Lab: Case Resolution Processing

Objectives

- Create a case.
- Associate a phone call with the case.
- Resolve the case.
- Reactivate the case.
- Manage the case through the case resolution process ribbon.
- Resolve the case again.

Exercise Scenario

Scenario: Adventure Works submitted a support case by using an email message named, "**Damaged rim on road series bike."** The CSR received the email message. However, the CSR must enter the case directly into Microsoft Dynamics CRM because he or she is not using Microsoft Outlook. Although the CSR tried to call, the CSR had to leave a voice mail message that included the instructions. The CSR followed up by sending the customer an email message that included the instructions. The CSR decided that the case should be resolved. However, because the customer called back, the CSR had to reopen and handle the case. The CSR put the case through the correct case resolution process and then closed the case.

High Level Steps

1. Create the case
2. Call the customer to get more details on the case.
3. Resolve the case
4. Reactivate the case

Detailed Steps

1. Create the case
    i. On the **Navigation Bar**, hover over **Microsoft Dynamics CRM**, and click **SERVICE**.
    ii. Hover over the **Services** button on the **command bar,** click **Cases**.
    iii. On the **Cases Command Bar**, click New **Case**.
    iv. In the **Title** box, type "Damaged rim on road series bike".
    v. In the **Subject** box, select "**Maintenance"**.
    vi. In the **Customer** box, click the Lookup icon. In the Look Up Record dialog box, type "**Adventure Works**" and select the account.
    vii. In the **Case Type** drop-down list, select **Problem**.

viii. In the **Case Origin** drop-down list, select **E-mail**.
ix. Click **Save**.
x. Within the **Collaboration Area,** click the **Notes** tab.
xi. Click the Enter a Note text box, and then type "Customer would like a replacement rim".
xii. Click **Done**.

2. Call the customer to get more details on the case.
   i. On the Case form's **Collaboration Area**, click **Activities**.
   ii. On the Actions toolbar, click **Add Phone Call**.
   iii. In the **Description Box**, type, "Called Adventure Works to gather additional details."
   iv. Place a checkmark in the **Left Voicemail** check box. Click **OK**.
3. Resolve the case
   i. On the Case form's **Command Bar**, click **Resolve Case**.
   ii. In the **Resolve Case** dialog box, select **Problem Solved** in the **Resolution Type** drop-down list.
   iii. In the Resolution box, type "E-mailed customer".
   iv. In the **Billable Time** drop-down list, select **5 minutes** and then click **Resolve**.
   v. Click **Cases** in the command bar.
   vi. On the list of Cases, change the View to **My Resolved Cases**. The case just created appears on the list.
4. Reactivate the case
   i. From the **My Resolved Cases** view, reopen the case just resolved.
   ii. On the **Case Command Bar**, click **Reactivate Case**.
   iii. On the **Reactivate Case** dialog, click **Reactivate**.
   iv. On the **Process Bar**, click **Next Stage**.
   v. On the **Research** stage in the **Similar Cases** field, click **Find.**
   vi. In the **Find Similar Cases** dialog, select case titled, "Required Service (sample)", and click **Found a Solution**.
   vii. Click **Next Stage**.
   viii. On the **Resolve** stage, in the **Resolve Case** field, click **Mark Resolved.**
   ix. On the **Resolve Case** resolution dialog, in the **Resolution** field, type, "Talked to customer and sent a new part."
   x. In **Billable Time**, type "10 Minutes"
   xi. Click **Resolve**.
   xii. Close Internet Explorer.

Lab: Managing Knowledge Base Articles

Objectives

In this lab, you will create, submit, and publish a Knowledge Base article. Be aware that in this lab, a single user creates a draft article, submits it for approval, and then approves the draft article. Frequently this work process will be performed by several different users, having one user creating the draft article, and another user submitting the article for approval and so on.

Exercise Scenario

A quality control manager informs a service representative that there is a flaw with a line of quick release brakes and asks the service representative to create a Knowledge Base article.

The service representative creates the article by using the Solution to a Problem article template. The service representative wants to inform customers about the company deciding to offer a free replacement for all defective quick release brakes. To qualify for this offer, customers are required to provide their account information, and a time and date they want to have the defective brakes collected and replaced with a new model.

Step By Step

1. Create an Article
    a. On the **Navigation Bar**, click Microsoft Dynamics CRM, click SERVICE, and then click ARTICLES
    b. In the **Articles** view, click **New**.
    c. In the **Select a Template** dialog box, click **Solution to a Problem** and then click **OK**. This returns the New Article form.
    d. In the Title box, type "Quick Release Brakes".
    e. In the **Subject** box, click the Lookup icon. In the **Subject** Lookup dialog box, select **Service**, and then click **Select**.
    f. In the Key Words field, type "**brakes**".
    g. In the text area on the New Article form, click in the **Problem** field and type "**Problem with quick release brakes**".
    h. Click in the Solution field and type "Ask customer for time and date to replace".
    i. Click **Save.** The article is saved with a status value of **Draft**.

2. Submit and Approve the Article for Publishing

    a. Click **Submit**. The article status changes to **Unapproved**.

b. Click **Approve.** The article status changes to **Published,** and the article will now be visible to all users and appear in search results.

Lab: Resolving a Case with a Contract

Exercise Scenario

Adventure Works, a reseller for Contoso, would like to purchase a contract for Level 1 and Level 2 Support. They would like to purchase 500 minutes of Level 1 Support and 500 minutes of Level 2 support time. Once the contract is created, they will immediately wish to use two hours of their allotted "Level 1 Support" to schedule a training session with an appropriate technician. The training session has already taken place.

As the customer service representative, you need to perform these activities:

- Create a Contract Template for Duration of Time.
- Create a Contract using this Contract Template that is set to begin today.
- Create the necessary Contract Lines as described in the scenario.
- Invoice the Contract
- Open the case and associate the contract and contract lines.
- Create and close a 2-hour appointment activity associated with the case, and resolve the case.
- Verify that the remaining allotment for the contract line has decreased appropriately.

Step By Step

1. Create a new template
    a. From the **Navigation Bar**, hover over **Microsoft Dynamics CRM** and click **Settings**.
    b. Hover or click on the **Settings** menu and then click **Templates**.
    c. On the Templates page, click **Contract Templates.**
    d. At the top of the **Contract Templates** data grid, click **New**.
    e. In the new contract template form, select or type the following information:
        i. **Name:** Type "Time-based Support**"**
        ii. **Abbreviation**: Type "TBS"
        iii. **Billing Frequency**: select Monthly
        iv. **Allotment Type**: Time
        v. Click **24 x 7 support**.
    f. Click Save and Close.
2. Create a new contract
    a. From the **Navigation Bar**, hover over **Microsoft**

Dynamics CRM and click **Service**, then click **Contracts.**

b. On the **Contracts Command Bar**, click **New.**
c. In the **Template Explorer** dialog, select the **Type "TBS"** template and then click **Select**.
d. In the **General** section of the form, select or type the following information:
    i. **Contract Name:** Type "Standard Support Agreement for Adventure Works"
    ii. **Customer:** Click the lookup icon. In the **Lookup Record** dialog, select **Adventure Works (Sample).**
    iii. **Contract Start Date:** Select today's date.
    iv. **Contract End Date:** Select one year from today.
    v. Accept the default values for the rest of the fields.
e. Click **Save**.
f. On the **Navigation Bar** of the Contract form, to the right of the record name, click or hover over the more action arrow, and click **Contract Lines.**
g. On the **Related Contract Lines** view, click **Add New Contract Line.**
h. In the **General** section of the form, select or type the following information:
    i. **Title:** Type "500 Minutes of Level 1 Support"
    ii. **Total Cases/Minutes :** Type "500"
    iii. **Total Price :** Type "500"
i. On the **Command Bar**, click **Save,** and then close the form**.**
j. On the **Related Contract Lines** view, click **Add New Contract Line.**
k. In the **General** section of the form, select or type the following information:
    i. **Title:** Type "500 Minutes of Level 2 Support"
    ii. **Total Cases/Minutes :** Type "500"
    iii. **Total Price :** Type "500"
l. On the **Command Bar**, click **Save,** and then close the form**.**
m. Click **Standard Support Agreement for Adventure Works after Contracts** on the **Navigation Bar.**
n. On the **Contract Command Bar**, click **Invoice Contract**.

3. Create a new case and associate it with a contract
    a. On the **Navigation Bar**, click **Microsoft Dynamics CRM**,

click **Service.**

b. Hover or click **Service** and click **Cases.**
c. On the **Cases Command Bar**, click **New Case**.
d. In the **Case Details** section, type or select the following:
   i. **Title:** type " Level 1 Incident for Active Case "
   ii. **Customer:** click the lookup icon and then select "Adventure Works (Sample)"
   iii. **Subject:** select "Delivery"
   iv. **Case Type:** select "Problem"
   v. **Origin**: “Phone”
   vi. In the **Form Header,** type or select the following:
   vii. **Status Reason :** select "In Progress"
   viii. **Priority** : select "High"
e. On **the Case Command Bar**, click **Save**.
f. Click the lookup button on the **Contract** field and select “Standard Support Agreement for Adventure Works”
g. Click the lookup button on the **Contract Line** field, select **“**500 Minutes of Level 1 Support” in the list.

4. Resolve the Case and validate the remaining allotments.
   a. Click **Resolve Case** in the **Command Bar**.
   b. Type "CSAT" in the **Resolution** text field, accept the default values of 0 minutes in the **Total Time** and **Billable Time** fields, and then click **Resolve**.
   c. Click the link in the **Contract Line** field to navigate to the form for the “500 Minutes of Level 1 Support” contract line. Note that the **Allotments Used** and **Allotments Remaining** fields reflect the amount of time used to resolve the case.