Give great customer service with CRM

Get started with common support tasks in Microsoft Dynamics CRM

Microsoft

keep track of your customer requests

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

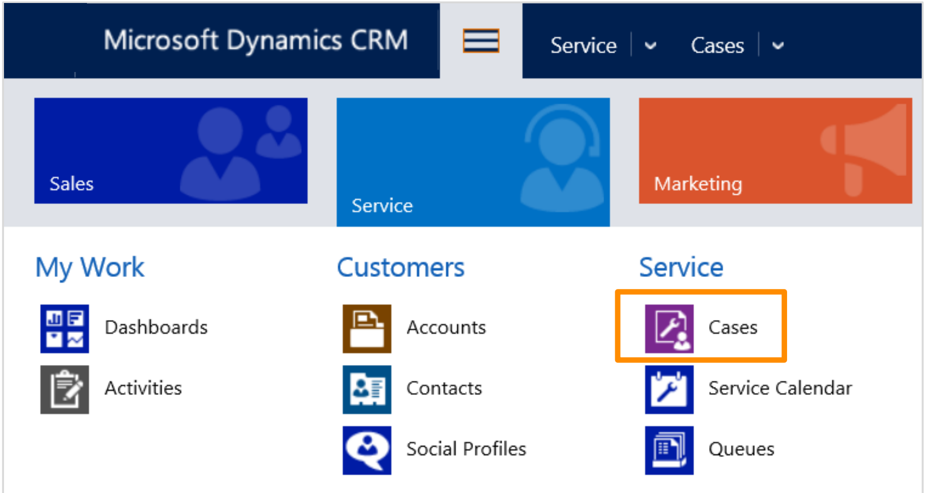
When a customer contacts support with a question or problem, you can quickly check to see if there is an existing case or open a new case and start tracking the issue.

Applies to: CRM Online Spring '14 or CRM 2013 Service Pack 1 or later (on-premises)

get started

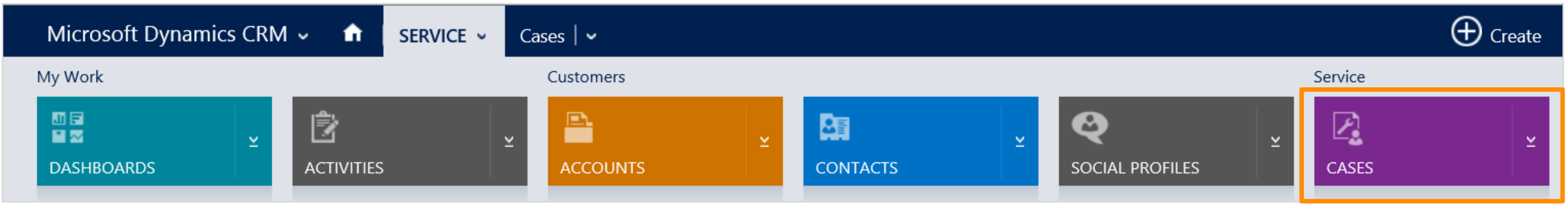
If your screen looks like this (latest version):

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



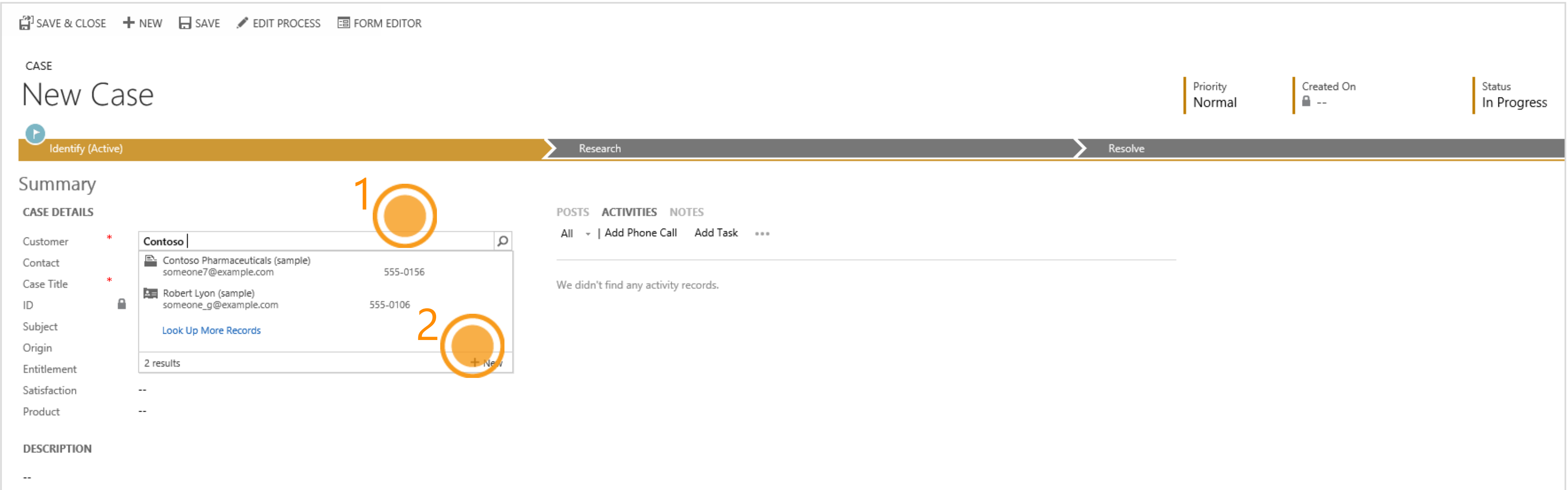
If your screen looks like this (older versions):

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.



1. Choose the **Customer** lookup button.

2. If a record for the customer does not exist, choose **New** to create a new contact record.

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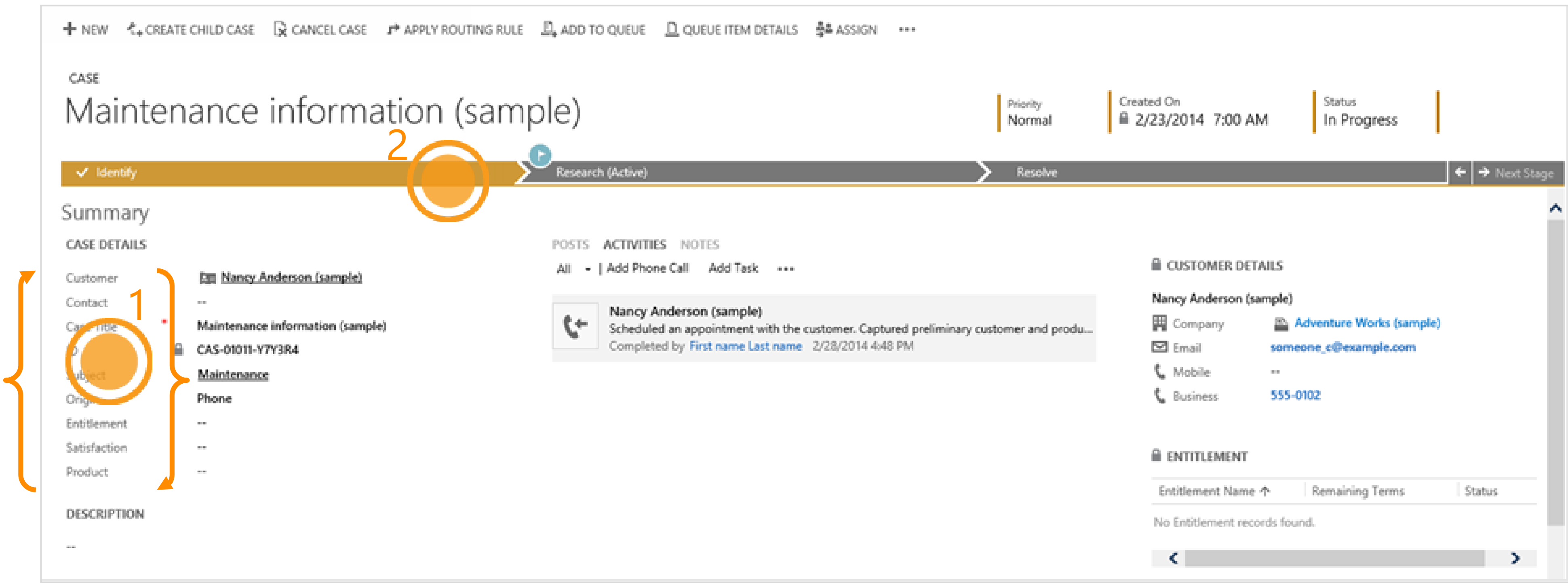
To help resolve a case, each stage and step is clearly outlined in the process bar at the top of the screen. You'll see the process bar when you move from one stage to the next when you're working on a case.



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

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

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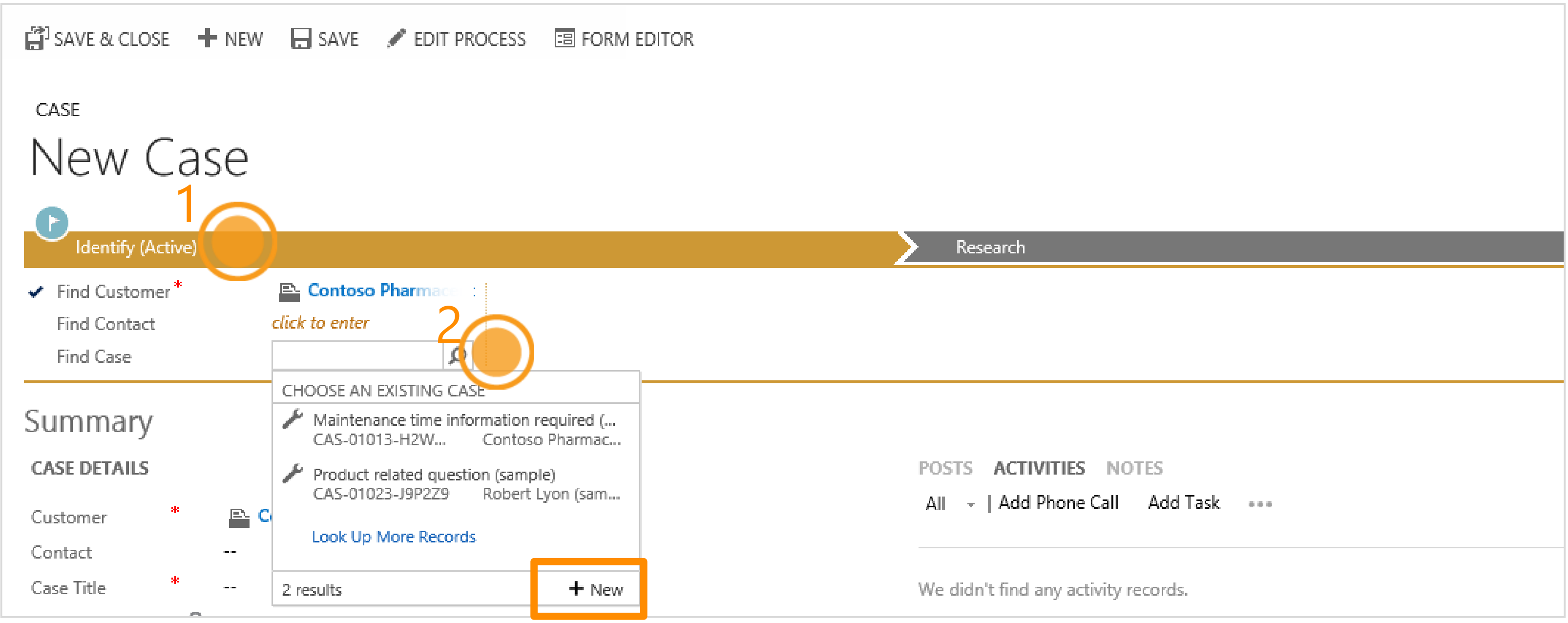
When you select an existing customer, the customer details will show the contact details, along with recent cases and activities for the customer.



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

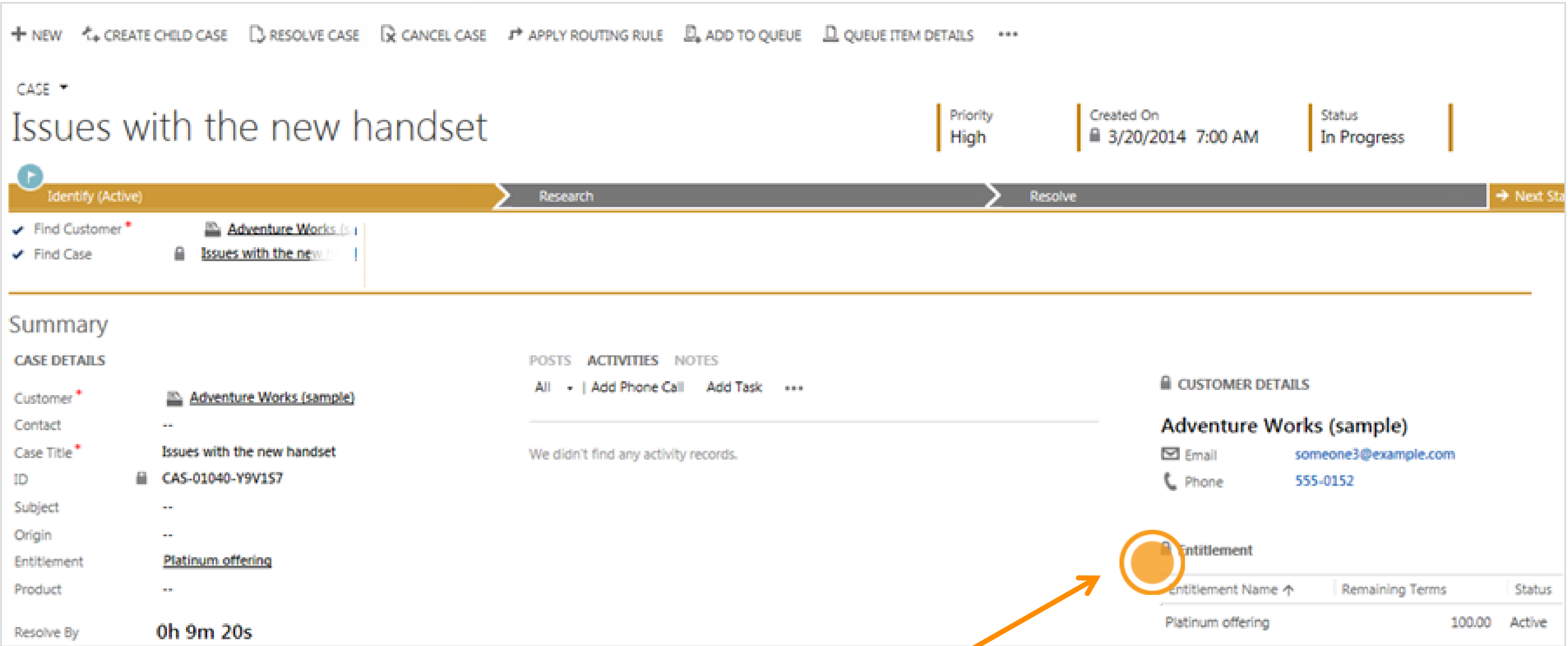
2. Choose the **Look up** button and select an existing case.

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.

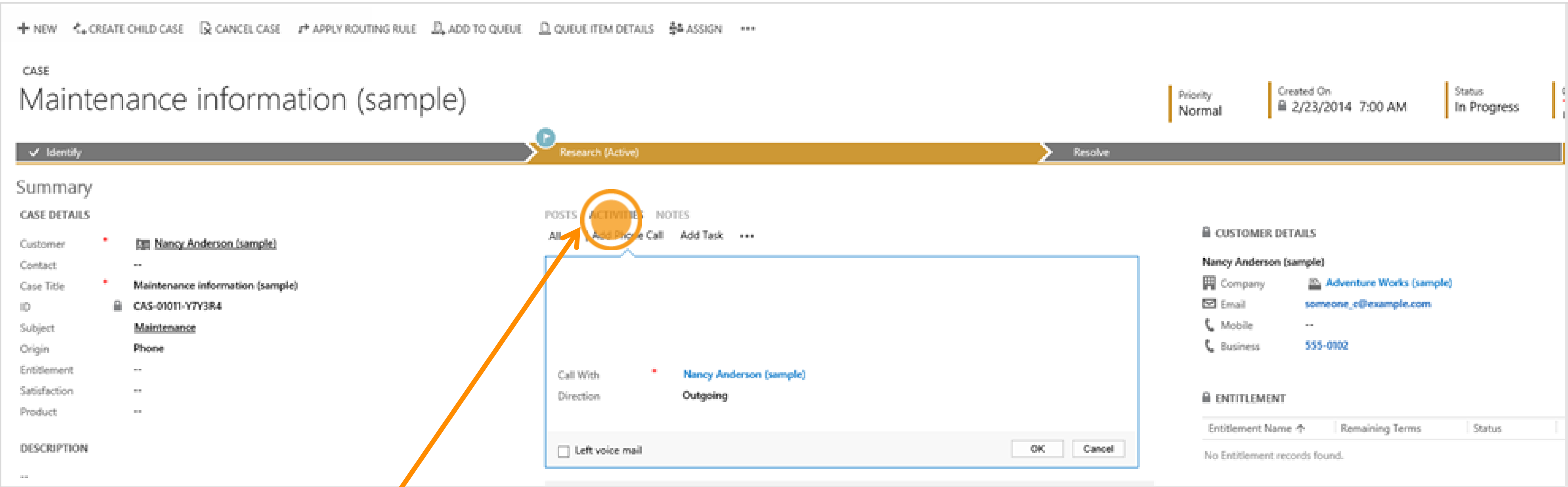
If the entitlement is not applied automatically, choose the **Entitlements Look up** button and then select an entitlement.



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

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

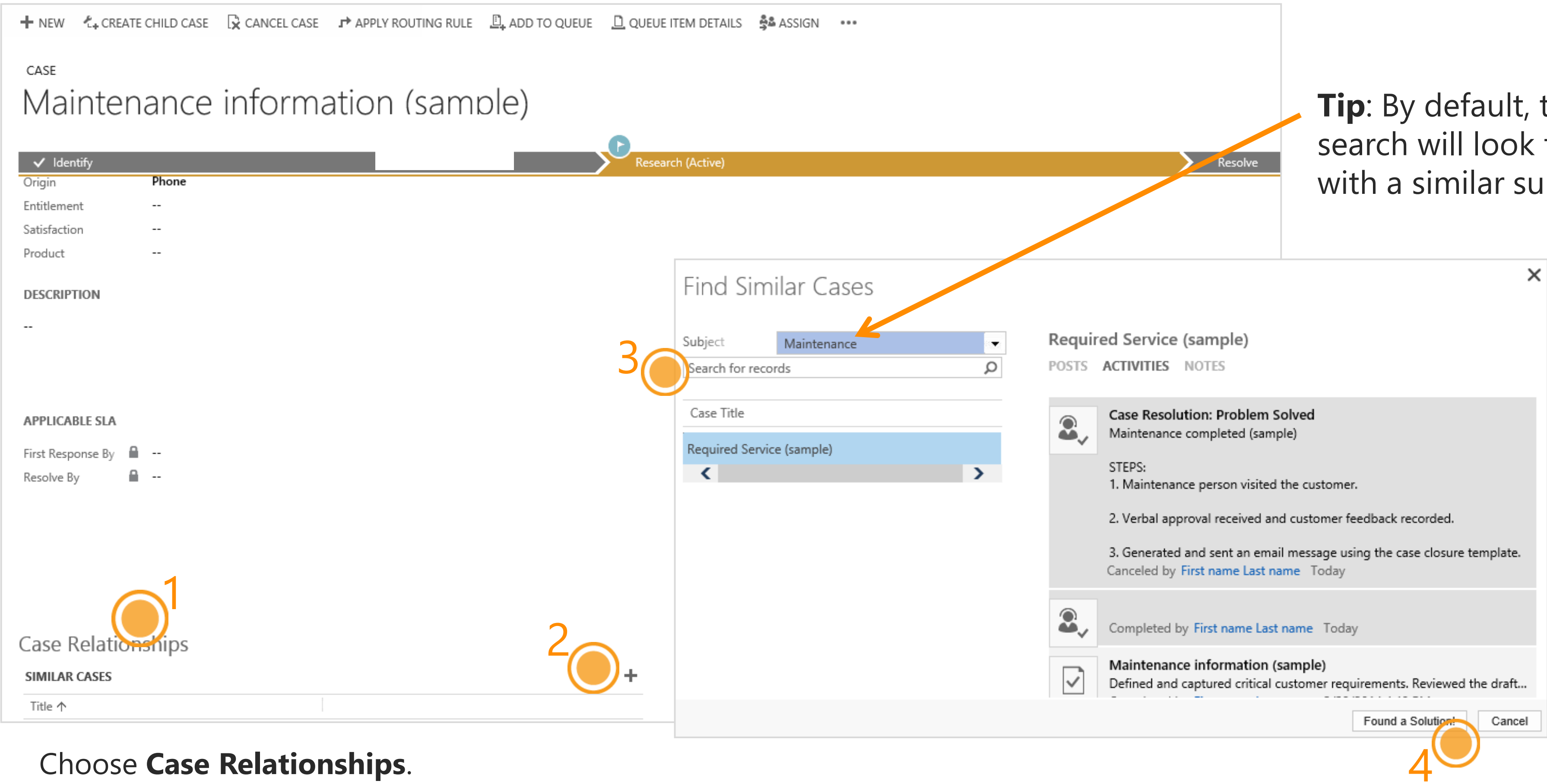
track your communication history



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.

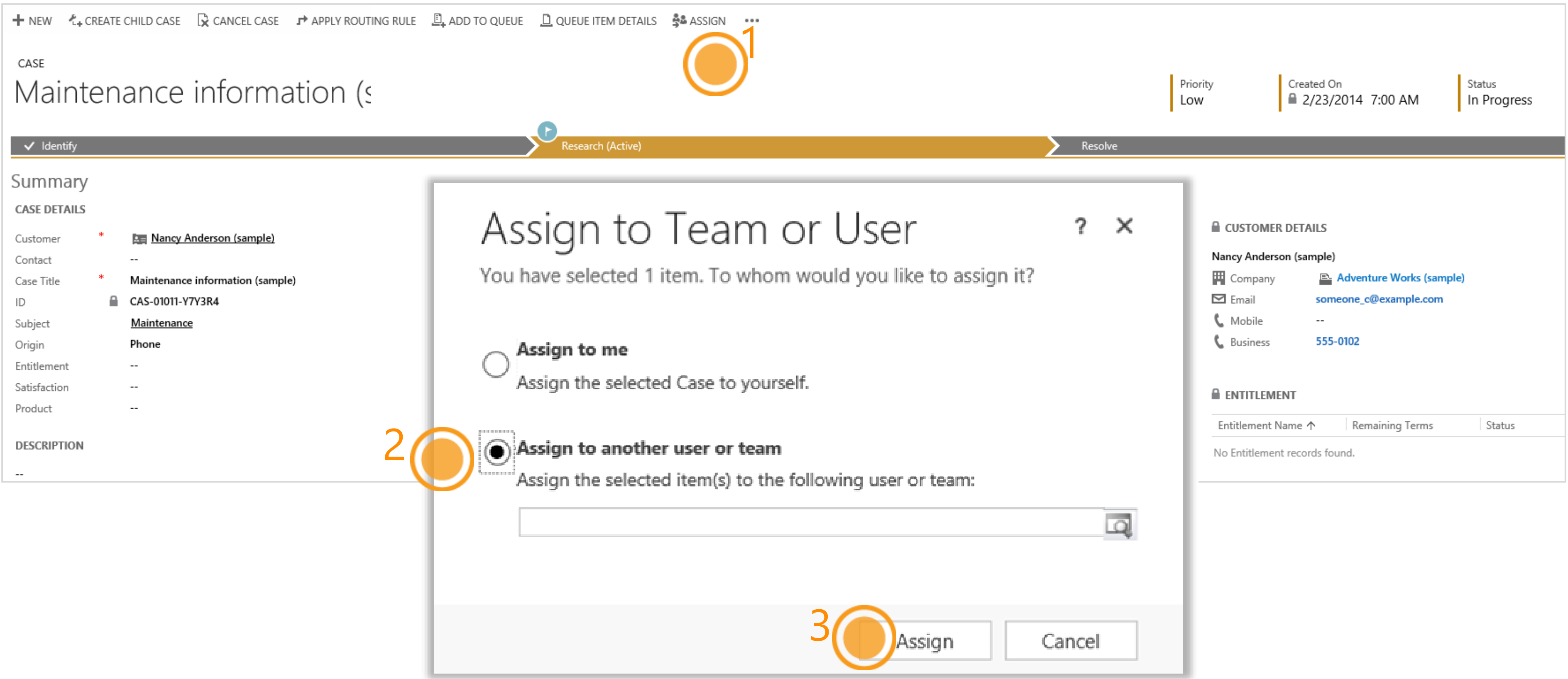


Tip: By default, the search will look for cases with a similar subject.

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**.

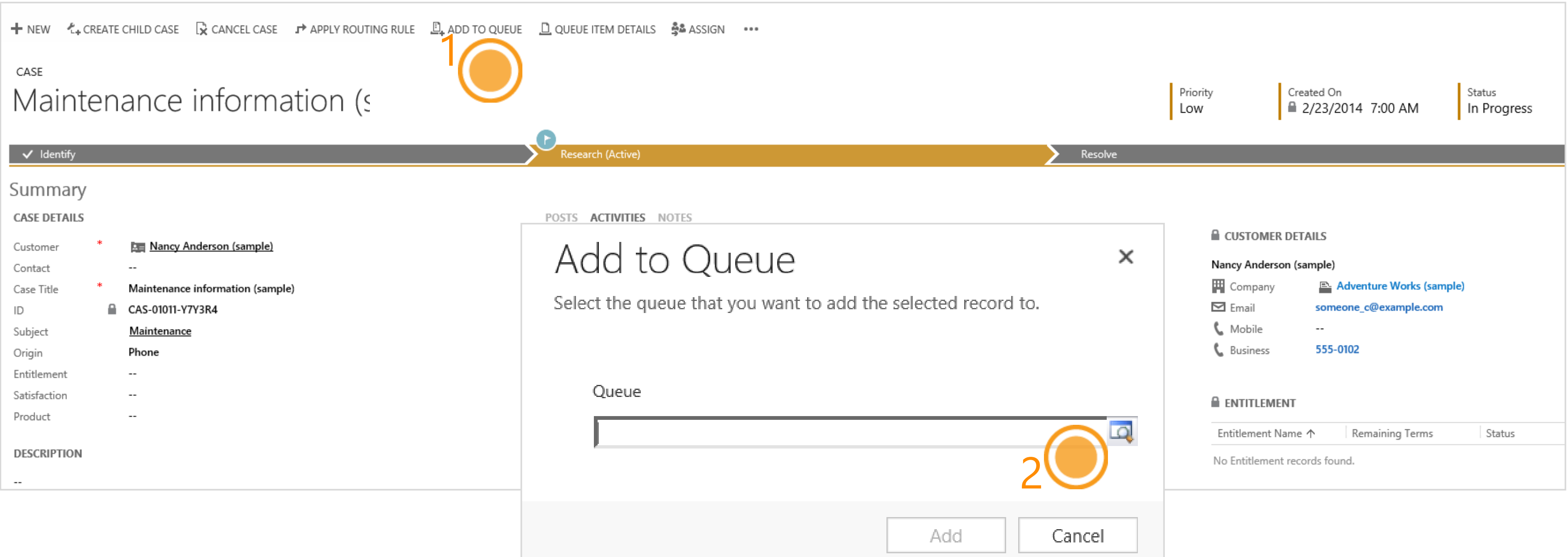
reassign a case to someone else

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.



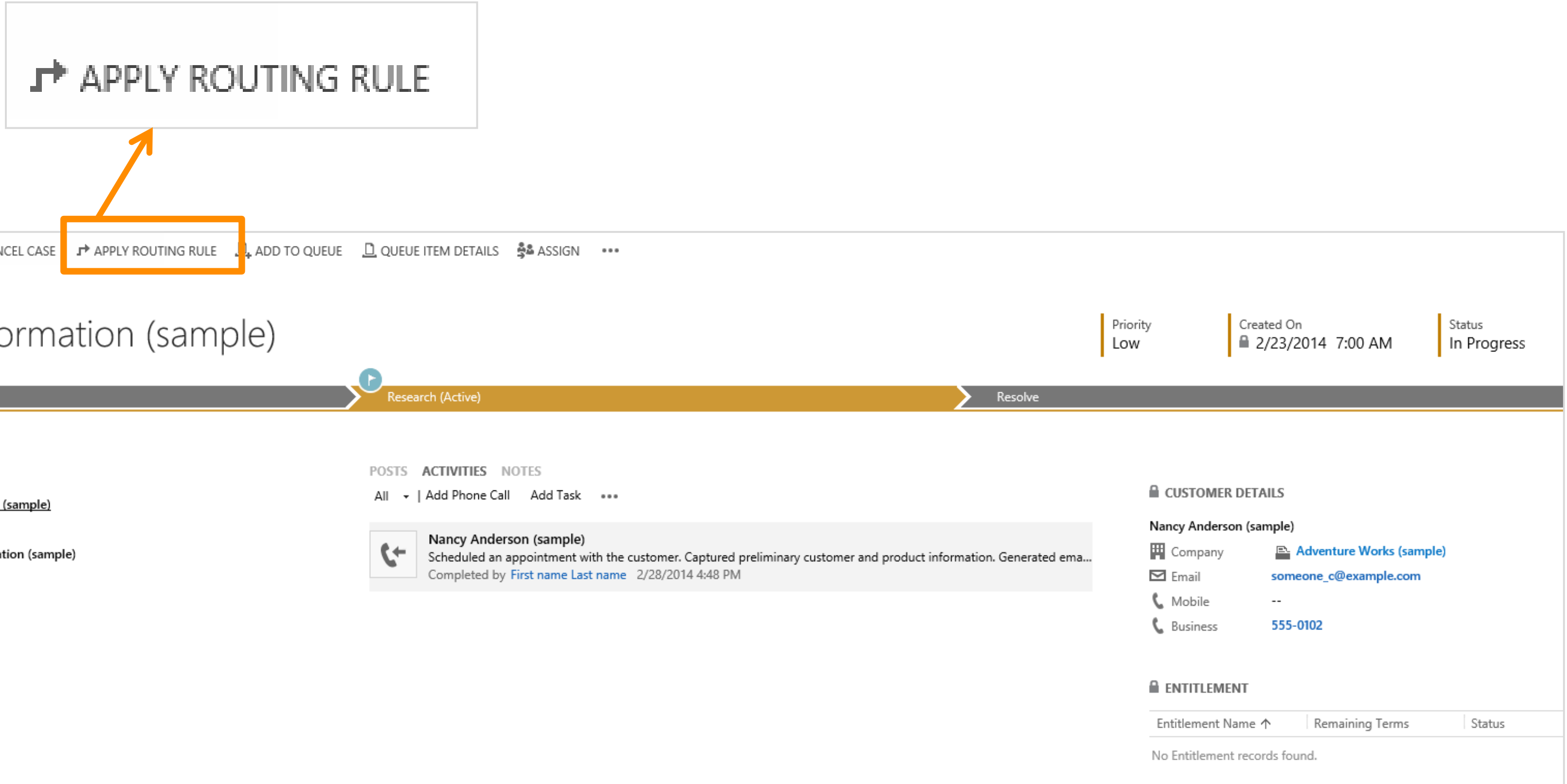
put a case back in to the queue

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.



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.



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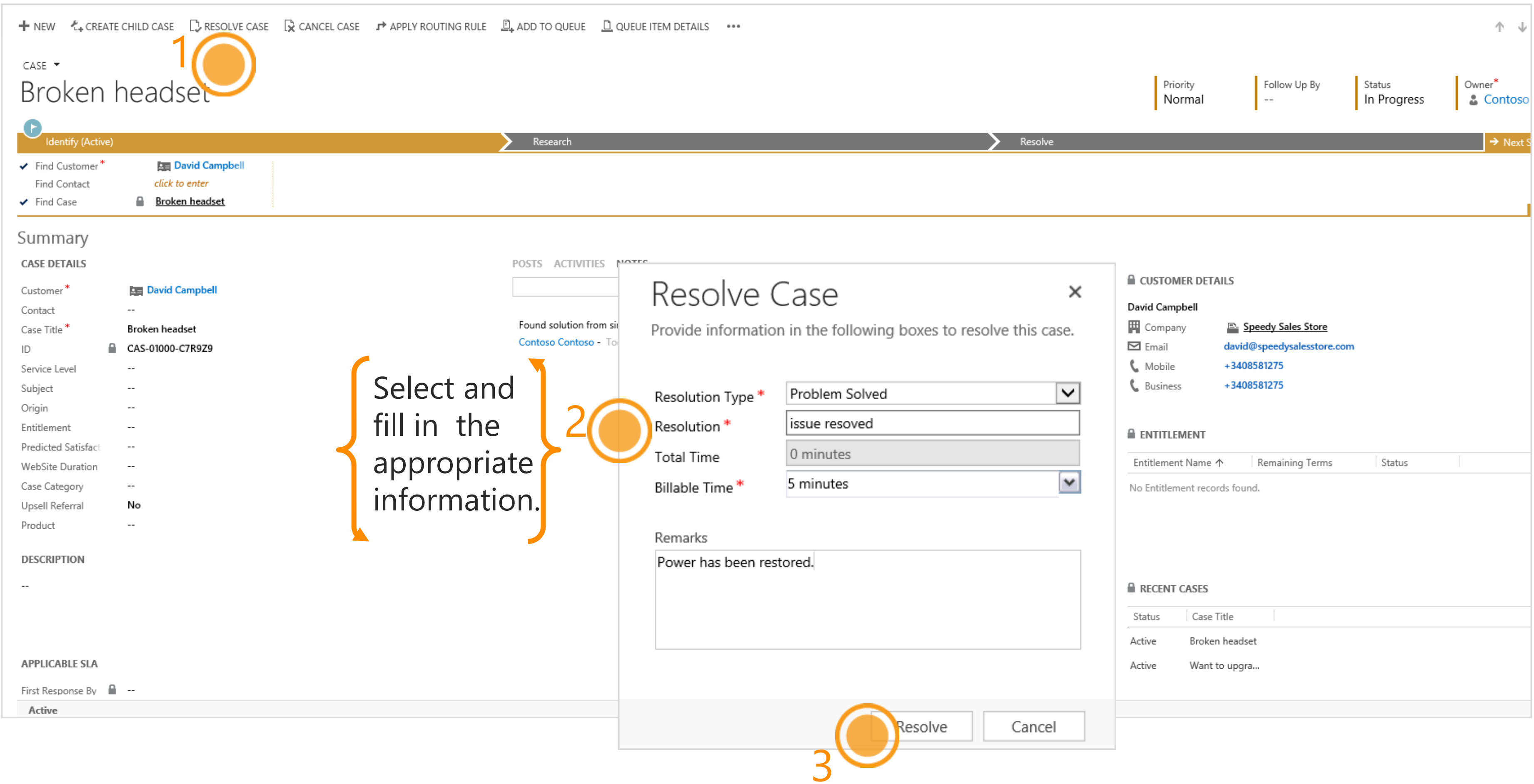
close a case

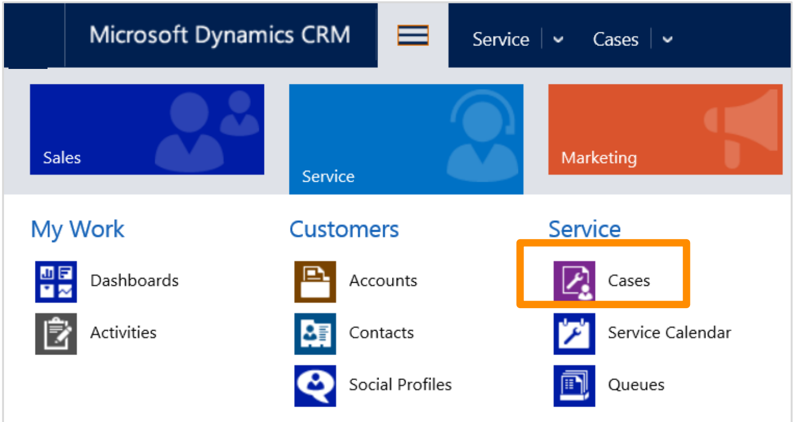

NEW
CREATE CHILD CASE
RESOLVE CASE
CANCEL CASE
APPLY ROUTING RULE
ADD TO QUEUE
QUEUE ITEM DETAILS
1
CASE
Broken headset
Priority
Normal
Follow Up By
--
Status
In Progress
Owner
Contoso
Identify (Active)
Research
Resolve
Find Customer
David Campbell
Find Contact
click to enter
Find Case
Broken headset
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
POSTS
ACTIVITIES
Select and fill in the appropriate information.
2
Resolve Case
Provide information in the following boxes to resolve this case.
Resolution Type
Problem Solved
Resolution
issue resoved
Total Time
0 minutes
Billable Time
5 minutes
Remarks
Power has been restored.
Resolve
Cancel
3
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...

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.

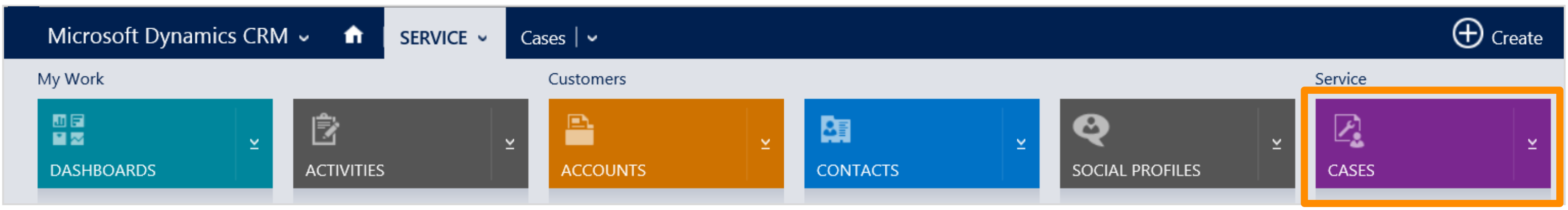
If your screen looks like this (latest version):

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**.



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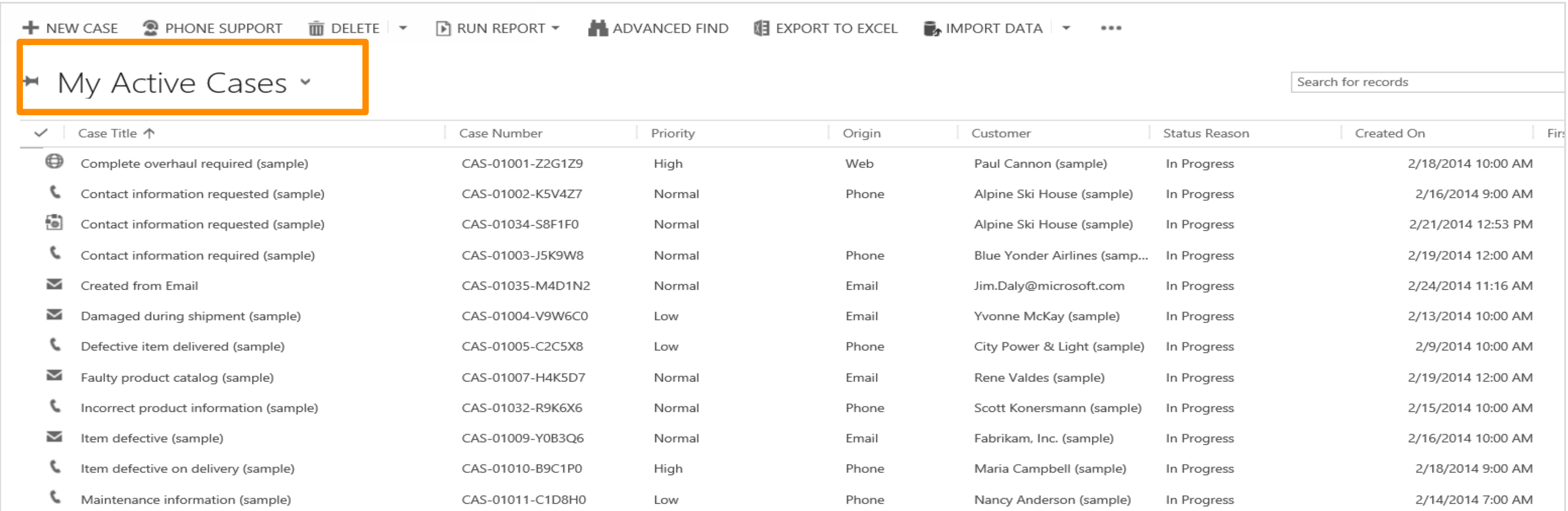
On the next screen, you will see a list of your active cases.



Case Title	Case Number	Priority	Origin	Customer	Status Reason	Created On
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

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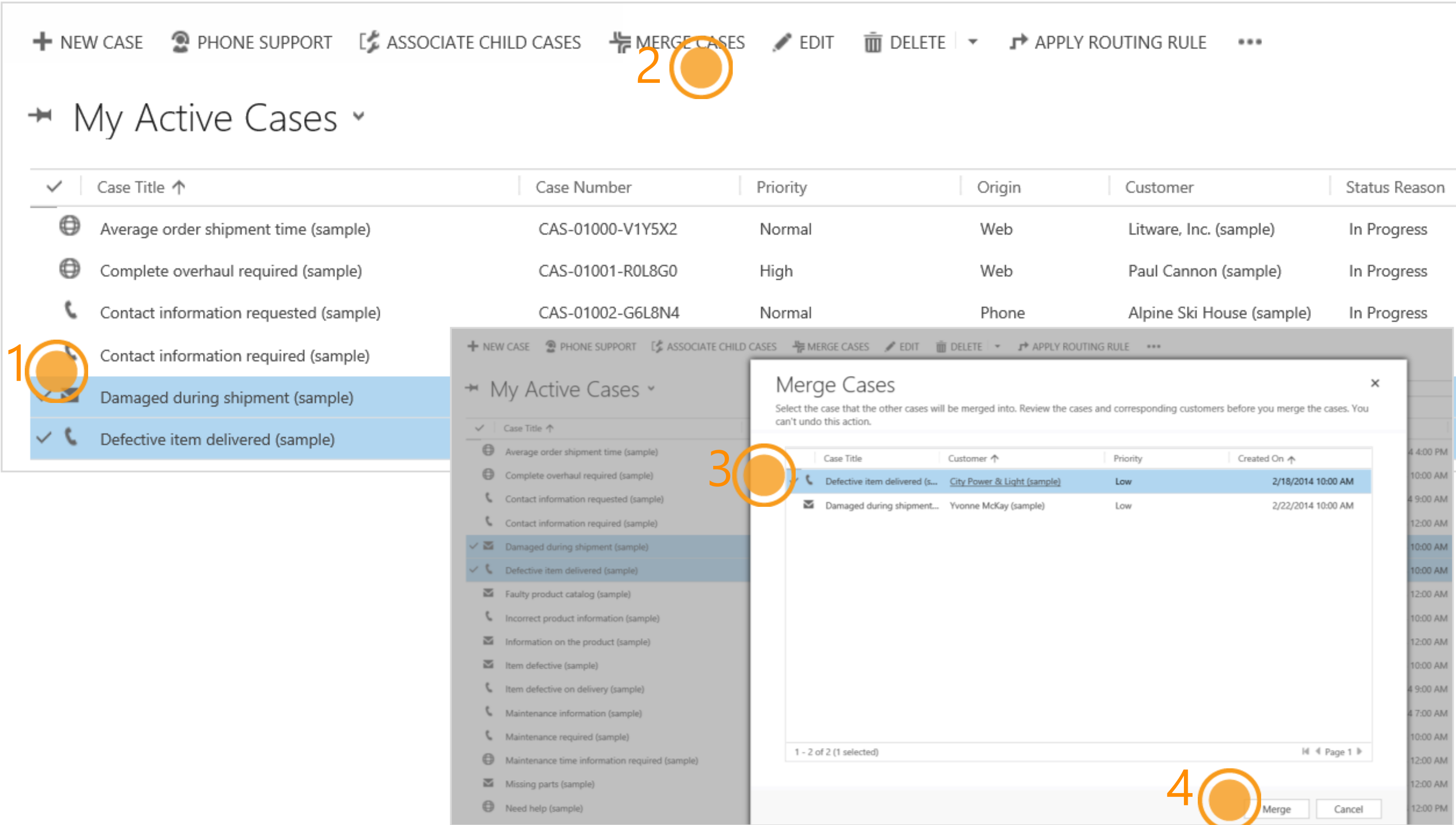
When a case is merged, the state of the case is changed to cancelled and the status is changed to merged. That's because it's merged into another case and all of the open case activities, emails, and attachments are now associated with the case it was merged into.

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**.



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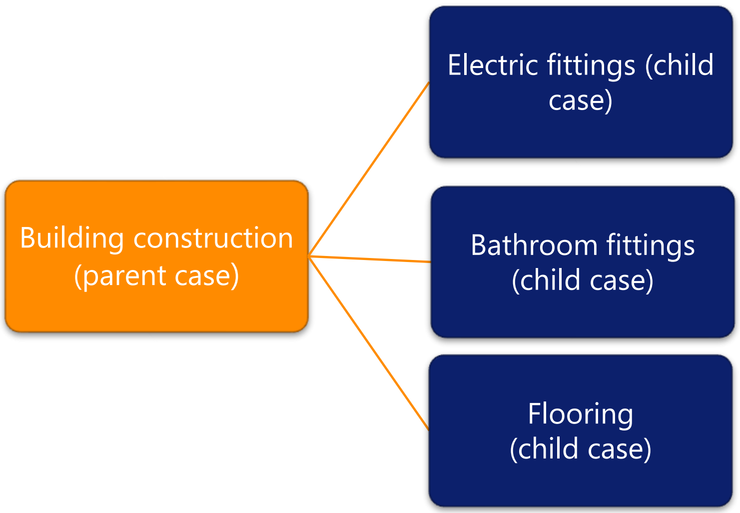
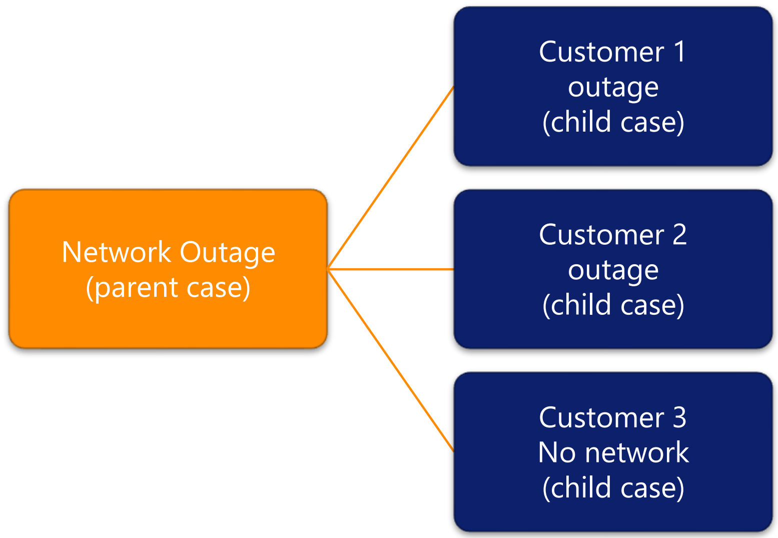
track issues efficiently

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.



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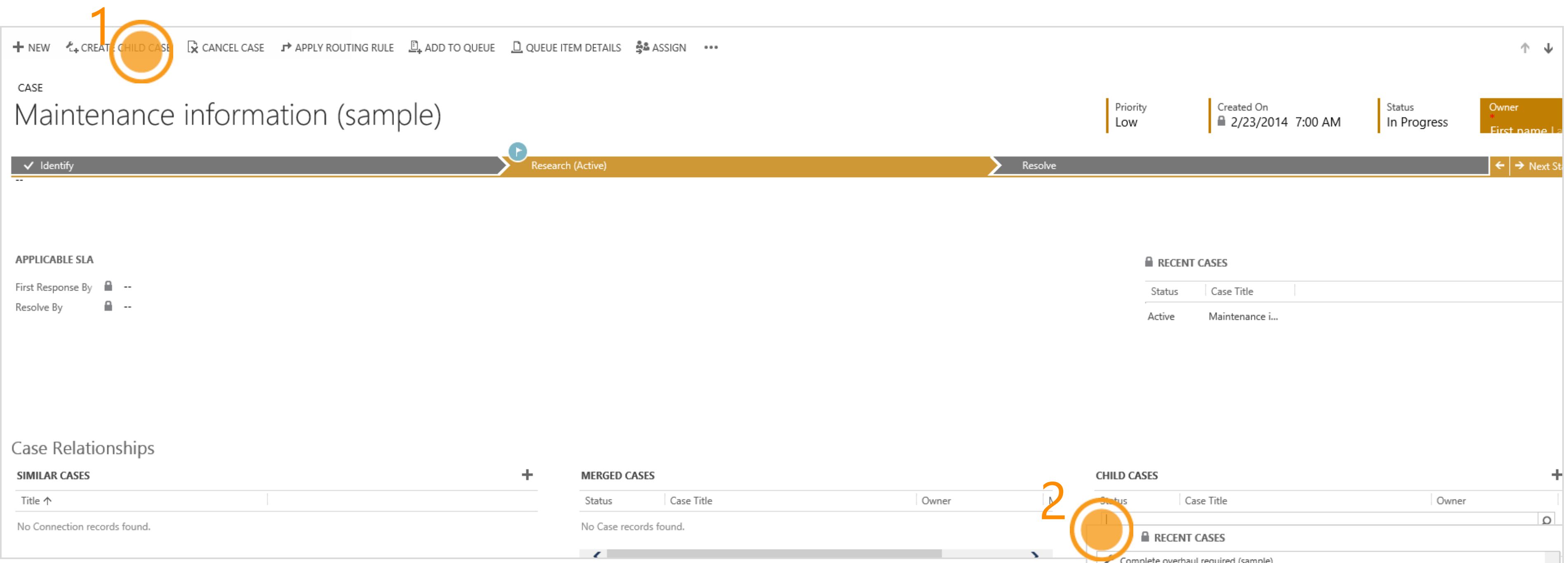
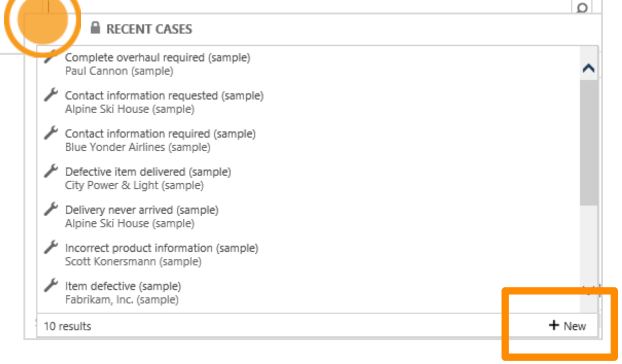
add a child case

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





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.

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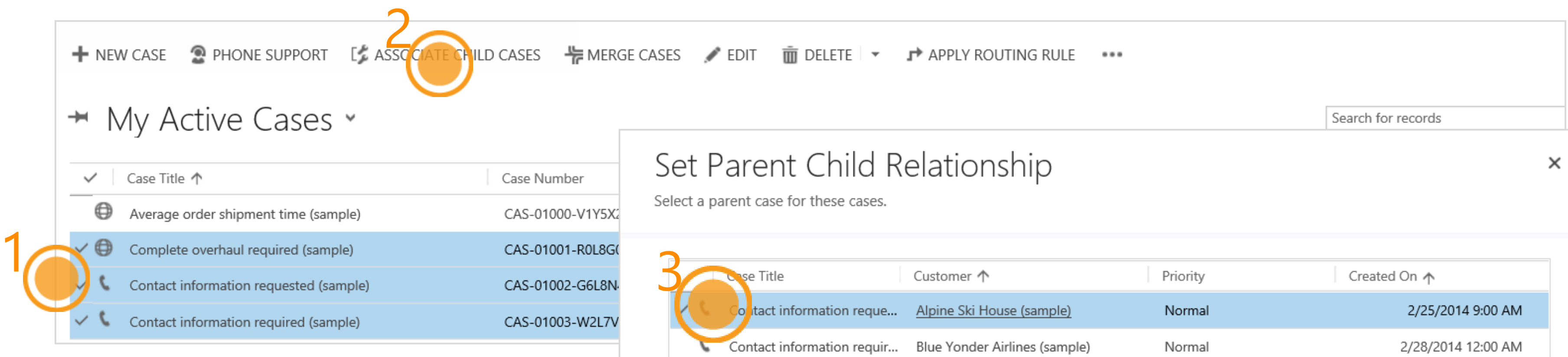
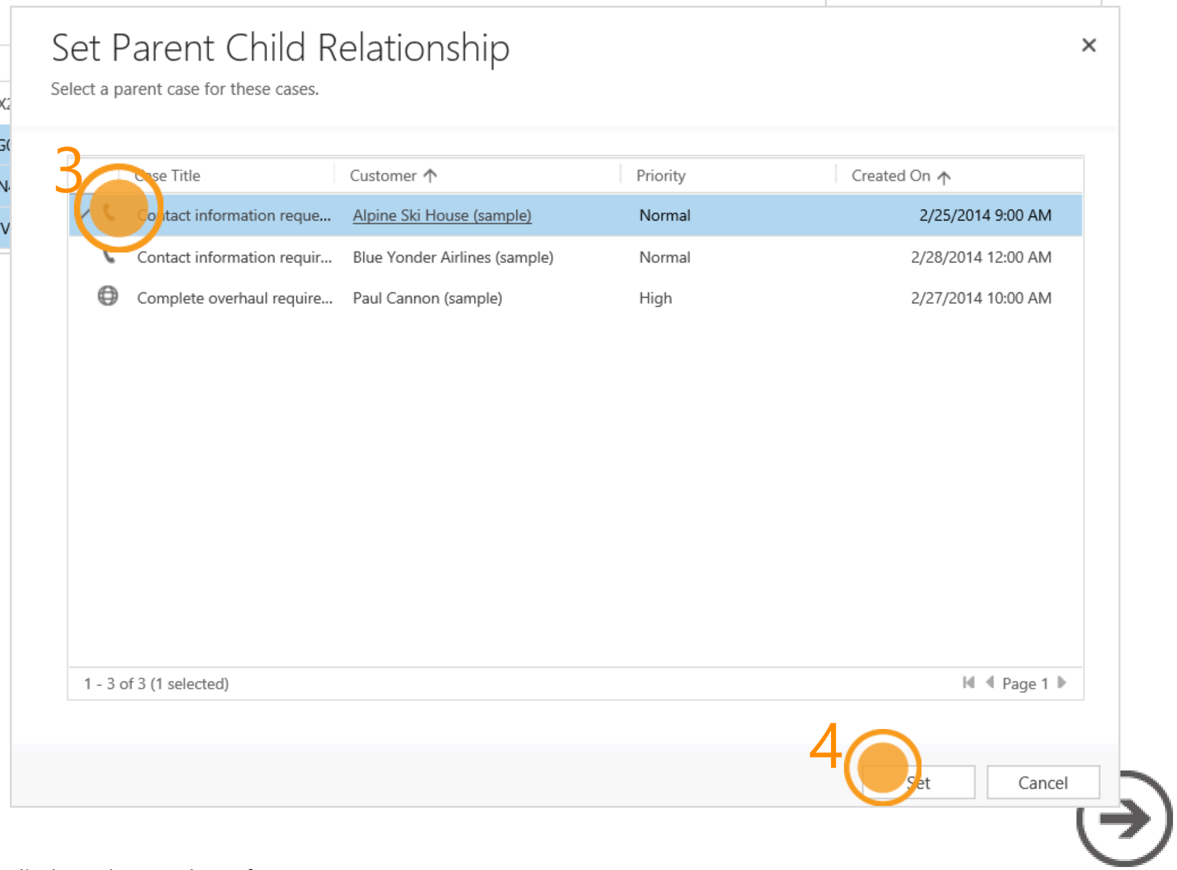
You can also associate an existing case as a child case from your active list of cases.





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**.

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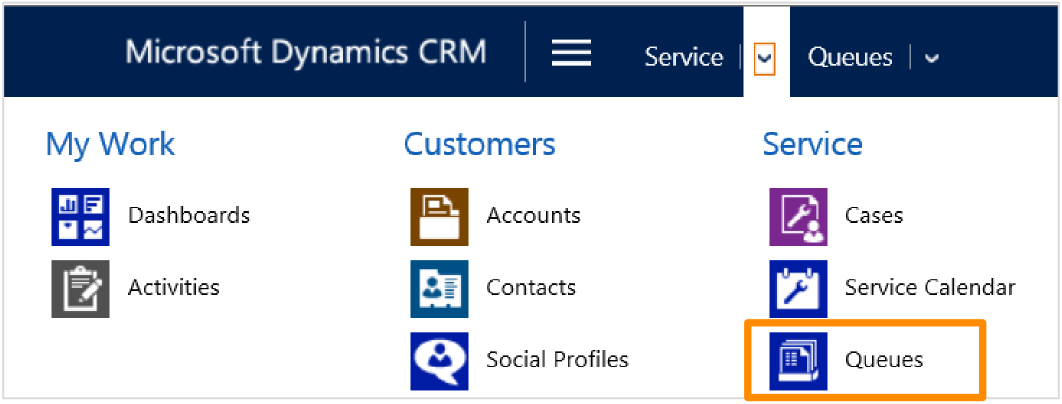
look for open cases that need to be worked on

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

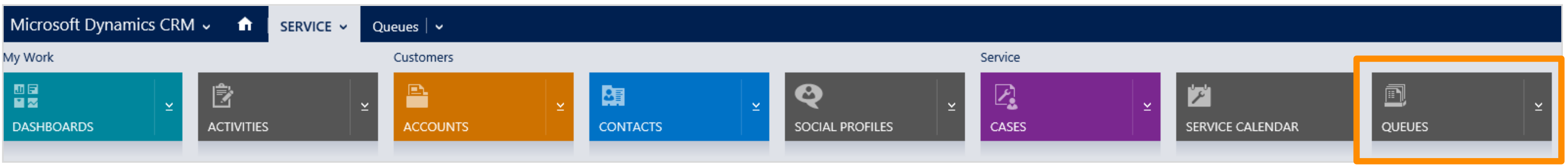
If your screen looks like this (latest version):

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



If your screen looks like this (older versions):

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



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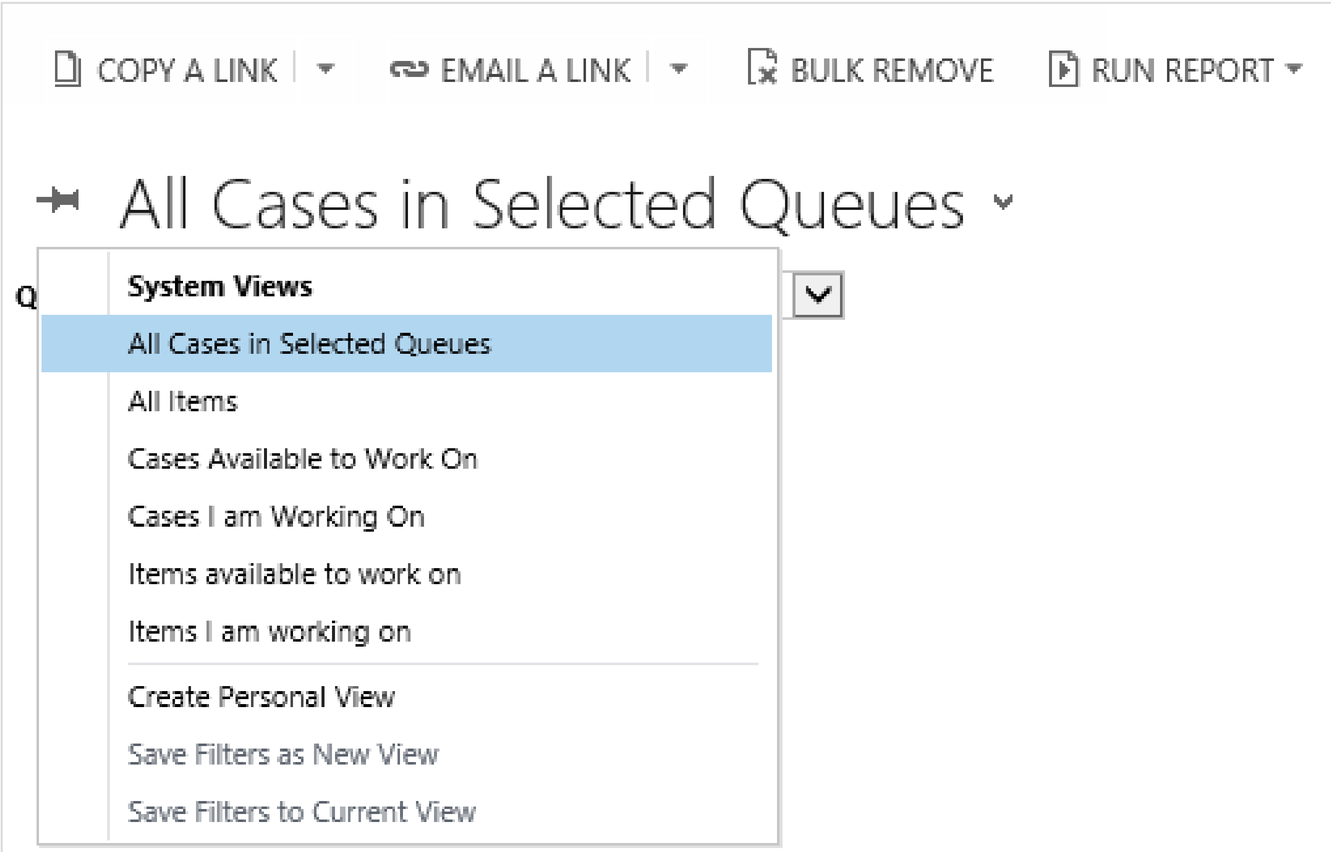
Select a view.



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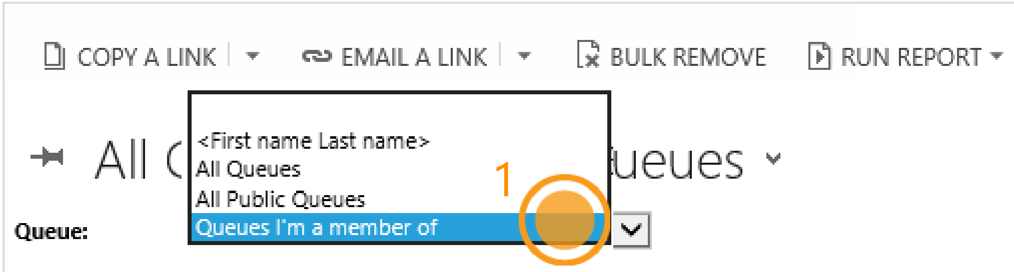
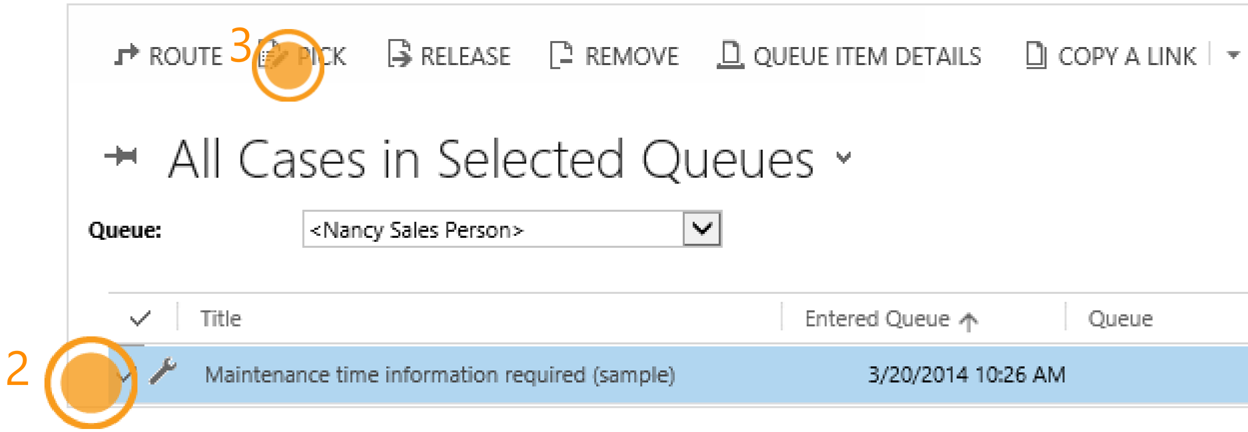
1. Select a queue.

2. Select the case or item that you want to work on.

3. On the command bar, choose **Pick**.





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