ERP Training

D365FS - Call Logging Reference Guide

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1. Introduction

Dynamics 365 Customer Engagement (D365 CE) Field Service (FS) application is the replacement for the legacy system.

The Call Logging team will take the details of incoming calsl and will do an initial check on the customer's support entitlement. When the call is saved, a Work Order is automatically created by the system.

If there is a support dispute the call will be pushed to the Contracts team to investigate and then directed to the Technical Vetting team. If there is no dispute, the case will be passed directly to the Technical Vetting team, who will contact the customer to see if there is an easy fix. If they cannot resolve the case over the phone, they will identify and add the required Work Order Products as a guide for the parts needed to resolve the issue.

The case is then passed to the Resource Controllers team who will add the required parts and service costs, if applicable, to the Work Order. This is then submitted to the Logistics team to source the parts or to purchase the parts if required, and then to ship the parts to the required destination, usually for the engineer to install or swap.

The Resource Controller will track the delivery of parts before creating a booking for the engineer's visit using the Schedule Board, or the Bookings grid in the WO.

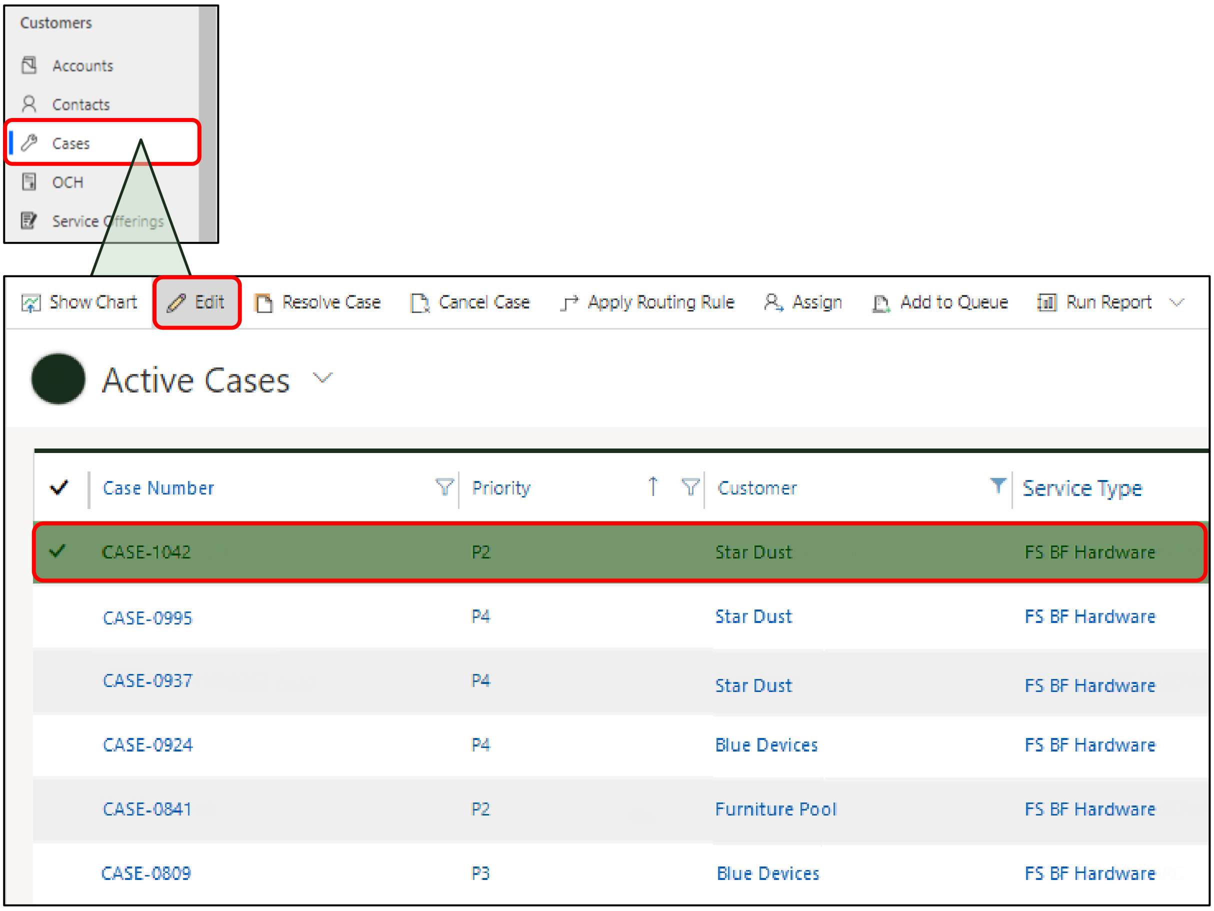
The engineer will receive the booking information, parts required, and customer details on their mobile device. They will indicate the status of the work through the various system statuses, for example, Travelling, In Progress, etc. They will also create an RMA to return unused parts, or parts for repair, on their device which will be received by the system, constantly updating as new information is sent by the engineer.

When all work is complete, the Work Order is marked as complete, and the case is marked as complete.

When the engineer has completed work on site and updates the system through his mobile, the status of the Case is set to Resolved. The Case is automatically Closed by the system after the lapsed period recorded in the Resolve/Closure Time field on the customer account record. If the customer rings to say the work is not complete, the case cannot be reopened.

2. Cases

2.1. *View a Case - Case list page*

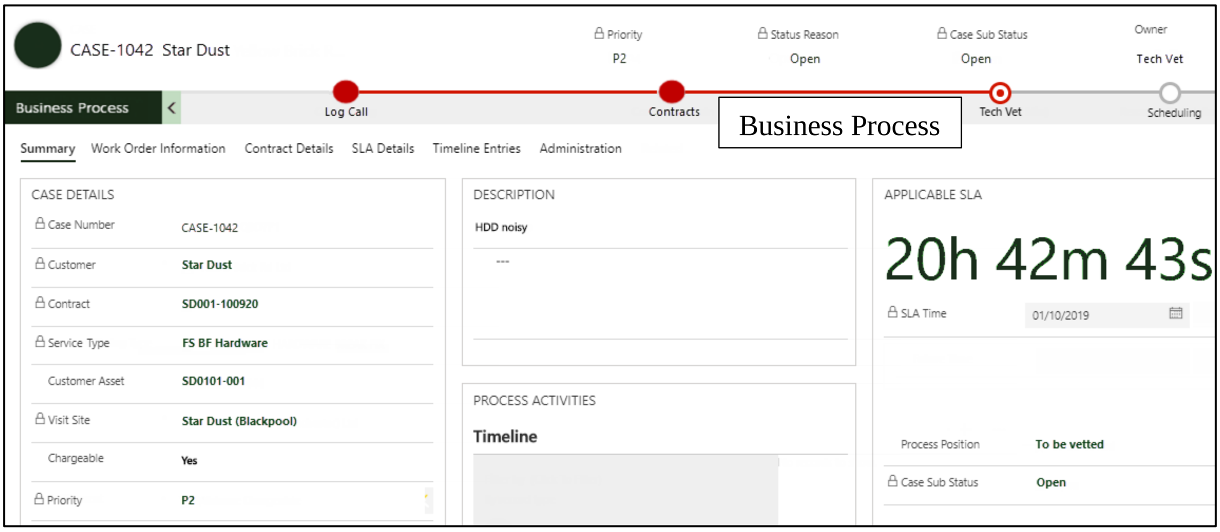


When the Incident Responsce Centre (IRC) receive a call from a customer, they will create a case to record the details. For example, a customer rings in to report a fault on one of their servers. To view existing cases in D365FS:

1. From the Navigation pane, select **Cases**. The My Active Cases entity is the default view. You can change this to another view, for example, Active Cases, or Cases - In Progress.
2. Select the case, a tick is displayed and the case record is highlighted.
3. In the Command bar, select **Edit** to open the case record.

> **Information**: do not select other hyperlinks (highlighted in blue), for example, Priority, as this will open the Priority form and not the case. You can also open the case by double-clicking any part of the case that is text, such as the Case Number.

2.2. View a Case - Case form



The form header shows the following details:

- **Case Number**: this is assigned automatically by the system.
- **Priority**: this is the priority assigned to the case.
- **Status Reason**: this is the overall status of the Case, for example, Open, On Hold, or Resolved.
- **Case Sub-Status**: this is the sub-status within one of the overall statuses.
- **Owner**: this populates automatically with the end user name, but will change through the course of the case journey according to the next owner, for example, Tech Vet, Contracts, or Resource Scheduling.

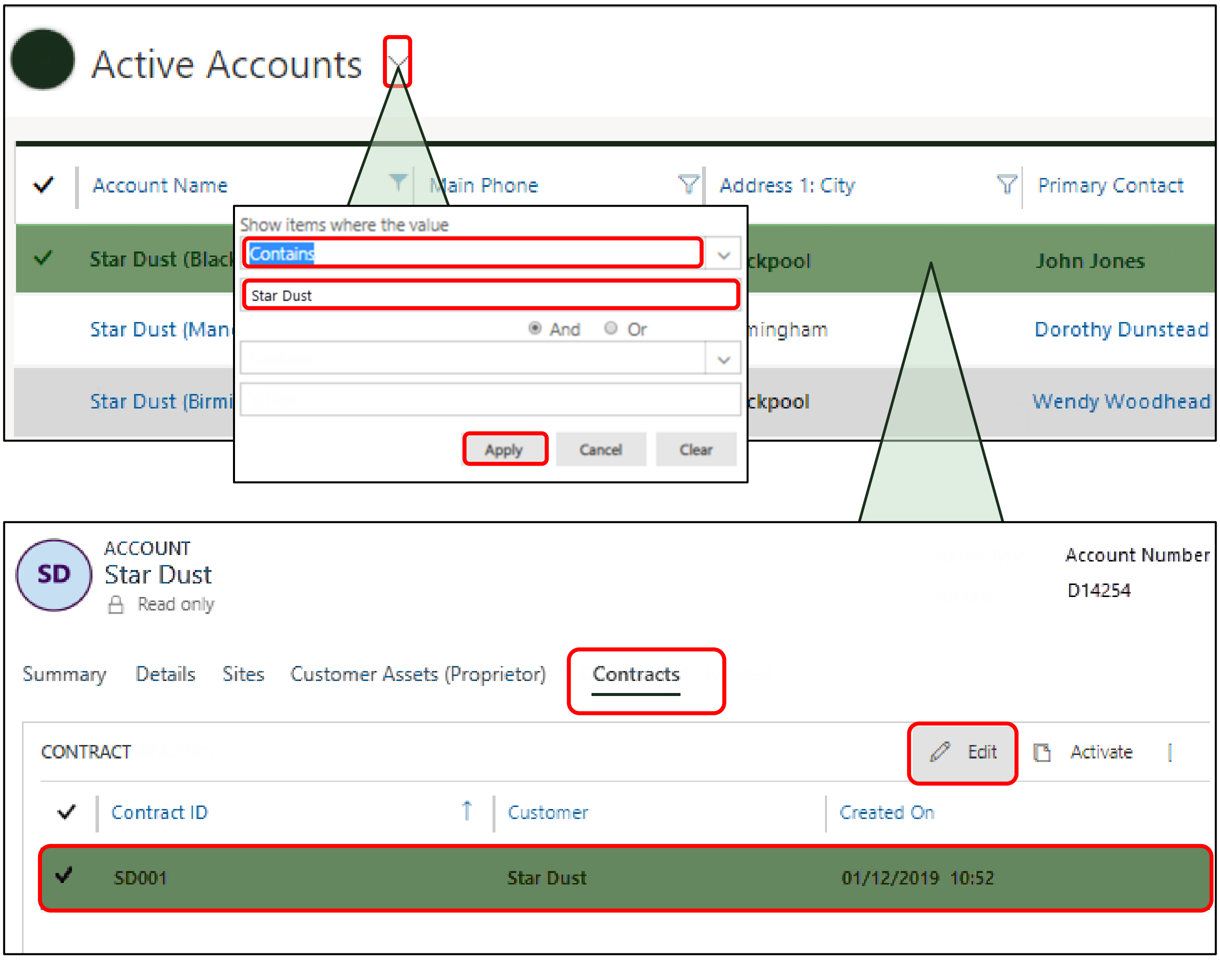
A Business Process Flow (BPF) is displayed below the form header. This indicates where the Case or Work Order lies.

Below the BPF are a number of form tabs. Select each form tab to view the information located in the tab sections.

Some fields in the tab sections are links. If you select one, for example, Customer, the customer form will open for you to view the customer record information

3. Call Logger - Create a Case

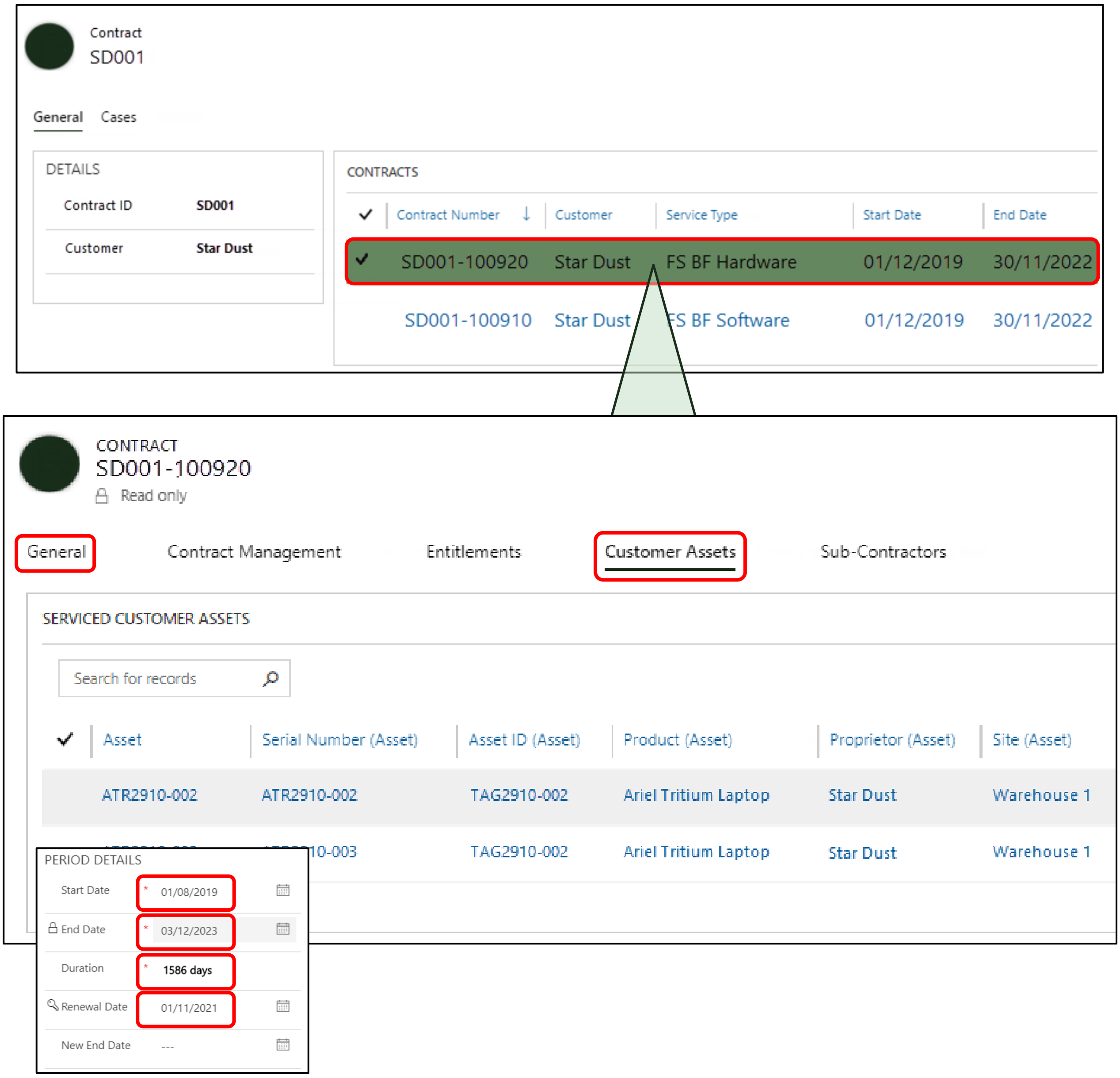
3.1. Create a Case - Support Check



As a Call Logger, when you receive a call, you will have to confirm the details the customer gives you in D365FS. For example, you will want to check that the customer is active, has a support contract that is current, and that the product the customer is calling about is covered by the support contract. To confirm the details, you will have to navigate to those areas in D365FS.

1. In the Navigation pane, select **Accounts**. The Active Accounts list page is displayed.
2. In the Account Name column, select the filter. The Show items where the value box is displayed.
3. In the first field, select **Contains**.
4. In the second field, enter the Account name on which to search.
5. Select **Apply**. The Account record for the searched for customer is displayed.
6. Select the **Sites** tab to verify the customer site is correct.
7. Select the **Contracts** tab to view the Contract header for that Account.
8. Select the record, a tick is displayed and the record is highlighted in green.
9. Click **Edit**, or double-click the Contract header record to open it and view the existing Contracts for that customer.

Create a Case - Support Check (Continued)



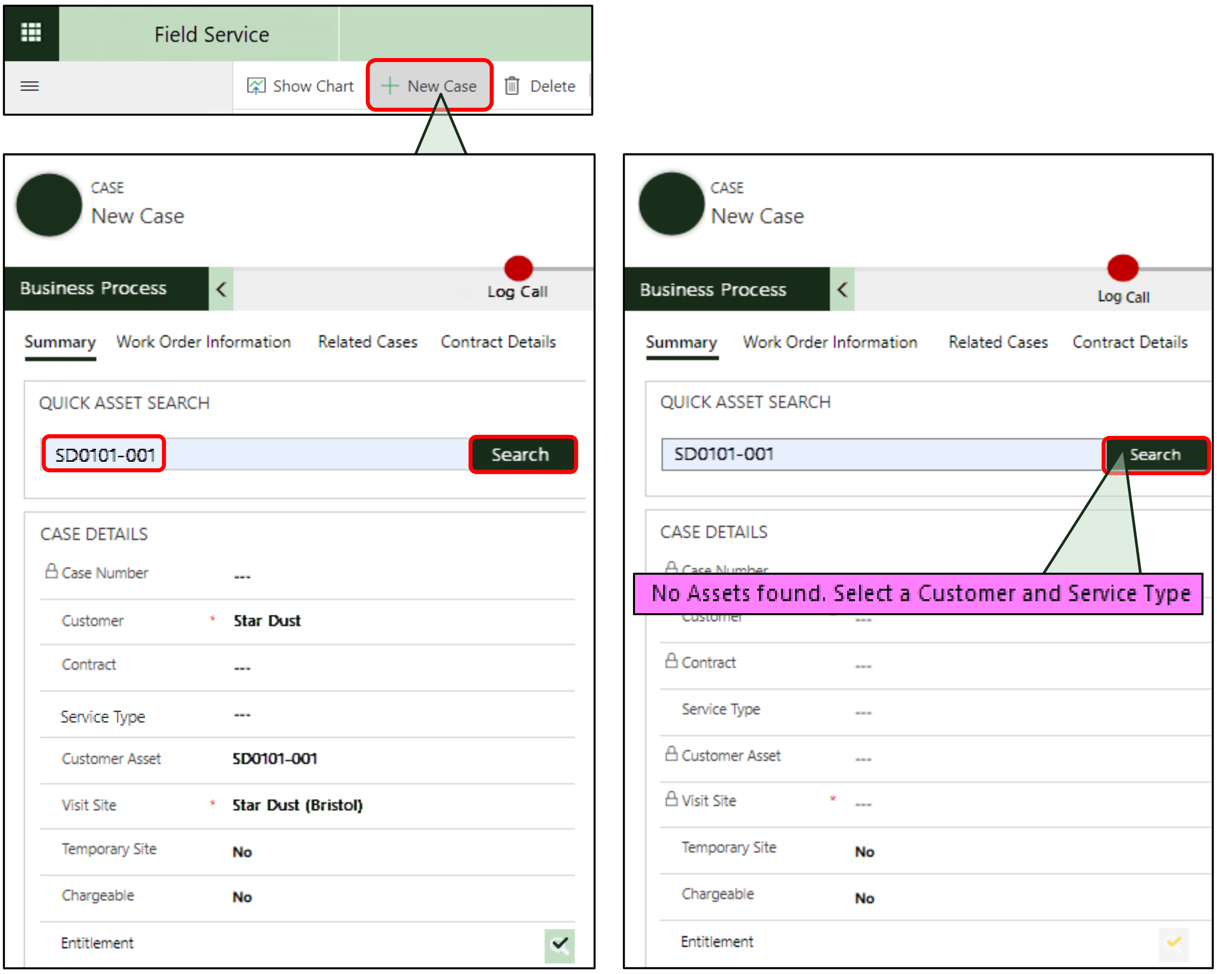
The Contract header record opens.

In the CONTRACTS section, the Contract(s) between the customer and the company are displayed.

10. Select the relevant Contract and double-click to open it and view the details. The Contract record opens.
11. Select the **Customer Assets** tab.
12. In the SERVICED CUSTOMER ASSETS section, you can view the Assets for the customer, and the site at which the Asset is located.
13. Select the **General** tab. At the bottom of the form, view the dates in the PERIOD DETAILS section to verify the support is current.

Important: if the Asset is not supported, we could create it on D365FS, but the case would become chargeable. If there is any doubt, pass the case to the Contracts department.

3.2. Create a Case



To create a new case:

1. Select **+ New Case** from the Menu bar. The New Case form is displayed.

Before you enter the Call Logging data into the Case form, you may wish to search for the Asset about which the customer is contacting us. To do this you can use the QUICK ASSET SEARCH at the top of the Case record.

2. Enter the Serial Number into the Quick Asset Search field.
3. Select the **Search** button.

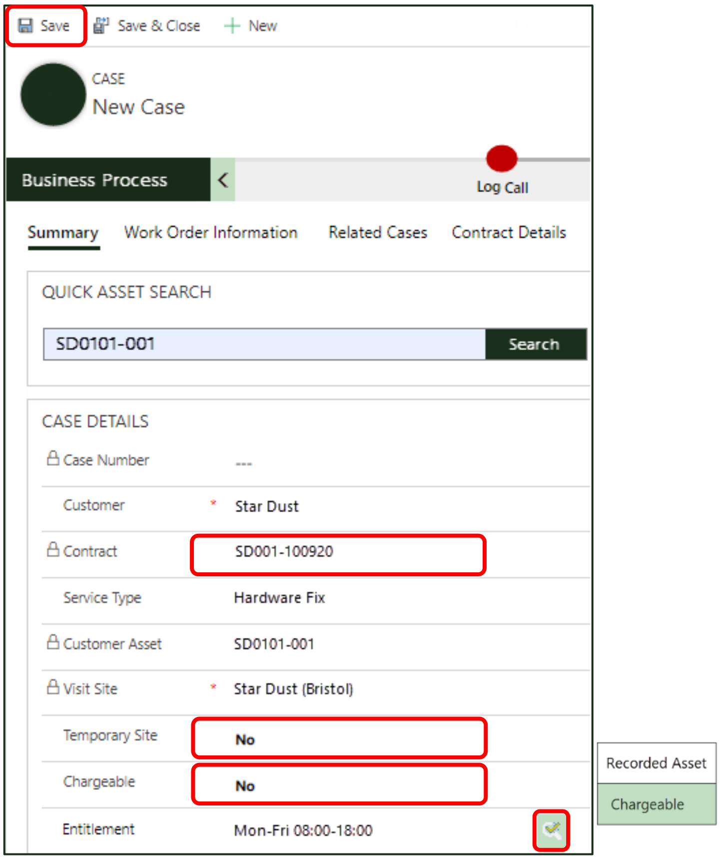
If the Asset is found within the system, the following fields will be automatically populated:

- Customer
- Customer Asset
- Site
- Chargeable: set to No, change to Yes if the case is chargeable.
- Subcontracted To: if the Asset is assigned to a subcontractor

If the Asset is not found, a system message will inform you that a Customer and Service Type are required to locate the correct record. The form fields will remain blank.

Important: this is normally an indication that the Asset does not exist in the system. You can still create a Case but will have to add the Asset. The Case will be chargeable and passed to the Contracts department for them to decide how to proceed.

Create a Case (Continued)



Where the Asset has been found and the fields are populated by the system, further information is required by the system for it to find the correct record.

4. **Contract**: select a Contract.

Information: the system will dynamically filter the Contract list to present only the Contracts for the Asset on which the search is based.

If the Contract is found within the system, the following fields will be automatically populated:

- Service Type
- Visit Site

5. **Temporary Site**: this defaults to No. Change this to Yes if this is a temporary site.
6. **Chargeable**: change this toggle field to **Yes** if the Case is chargeable.
7. **Entitlement**: select the Entitlement field Validate button. This button will become enabled when the Site field is completed.

The system will attempt to find any available entitlements matching the field contents entered in the CASE DETAILS fields. If there is more than one entitlement match, then you will be presented with a set of records to choose from. The list order will have the most relevant entitlement matching the criteria at the top, with the least relevant at the bottom.

8. **Contact**: select the main contact for the site (not shown).
9. **Fault Type**: select the type of fault, for example, **Hardware failure** (not shown).

Select **Save**. The Case record is saved and displays a system generated Case number.