Call Logging Lesson Plan

	Instructions
Login details	**Login details for the delegates**: https://ABC-training.crm11.dynamics.com Hand reference guides to delegates
General details	**Health and safety**: Ensure the delegates are aware of fire alarm drills and other evacuation procedures. Check for wiring, trip hazards, and other safety issues. **Course details**: **Course duration**: This is a this is a 2-day D365FS Call Logging course. **Start & finish timings**: 09:00 - 12:00 and 13:00 - 16:30. **Mobile Phones**: Ensure your phones are on a discreet setting. **Documentation:** Please refer to the reference guides as we progress through the course. **Questions:** Feel free to ask questions at any time.
Objectives	By the end of this two- day course you will be able to: ✓ Understand your role in relation to Call Logging ✓ Access and navigate key entities for your role ✓ Create and manage Cases, Assets, Accounts and Contacts ✓ View and edit Case details, and Contact details

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Agenda	This course introduces you to: ✓ Introduction to Call Logging ✓ Getting Started with D365 ✓ Working with Accounts, Contracts and Assets ✓ Working with Cases

General introduction	Dynamics 365 Customer Engagement (D365 CE) FS is the replacement for the legacy system. When a secure call is received, the Call Logging team will take the details of the call 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. The call will be pushed to the Contracts team to resolve any entitlement dispute, or to the Technical Vetting team who will contact the customer to see if there is an easy fix, but who will then identify and add the required Work Order Products as a guide for the parts needed to resolve the issue if they cannot resolve it over the phone. If the asset is not identifiable, or is not on a support contract, the Quotes team will create a quote and send it to the customer to approve the cost of the labour and parts. The Resource Controllers team 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. Where there are parts shipped to site or bybox, the Resource Controller will track the delivery of parts before creating bookings for the engineer's visit using the Schedule Board, or the Bookings grid in the WO. The engineer receives the booking information, parts required, and customer details on their Samsung J6 device. They 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. Three days later the Case is automatically Closed by the system. If the customer rings to say the work is not complete, the case cannot be reopened.

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Title Bar	In the Title Bar: **Dynamics 365 FS** - this is a heavily configured environment. **Note**: if the drop-down arrow is visible, show the delegates the User Interface with main CE environments, i.e., Sales etc. Search (magnify glass) - you can search for records across multiple entities. Note: have an example to demonstrate the power of global search **User's name** - select this to Exit the application.

Dashboards	D365FS Landing Page: when you log into D365FS, the default dashboard is displayed, this is determined according to your role. For example, if you work in Contract Admin, you will see the Contract Admin dashboard when you log in. **Note**: if you have a managerial role, for example, Service Delivery Manager (SDM), you will have access to several dashboards. To view a different dashboard, select the drop-down arrow and select the Dashboard from the list. **View the different Dashboards.** Your dashboard will provide a visual display of KPIs, metrics, and data. Through the use of data visualisations, dashboards simplify complex data sets to provide at a glance an awareness of current performance. Typically, this will be through a combination of pie charts, bar charts and data grids.

Navigation Pane	D365FS provides you with the functionality to view and update entities such as Cases and Agreements, according to your role. This is achieved through the use of the Navigation pane. **Note**: review the different entities in the Navigation Pane. Demonstrate WO's, Cases and Contracts.

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Navigation Pane: Accounts LIST Page	**Accounts** – open the Accounts List page from the Navigation Pane. This is a list of all Customer Accounts, Customer Sites, ByBoxes and Warehouses. **Use the drop-down arrow to change the view**. By default, it should display Active Accounts. **Menu bar** – there are a handful of icons in the Menu bar to apply at this List page level. We could add a NEW Account, Delete an Account (if you have the role permission), and we can Refresh the page. **NOTE**: this is a Web based application and like all Web pages it needs Refreshing after performing certain actions. If you cannot see an expected result – then select REFRESH. **Filter** - you can perform a search using the filter. **Note**: have a couple of Customer Accounts on which to search, for example, maybe ABC Ltd – depending on the data and customers in the system. **A-Z** – you can filter on a list page by using the letters at the bottom of the List page to display Accounts whose name begins with that letter. **Links (Blue titles)** – you can open a List page record by double-clicking on the record. Ensure you do not click a blue link; this will take you to that form. **Practice**: search for a couple of Customer Accounts. **Note**: to navigate back to a previous page, you can use the Browser arrow or links in different fields to move between Accounts, Cases. WO's, etc. Explain about the **Ellipsis**.

ACCOUNT Record	Open an ACCOUNT record. **Account** - this is the Customer Account name, or Site name. **Service Territory** - this is the physical area. **Owner** - this is the name of the person that created the Account. Below the Account record header are a number of form tabs. Select each form tab to view the information located in the tab sections. **Note**: Customer accounts are the parent of any Contracts. The Customer Account may be a customer, such as Google, or a manufacturer from whom we provide warranty labour, such as Sony. **Note**: quickly review the other tabs. These will be covered in depth when the delegates create an Account record.

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Navigation Pane: Cases LIST Page	**Cases** - open the Cases List page from the Navigation Pane. This is a list of all Cases, Secure and non-secure. **Use the drop-down arrow to change the view**. By default, it should display My Active Cases. **Menu bar** - there are a handful of icons in the Menu bar to apply at this List page level. We will add a NEW Case shortly, Delete a Case (if you have the role permission), and we can Refresh the page **NOTE**: this is a Web based application and like all Web pages it needs Refreshing after performing certain actions. If you cannot see an expected result - then select REFRESH. **Filter** - you can perform a search using the filter. **Note**: have a couple of Cases on which to search. **A-Z** - you can filter on a list page by using the letters at the bottom of the List page to display Accounts whose name begins with that letter. **Links (Blue titles)** - you can open a List page record by double-clicking on the record. Ensure you do not click a blue link, this will take you to that form. **Practice**: search for a couple of Cases. **Note**: to navigate back to a previous page, you can use the Browser arrow or links in different fields to move between Accounts, Cases. WO's, etc. Explain about the **Ellipsis**.
CASE Record	Open a CASE record. **Case Number** - this is the number assigned to this Case by the system when the Call Logger Saves the record. **Owner** - this populates automatically with the end username, but will change through the course of the case journey according to the next owner, for example, Quote Admin, or Tech Support Team Below the Case record header are a number of form tabs. Select each form tab to view the information located in the tab sections. **Note**: quickly review the other tabs. These will be covered in depth when the delegates create a Case record.

CASE - Assign	**Assign a CASE** In D365FS records are displayed in list queues, for example, Cases. When you as a call logger have captured the initial case details, it is moved in the BPF through different stages to other roles, for example, Technical Vetting. A member of the Technical Vetting team would view the Case in their Tech Vetting queue and assign it to themselves so that they can work on it. However, because any of the different roles can Assign a Case or Work Order to another role, this process applies to every user in D365FS. To assign a case record to yourself: In the Case view (Active Cases in this example), select the record you wish to amend by tagging the record in the Select column. A tick is displayed, and the record is highlighted in blue. **Owner**: this is currently set to, for example, Technical Vetting. In the Menu bar, select **Assig**n. The Assign to Team or User box is displayed. **Assign To**: this defaults to Me. Select **Assign**. You can assign a record to another user or a team, depending on your role and security access. The record will be displayed in the user or team's queue. **Note**: when you assign a case record to yourself, your name will be displayed in the Owner field.

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CASE - Create: Not Chargeable

Create a CASE ****** MUST HAVE AN ASSET ****** **IMPORTANT**: use Script **004**

Select **+ NEW CASE** from the Menu bar. The Case – New Case form is displayed.

In the CASE DETAILS section of the **Summary** tab, enter the required information.

Field Name	Value	Information
Customer	**ABC Ltd**	Select the Customer from the list of Customers
Customer Asset	**A001-001**	If the asset serial number is known, enter it in this field

Mandatory fields which require information are identified with a red asterisk, the system will remind you that these fields require information.

Service Offering	**ABC-HW-Fix**	Select the Service Offering the Customer has chosen.
Service Type	**ABC001**	This field will auto populate when the Service offering has been selected.
Service Type	**Hardware Fix**	This field will auto populate when the Service offering has been selected.
Site	**Blackpool**	Select the Site.
Entitlement	**09:30-17:00**	Select the Entitlement.
Priority	**P2**	This will automatically populate when you enter the Customer Asset.
Product	**Asus Laptop**	This field will automatically populate when you enter the Customer Asset.
Contracted To		This field will be displayed as the Asset could belong to a Sub-Contractor.
Chargeable	**NO**	This field defaults to **No**. When the Case record is passed to TST, or to Contract Admin, they will determine whether the case is chargeable.
Contact	**S Jones**	Select the main contact for the site.
Fault Type	**Power Failure**	Select the type of fault, for example, **Hardware failure**.
First Time Fix	**No**	This defaults to **No**.
Currency	**GBP**	This populates automatically.

In the DESCRIPTION section of the **Summary** tab, enter a relevant description of the case.

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Objectives review	Let’s review the objectives that we set at the beginning of the course: ✓ Understand their role in relation to AFS ✓ Access and navigate key entities for their role ✓ Create and manage Cases, Assets, Accounts and Contacts ✓ View and edit Case details, and Contact details
Feedback	A feedback sheet will be issued to you at the end of the course.