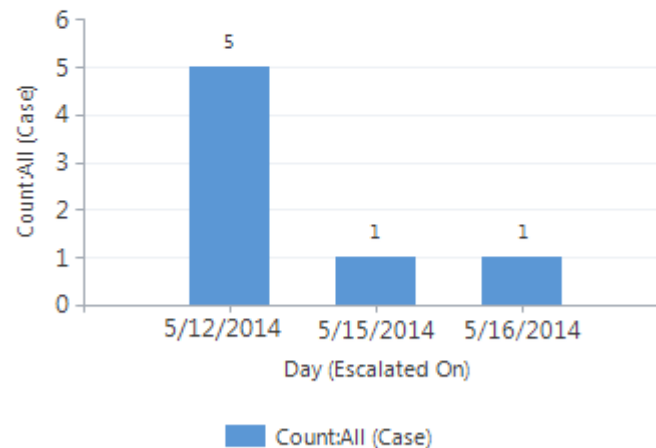
Cases by SLA Status By Day

Active Cases



Escalated Cases by day

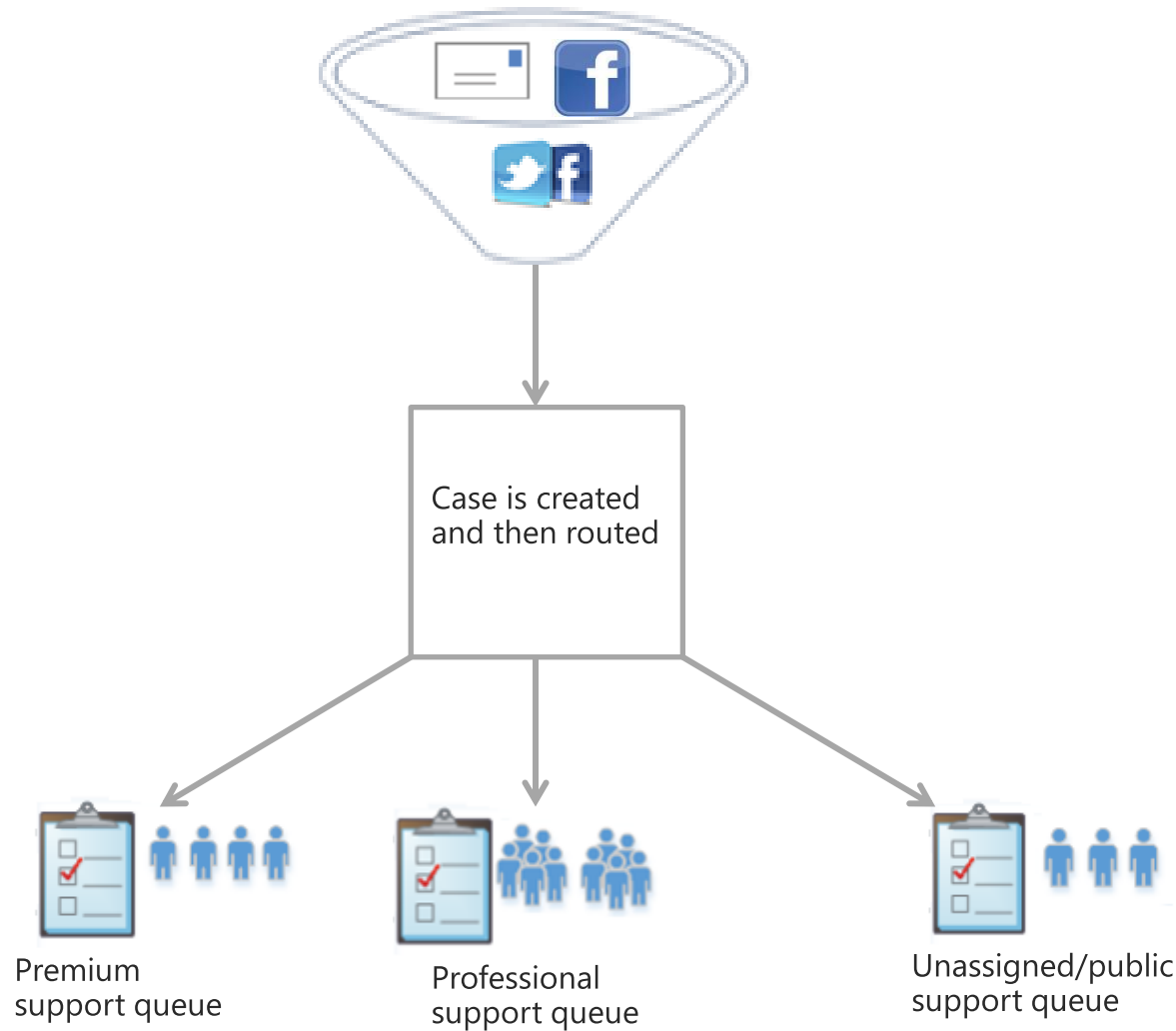
All Cases





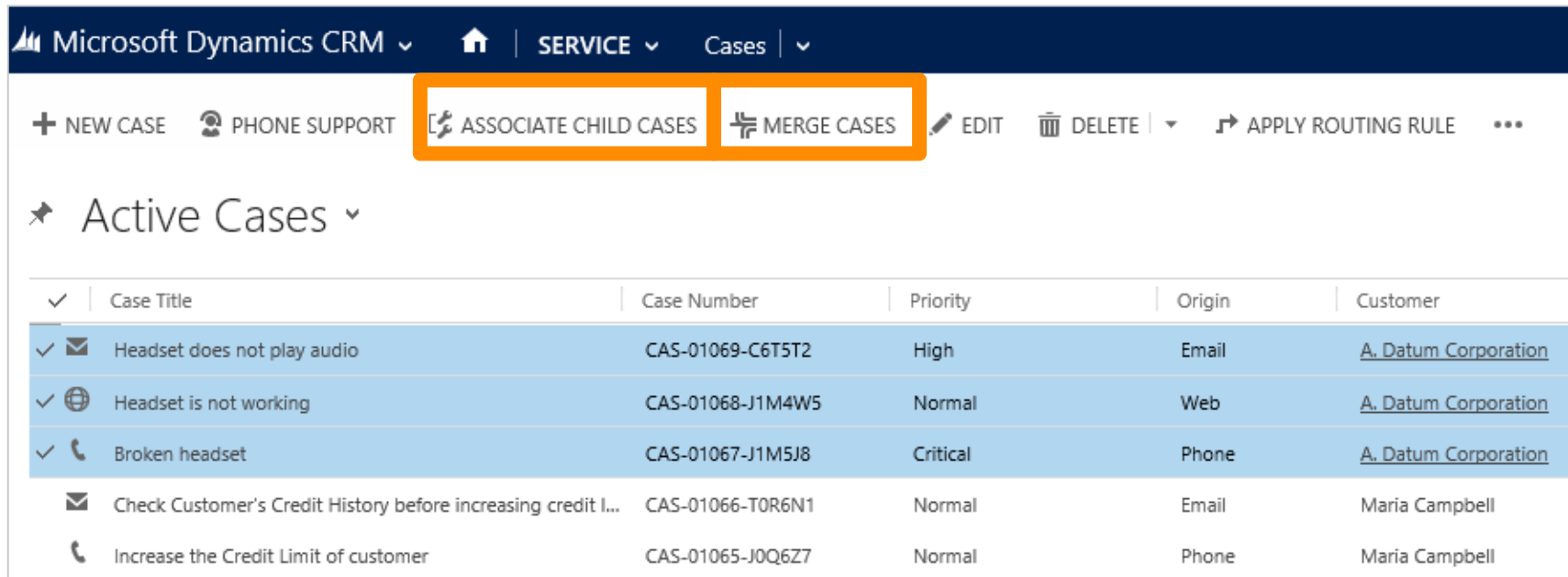
# monitor channels for new cases automatically

Set up the system to create cases automatically from posts on Facebook, Twitter, and from email. The system can then route the cases to the right queue so your agents can respond quickly.



# avoid duplicating support efforts

Agents can merge several related cases into one case, or group related cases under one primary parent case.



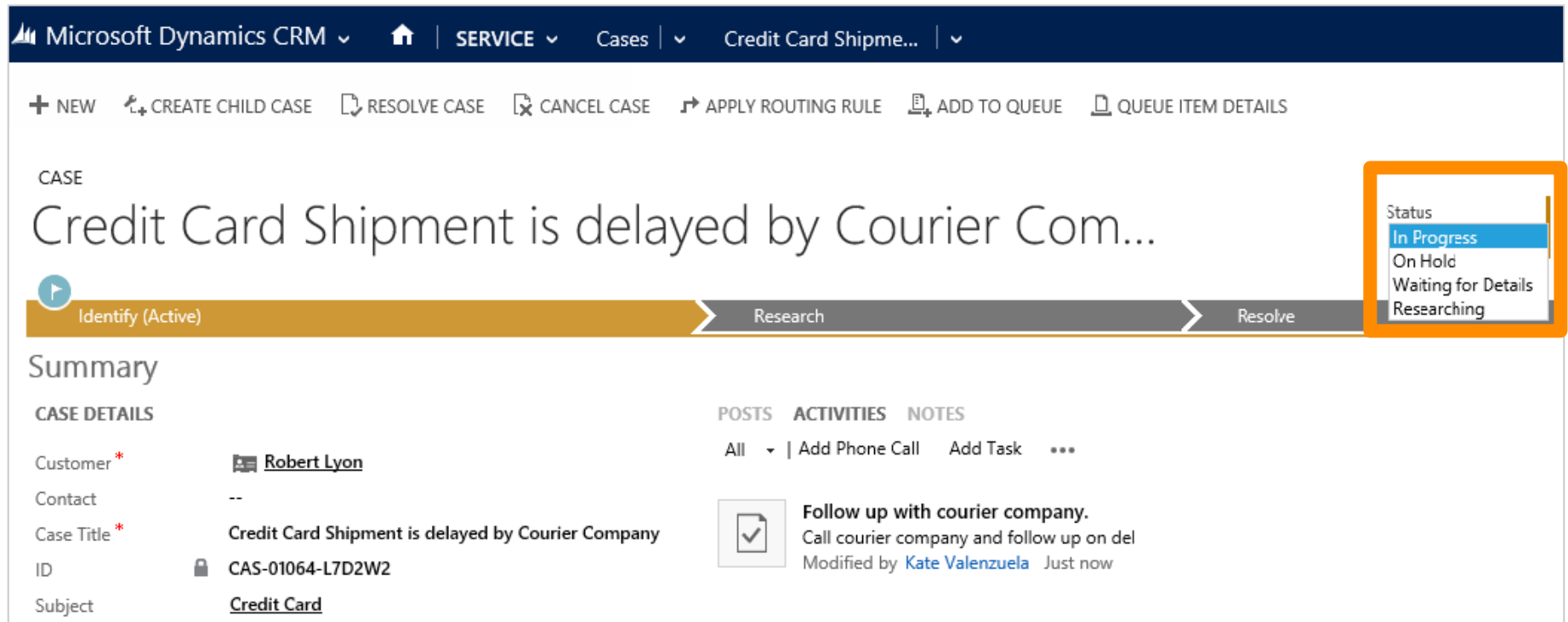
The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes 'Microsoft Dynamics CRM', 'SERVICE', and 'Cases'. Below the navigation bar, there are several action buttons: 'NEW CASE', 'PHONE SUPPORT', 'ASSOCIATE CHILD CASES', 'MERGE CASES', 'EDIT', 'DELETE', 'APPLY ROUTING RULE', and a menu icon. The 'ASSOCIATE CHILD CASES' and 'MERGE CASES' buttons are highlighted with an orange border. Below the buttons, there is a section titled 'Active Cases' with a dropdown arrow. Underneath, there is a table with columns for 'Case Title', 'Case Number', 'Priority', 'Origin', and 'Customer'. The table contains five rows of case data.

✓	Case Title	Case Number	Priority	Origin	Customer
✓	Headset does not play audio	CAS-01069-C6T5T2	High	Email	<a href="#">A. Datum Corporation</a>
✓	Headset is not working	CAS-01068-J1M4W5	Normal	Web	<a href="#">A. Datum Corporation</a>
✓	Broken headset	CAS-01067-J1M5J8	Critical	Phone	<a href="#">A. Datum Corporation</a>
✓	Check Customer's Credit History before increasing credit l...	CAS-01066-T0R6N1	Normal	Email	Maria Campbell
✓	Increase the Credit Limit of customer	CAS-01065-J0Q6Z7	Normal	Phone	Maria Campbell



# help agents choose the right case status

Give agents a short precise list of case statuses to choose from to help eliminate guesswork about what they need to do next.



Microsoft Dynamics CRM | SERVICE | Cases | Credit Card Shipme...

+ NEW | CREATE CHILD CASE | RESOLVE CASE | CANCEL CASE | APPLY ROUTING RULE | ADD TO QUEUE | QUEUE ITEM DETAILS



CASE

## Credit Card Shipment is delayed by Courier Com...

Identify (Active) | Research | Resolve


### Summary

**CASE DETAILS**

Customer*	 <b>Robert Lyon</b>
Contact	--
Case Title*	<b>Credit Card Shipment is delayed by Courier Company</b>
ID	 <b>CAS-01064-L7D2W2</b>
Subject	<b>Credit Card</b>

**POSTS** | **ACTIVITIES** | **NOTES**

All | Add Phone Call | Add Task | ...

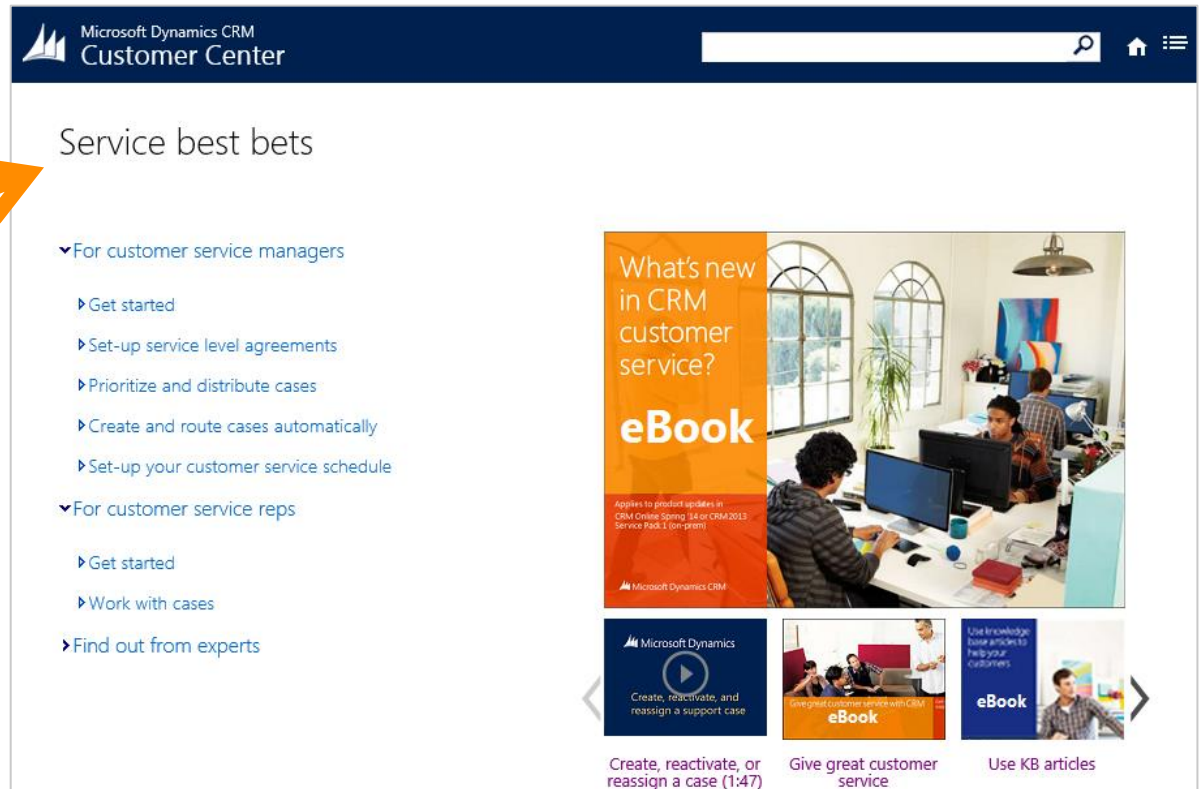
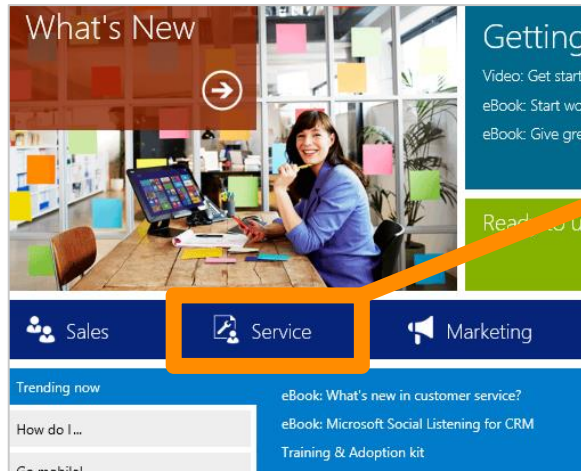
 **Follow up with courier company.**  
Call courier company and follow up on del  
Modified by [Kate Valenzuela](#) Just now

You must be a system customizer to define case status transitions rules.



# That's it! Want more info?

To find out more about these great new features and other service topics, you can always visit [www.CRMCustomerCenter.com](http://www.CRMCustomerCenter.com) and click **Service**.



Thanks for reading!

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[Customer Center](#)

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