

# Give great customer service with CRM

Get started with common support tasks in Microsoft Dynamics CRM



# keep track of your customer requests

Keep track of your customer requests and issues by creating support cases in Microsoft Dynamics CRM.

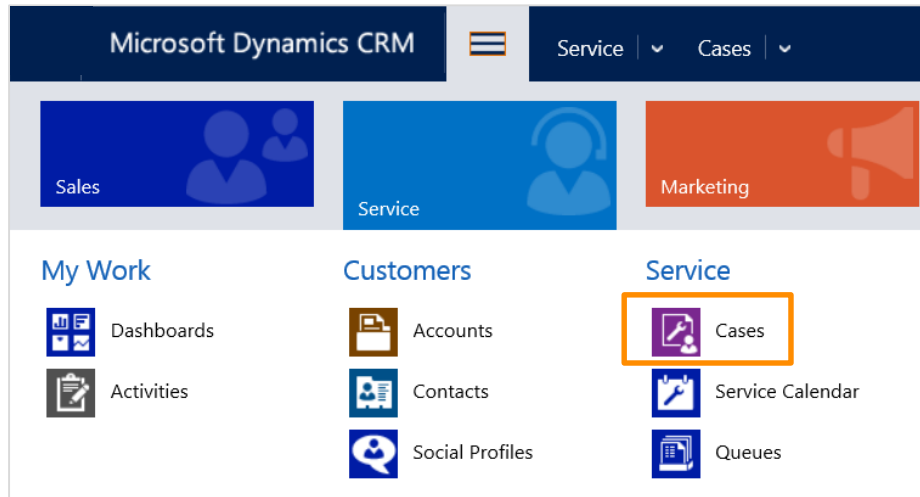
When a customer contacts support with a question or problem, you can quickly check to see if there is an existing case or open a new case and start tracking the issue.



# get started

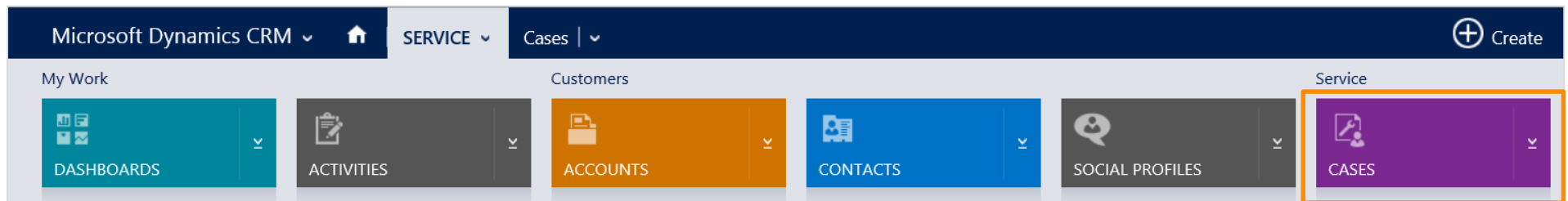
If your screen looks like this (latest version):

On the nav bar, choose **Service** > **Cases**. Choose **New Case**.



If your screen looks like this (older versions):

Choose **Microsoft Dynamics CRM** > **Service** > **Cases**. Choose **New Case**.



# check for duplicates cases

Before you create a new customer record, check to see if it is already in the system.

SAVE & CLOSE + NEW SAVE EDIT PROCESS FORM EDITOR

CASE  
New Case

Priority Normal Created On -- Status In Progress

Identify (Active) Research Resolve

Summary

CASE DETAILS

Customer \* Contoso

Contact Contoso Pharmaceuticals (sample) someone7@example.com 555-0156

Case Title \* Robert Lyon (sample) someone\_g@example.com 555-0106

ID

Subject Look Up More Records

Origin

Entitlement 2 results

Satisfaction --

Product --

DESCRIPTION

POSTS ACTIVITIES NOTES

All | Add Phone Call Add Task ...

We didn't find any activity records.

1. Choose the **Customer** lookup button.
2. If a record for the customer does not exist, choose **New** to create a new contact record.



# ...continued

To help resolve a case, each stage and step is clearly outlined in the process bar at the top of the screen. You'll see the process bar when you move from one stage to the next when you're working on a case.

The screenshot displays a case management interface for a case titled "Maintenance information (sample)". At the top, there is a process bar with three stages: "Identify" (checked), "Research (Active)", and "Resolve". The "Identify" stage is highlighted with an orange circle and a "1" next to it. The "Research (Active)" stage is also highlighted with an orange circle and a "2" next to it. The "Identify" stage is further highlighted with a bracket and a "1" next to it. The "Research (Active)" stage is further highlighted with a bracket and a "2" next to it. The interface includes a summary section with case details, a posts/activities/notes section, and customer details.

**Case Information:**

- Case ID: CAS-01011-Y7Y3R4
- Subject: Maintenance
- Priority: Normal
- Created On: 2/23/2014 7:00 AM
- Status: In Progress

**Customer Details:**

- Customer: Nancy Anderson (sample)
- Company: Adventure Works (sample)
- Email: someone\_c@example.com
- Business Phone: 555-0102

**Activity Log:**

- Nancy Anderson (sample)**: Scheduled an appointment with the customer. Captured preliminary customer and produ... Completed by First name Last name 2/28/2014 4:48 PM

1. Choose a field to enter data as you handle the details.

2. Choose the process bar to see the steps in a stage.



# ...continued

When you select an existing customer, the customer details will show the contact details, along with recent cases and activities for the customer.

SAVE & CLOSE + NEW SAVE EDIT PROCESS FORM EDITOR

CASE

## New Case

1 Identify (Active) Research

Find Customer\*  
Find Contact  
Find Case

Contoso Pharmaco...  
click to enter

2

CHOOSE AN EXISTING CASE

- Maintenance time information required (...  
CAS-01013-H2W... Contoso Pharmac...
- Product related question (sample)  
CAS-01023-J9P2Z9 Robert Lyon (sam...

Look Up More Records

2 results + New

Summary

CASE DETAILS

Customer\*  
Contact  
Case Title\*

POSTS ACTIVITIES NOTES

All | Add Phone Call Add Task ...

We didn't find any activity records.

1. Choose the **Identify** stage on the process bar.

2. Choose the **Look up** button and select an existing case.

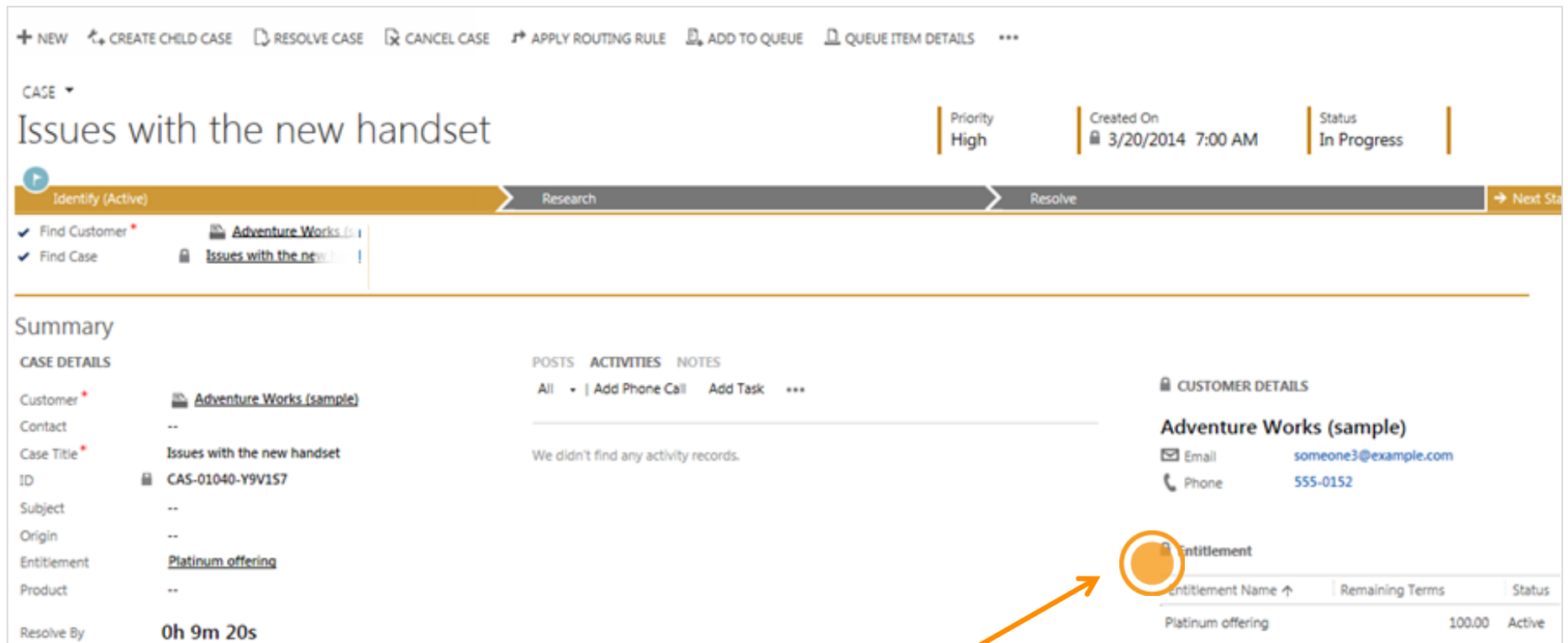
Or, if it's a new case, choose **New**.



# provide the right level of support

Use entitlements to see what kind of support you should provide the customer.

If the entitlement is not applied automatically, choose the **Entitlements Look up** button and then select an entitlement.



The screenshot displays a CRM case record for "Issues with the new handset". The case is in the "Identify (Active)" stage. The summary section shows the customer "Adventure Works (sample)" with the case title "Issues with the new handset" and ID "CAS-01040-Y9V157". The entitlement is "Platinum offering". The "Entitlements" table shows one active entitlement: "Platinum offering" with 100.00 remaining terms.

Entitlement Name	Remaining Terms	Status
Platinum offering	100.00	Active

This is where you'll see a customer's entitlements for support.



# track your communication history

NEW CREATE CHILD CASE CANCEL CASE APPLY ROUTING RULE ADD TO QUEUE QUEUE ITEM DETAILS ASSIGN ...

CASE  
Maintenance information (sample) Priority Normal Created On 2/23/2014 7:00 AM Status In Progress

Identify Research (Active) Resolve

Summary

CASE DETAILS

Customer Nancy Anderson (sample)  
Contact --  
Case Title Maintenance information (sample)  
ID CAS-01011-Y7Y3R4  
Subject Maintenance  
Origin Phone  
Entitlement --  
Satisfaction --  
Product --

DESCRIPTION

POSTS ACTIVITIES NOTES  
All Add Phone Call Add Task ...

Call With Nancy Anderson (sample)  
Direction Outgoing

Left voice mail OK Cancel

CUSTOMER DETAILS  
Nancy Anderson (sample)  
Company Adventure Works (sample)  
Email someone\_c@example.com  
Mobile --  
Business 555-0902

ENTITLEMENT  
Entitlement Name ↑ Remaining Terms Status  
No Entitlement records found.

Choose **Activities** > **Add Phone Call** or choose **NOTES** to add your case activities and notes.





# look up solutions from other cases

Look at similar cases to help you resolve the case you're working on.

**Tip:** By default, the search will look for cases with a similar subject.

1. Choose **Case Relationships**.

2. Choose (+) **Add Connection record**.

3. From the **Find Similar Cases** dialog box, use the search to find similar cases.

4. Once you find the case that has the information you need to resolve the case you're working on, choose the case, and then choose **Found a Solution**.



# reassign a case to someone else

If you don't have enough information to resolve a case, or if you think another member in your team has expertise on the subject, you can reassign the case to them.

**Case Management Interface**

**Navigation:** + NEW, CREATE CHILD CASE, CANCEL CASE, APPLY ROUTING RULE, ADD TO QUEUE, QUEUE ITEM DETAILS, **ASSIGN**, ...

**Case Information:** CASE: Maintenance information (s) | Priority: Low | Created On: 2/23/2014 7:00 AM | Status: In Progress

**Workflow:** Identify (checked) → Research (Active) → Resolve

**Summary**

**CASE DETAILS**

- Customer: \* Nancy Anderson (sample)
- Contact: --
- Case Title: \* Maintenance information (sample)
- ID: CAS-01011-Y7Y3R4
- Subject: Maintenance
- Origin: Phone
- Entitlement: --
- Satisfaction: --
- Product: --

**DESCRIPTION**

--

**CUSTOMER DETAILS**

**Nancy Anderson (sample)**

- Company: Adventure Works (sample)
- Email: someone\_c@example.com
- Mobile: --
- Business: 555-0102

**ENTITLEMENT**

Entitlement Name ↑	Remaining Terms	Status
No Entitlement records found.		

**Assign to Team or User Dialog**

You have selected 1 item. To whom would you like to assign it?

- Assign to me**  
Assign the selected Case to yourself.
- Assign to another user or team**  
Assign the selected item(s) to the following user or team:

**Buttons:** Assign, Cancel



# put a case back in to the queue

If you don't know who to assign the case to, you can move the case to a queue and have someone else pick it up.

The screenshot displays a case management interface for a case titled "Maintenance information (sample)". The top navigation bar includes buttons for "NEW", "CREATE CHILD CASE", "CANCEL CASE", "APPLY ROUTING RULE", "ADD TO QUEUE", "QUEUE ITEM DETAILS", "ASSIGN", and a menu icon. The case details show a priority of "Low", created on "2/23/2014 7:00 AM", and a status of "In Progress". The case is currently in the "Research (Active)" phase, with "Identify" and "Resolve" phases also visible. A modal dialog titled "Add to Queue" is open, prompting the user to "Select the queue that you want to add the selected record to." The modal includes a "Queue" dropdown menu and "Add" and "Cancel" buttons. The background interface shows case details for "Nancy Anderson (sample)" and "Adventure Works (sample)", including contact information and entitlement details.

Summary

CASE DETAILS

Customer \* [Nancy Anderson \(sample\)](#)

Contact --

Case Title \* **Maintenance information (sample)**

ID **CAS-01011-Y7Y3R4**

Subject **Maintenance**

Origin **Phone**

Entitlement --

Satisfaction --

Product --

DESCRIPTION

--

POSTS ACTIVITIES NOTES

**Add to Queue**

Select the queue that you want to add the selected record to.

Queue

Queue

Add Cancel

**CUSTOMER DETAILS**

**Nancy Anderson (sample)**

Company **Adventure Works (sample)**

Email [someone\\_c@example.com](mailto:someone_c@example.com)

Mobile --

Business **555-0102**

**ENTITLEMENT**


Entitlement Name ↑ Remaining Terms Status

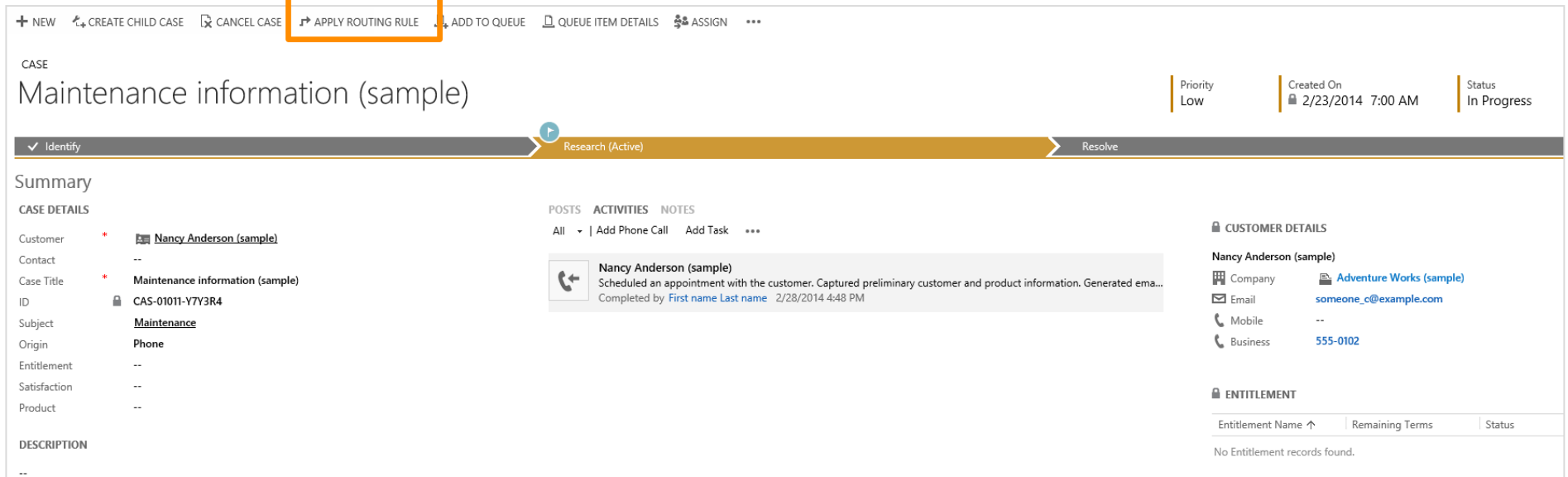
No Entitlement records found.



# or, automatically route a case to a queue

You can also route the case to another queue based on the active routing rule your service manager has turned on.

 APPLY ROUTING RULE



NEW CREATE CHILD CASE CANCEL CASE **APPLY ROUTING RULE** ADD TO QUEUE QUEUE ITEM DETAILS ASSIGN ...

CASE  
Maintenance information (sample) Priority Low Created On 2/23/2014 7:00 AM Status In Progress

Identify **Research (Active)** Resolve

Summary

**CASE DETAILS**

Customer	* Nancy Anderson (sample)
Contact	--
Case Title	* Maintenance information (sample)
ID	CAS-01011-Y7Y3R4
Subject	Maintenance
Origin	Phone
Entitlement	--
Satisfaction	--
Product	--

**DESCRIPTION**

--

**POSTS ACTIVITIES NOTES**

All | Add Phone Call Add Task ...

**Nancy Anderson (sample)**  
Scheduled an appointment with the customer. Captured preliminary customer and product information. Generated ema...  
Completed by First name Last name 2/28/2014 4:48 PM

**CUSTOMER DETAILS**

**Nancy Anderson (sample)**

Company	Adventure Works (sample)
Email	someone_c@example.com
Mobile	--
Business	555-0102

**ENTITLEMENT**

Entitlement Name ↑	Remaining Terms	Status
No Entitlement records found.		



**Applies to:** This feature is only available in organizations that have applied product updates for CRM Online Spring '14 or CRM 2013 Service Pack 1

# close a case

1

2

3

Select and fill in the appropriate information.

Resolution Type \* Problem Solved

Resolution \* issue resolved

Total Time 0 minutes

Billable Time \* 5 minutes

Remarks  
Power has been restored.

Resolve Cancel

CUSTOMER DETAILS  
David Campbell  
Company Speedy Sales Store  
Email david@speedysalesstore.com  
Mobile +3408581275  
Business +3408581275

ENTITLEMENT  
Entitlement Name Remaining Terms Status  
No Entitlement records found.

RECENT CASES  
Status Case Title  
Active Broken headset  
Active Want to upgra...

Summary  
CASE DETAILS  
Customer David Campbell  
Contact --  
Case Title Broken headset  
ID CAS-01000-C7R9Z9  
Service Level --  
Subject --  
Origin --  
Entitlement --  
Predicted Satisfact --  
WebSite Duration --  
Case Category --  
Upsell Referral No  
Product --  
DESCRIPTION --  
APPLICABLE SLA  
First Response By --  
Active

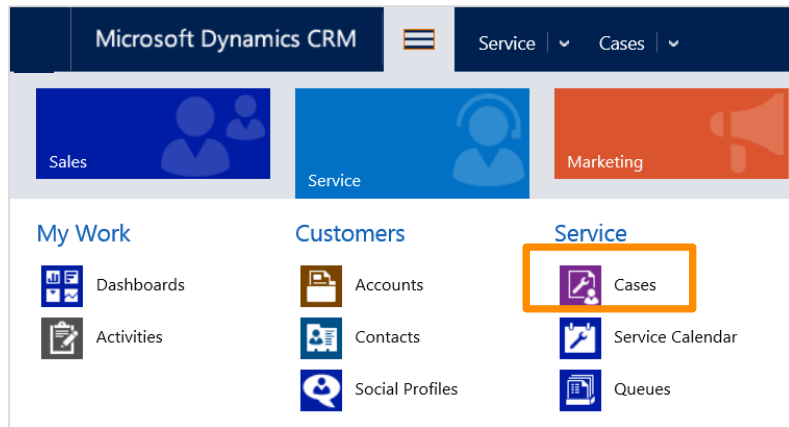


# merge similar cases

Eliminate redundancies between similar cases by merging them into one case. When a customer opens multiple cases about the same issue (through different support channels) or when multiple customers from the same account call in about the same issue, you can merge those cases into one case.

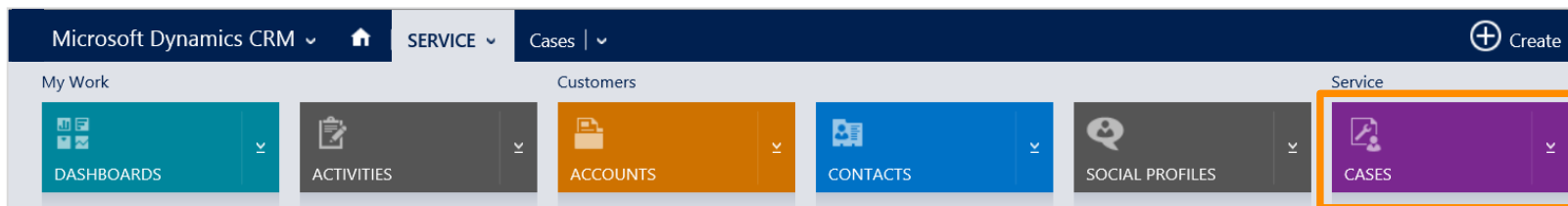
If your screen looks like this (latest version):

On the nav bar, choose **Service** > **Cases**. Choose **New Case**.



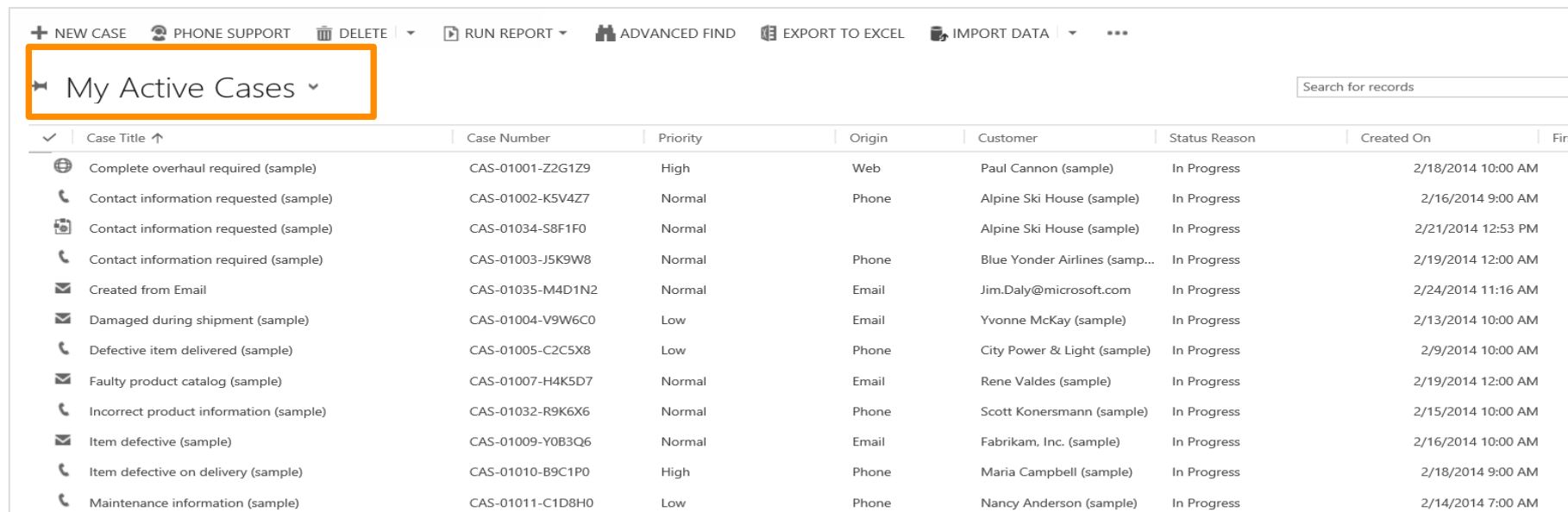
If your screen looks like this (older versions):

Choose **Microsoft Dynamics CRM** > **Service** > **Cases**. Choose **New Case**.



# ....continued

On the next screen, you will see a list of your active cases.



NEW CASE PHONE SUPPORT DELETE RUN REPORT ADVANCED FIND EXPORT TO EXCEL IMPORT DATA

My Active Cases

Case Title ↑	Case Number	Priority	Origin	Customer	Status Reason	Created On	Fir
Complete overhaul required (sample)	CAS-01001-Z2G1Z9	High	Web	Paul Cannon (sample)	In Progress	2/18/2014 10:00 AM	
Contact information requested (sample)	CAS-01002-K5V4Z7	Normal	Phone	Alpine Ski House (sample)	In Progress	2/16/2014 9:00 AM	
Contact information requested (sample)	CAS-01034-S8F1F0	Normal		Alpine Ski House (sample)	In Progress	2/21/2014 12:53 PM	
Contact information required (sample)	CAS-01003-J5K9W8	Normal	Phone	Blue Yonder Airlines (samp...	In Progress	2/19/2014 12:00 AM	
Created from Email	CAS-01035-M4D1N2	Normal	Email	Jim.Daly@microsoft.com	In Progress	2/24/2014 11:16 AM	
Damaged during shipment (sample)	CAS-01004-V9W6C0	Low	Email	Yvonne McKay (sample)	In Progress	2/13/2014 10:00 AM	
Defective item delivered (sample)	CAS-01005-C2C5X8	Low	Phone	City Power & Light (sample)	In Progress	2/9/2014 10:00 AM	
Faulty product catalog (sample)	CAS-01007-H4K5D7	Normal	Email	Rene Valdes (sample)	In Progress	2/19/2014 12:00 AM	
Incorrect product information (sample)	CAS-01032-R9K6X6	Normal	Phone	Scott Konersmann (sample)	In Progress	2/15/2014 10:00 AM	
Item defective (sample)	CAS-01009-Y0B3Q6	Normal	Email	Fabrikam, Inc. (sample)	In Progress	2/16/2014 10:00 AM	
Item defective on delivery (sample)	CAS-01010-B9C1P0	High	Phone	Maria Campbell (sample)	In Progress	2/18/2014 9:00 AM	
Maintenance information (sample)	CAS-01011-C1D8H0	Low	Phone	Nancy Anderson (sample)	In Progress	2/14/2014 7:00 AM	



# ...continued

When a case is merged, the state of the case is changed to cancelled and the status is changed to merged. That's because it's merged into another case and all of the open case activities, emails, and attachments are now associated with the case it was merged into.

1. Select the cases that you want to merge.

2. Choose **Merge Cases**.

3. Select the case that the other cases will be merged into.

4. Choose **Merge**.

2

Case Title	Case Number	Priority	Origin	Customer	Status Reason
Average order shipment time (sample)	CAS-01000-V1Y5X2	Normal	Web	Litware, Inc. (sample)	In Progress
Complete overhaul required (sample)	CAS-01001-R0L8G0	High	Web	Paul Cannon (sample)	In Progress
Contact information requested (sample)	CAS-01002-G6L8N4	Normal	Phone	Alpine Ski House (sample)	In Progress
Contact information required (sample)					
Damaged during shipment (sample)					
Defective item delivered (sample)					

3

Case Title	Customer	Priority	Created On
Defective item delivered (sample)	City Power & Light (sample)	Low	2/18/2014 10:00 AM
Damaged during shipment...	Yvonne McKay (sample)	Low	2/22/2014 10:00 AM

4

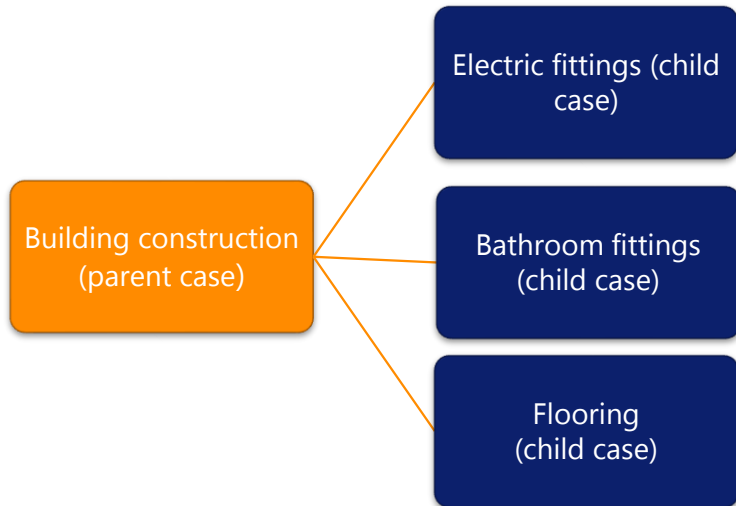




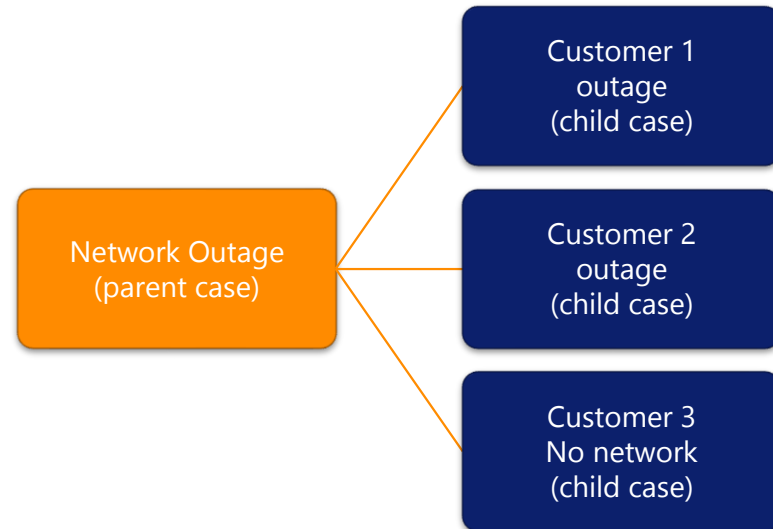
# track issues efficiently

When there is a case where work needs to be done by multiple teams or when one issue effects multiple customers, now a customer service rep can open a primary case, called the *parent* case, and then create a secondary case, called the *child* case.

Here is one issue from the same customer that needs work done on it by other teams.



Here the same issue is affecting multiple customers from the same organization.



# add a child case

Create a new child case or link an existing child case from the case form.

The screenshot shows a CRM case form for 'Maintenance information (sample)'. The 'Research (Active)' step is highlighted. The 'CREATE CHILD CASE' button is circled in orange and labeled with a '1'. Below the main case details, there are sections for 'APPLICABLE SLA', 'Case Relationships', 'Merged Cases', and 'CHILD CASES'. The 'CHILD CASES' section is expanded, showing a list of child cases with columns for Status, Case Title, and Owner. A '2' is placed next to the list, and a '3' is placed next to the '+ New' button at the bottom right of the list, which is also circled in orange. The list includes cases like 'Complete overhaul required (sample)', 'Contact information requested (sample)', etc.

1. Choose **Create Child Cases**.

2. Search for an existing case and add it as a case child. Or, choose **New** to create a new child case.

**IMPORTANT :** The child case option isn't available for child cases of other cases. However, if child cases are deleted from other parent cases, then the child case option is available.

**Applies to:** This feature is only available in organizations that have applied product updates for CRM Online Spring '14 or CRM 2013 Service Pack 1



# ...continued

You can also associate an existing case as a child case from your active list of cases.

The screenshot shows the CRM interface with a list of active cases and a dialog box for setting parent-child relationships. The 'ASSOCIATE CHILD CASES' button is highlighted with a circled '2'. The 'Set Parent Child Relationship' dialog box is open, showing a list of cases with columns for Case Title, Customer, Priority, and Created On. The first row is selected, and the 'Set' button at the bottom right is highlighted with a circled '4'. A large arrow icon is in the bottom right corner.

Case Title	Case Number
Average order shipment time (sample)	CAS-01000-V1Y5X2
Complete overhaul required (sample)	CAS-01001-R0L8G0
Contact information requested (sample)	CAS-01002-G6L8N0
Contact information required (sample)	CAS-01003-W2L7V0

Case Title	Customer	Priority	Created On
Contact information reque...	Alpine Ski House (sample)	Normal	2/25/2014 9:00 AM
Contact information requir...	Blue Yonder Airlines (sample)	Normal	2/28/2014 12:00 AM
Complete overhaul require...	Paul Cannon (sample)	High	2/27/2014 10:00 AM

1. Select the cases that you want associate.
2. Choose **Associate Child Cases**.
3. Select a parent case for the child cases.
4. Choose **Set**.

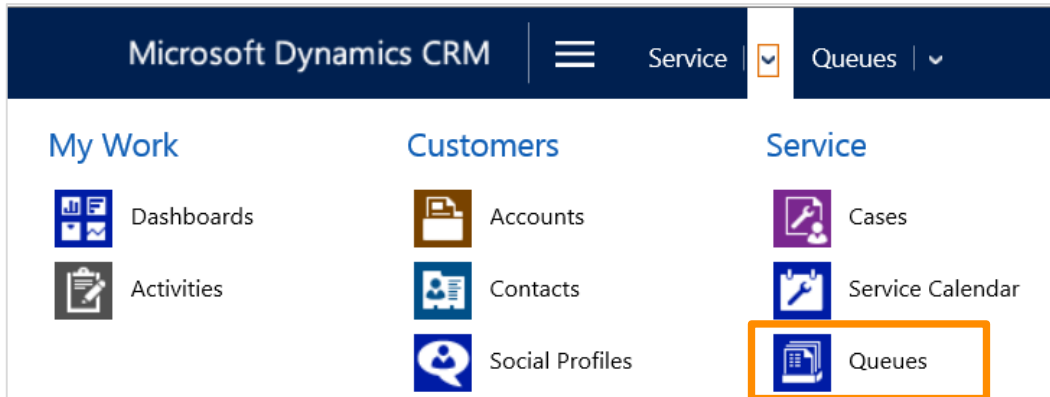
**Applies to:** This feature is only available in organizations that have applied product updates for CRM Online Spring '14 or CRM 2013 Service Pack 1

# look for open cases that need to be worked on

Use queues to quickly see cases assigned to you or cases that are available to work on.

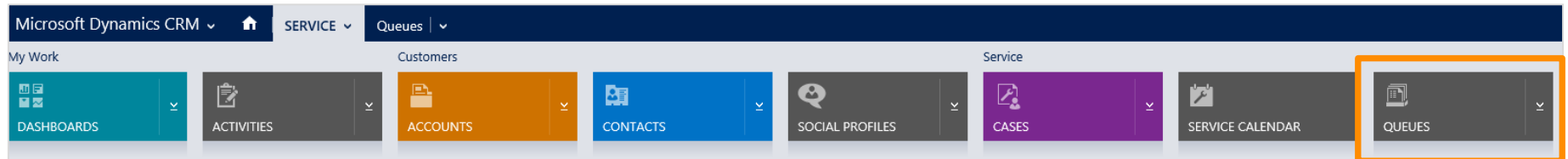
If your screen looks like this (latest version):

On the nav bar, choose **Service** > **Queues**. Choose **New Case**.



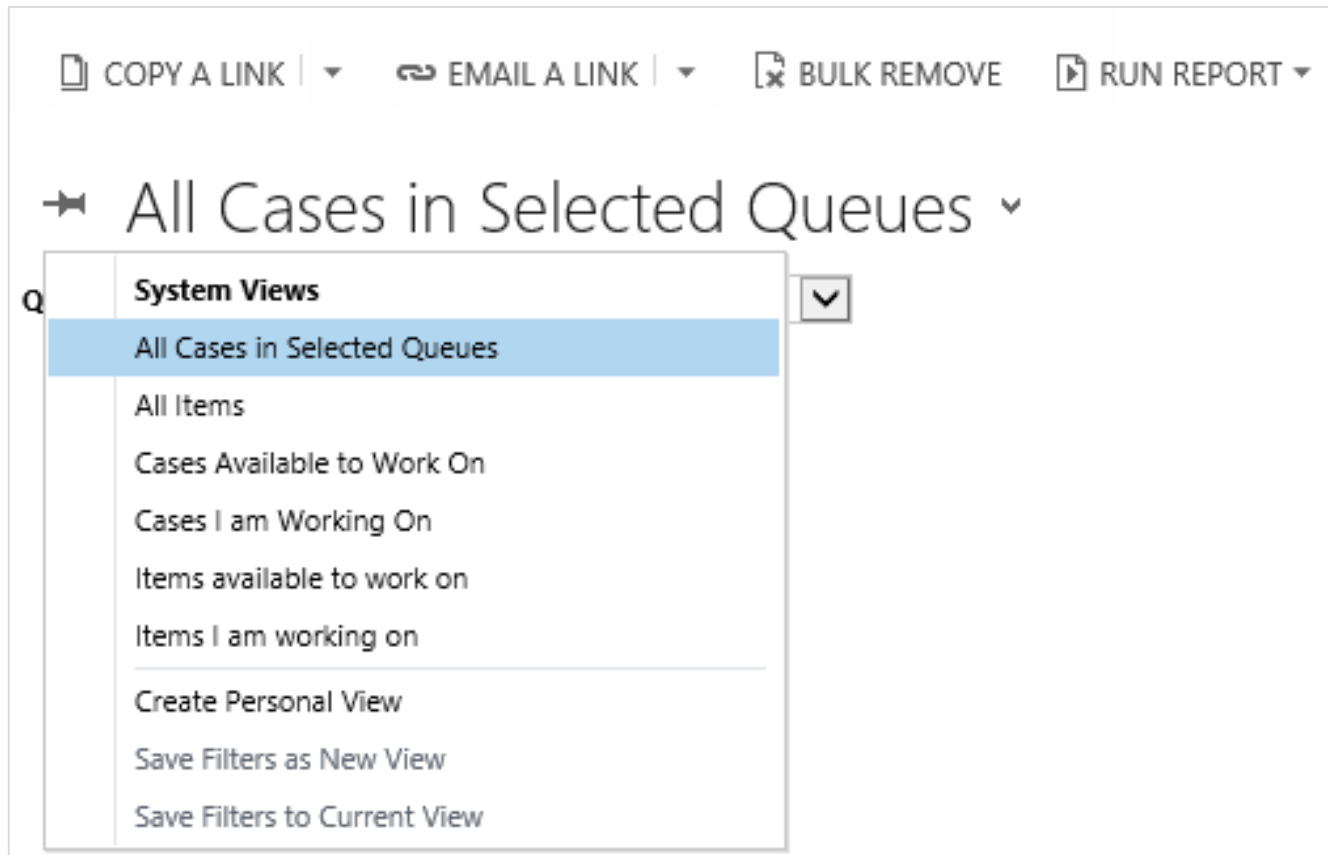
If your screen looks like this (older versions):

Choose **Microsoft Dynamics CRM** > **Service** > **Queues**.



# ...continued

Select a view.



The screenshot shows a software interface with a toolbar at the top containing four buttons: 'COPY A LINK', 'EMAIL A LINK', 'BULK REMOVE', and 'RUN REPORT'. Below the toolbar, the text 'All Cases in Selected Queues' is displayed with a dropdown arrow. A dropdown menu is open, showing a list of views under the heading 'System Views'. The first item, 'All Cases in Selected Queues', is highlighted in blue. Other items in the list include 'All Items', 'Cases Available to Work On', 'Cases I am Working On', 'Items available to work on', and 'Items I am working on'. At the bottom of the menu are three options: 'Create Personal View', 'Save Filters as New View', and 'Save Filters to Current View'. A small 'Q' icon is visible to the left of the dropdown menu.

COPY A LINK | EMAIL A LINK | BULK REMOVE | RUN REPORT

→ All Cases in Selected Queues

Q System Views

- All Cases in Selected Queues
- All Items
- Cases Available to Work On
- Cases I am Working On
- Items available to work on
- Items I am working on

Create Personal View

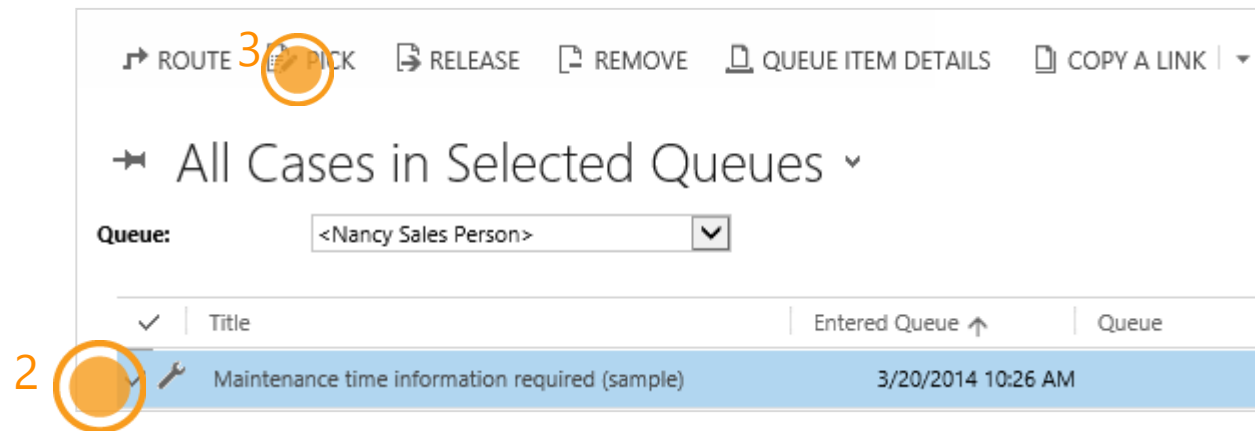
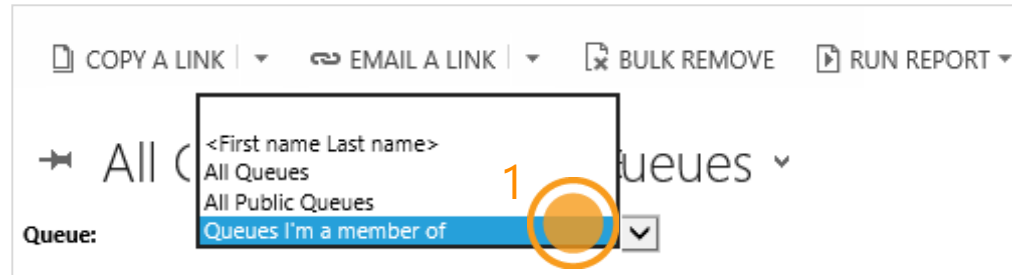
Save Filters as New View

Save Filters to Current View



# ...continued

1. Select a queue.
2. Select the case or item that you want to work on.
3. On the command bar, choose **Pick**.



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[Help & Training Site](#)

Version 7.1





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