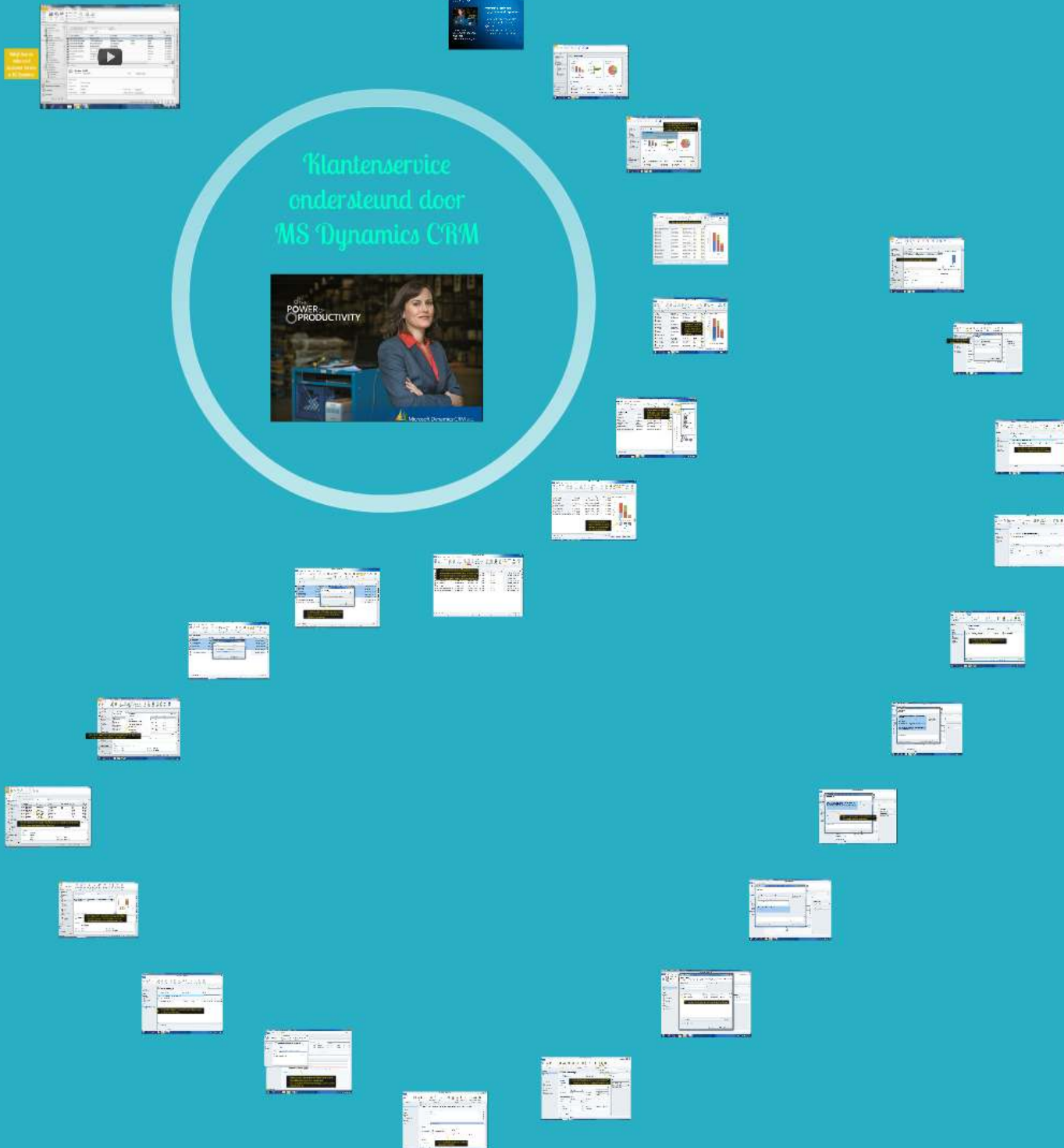
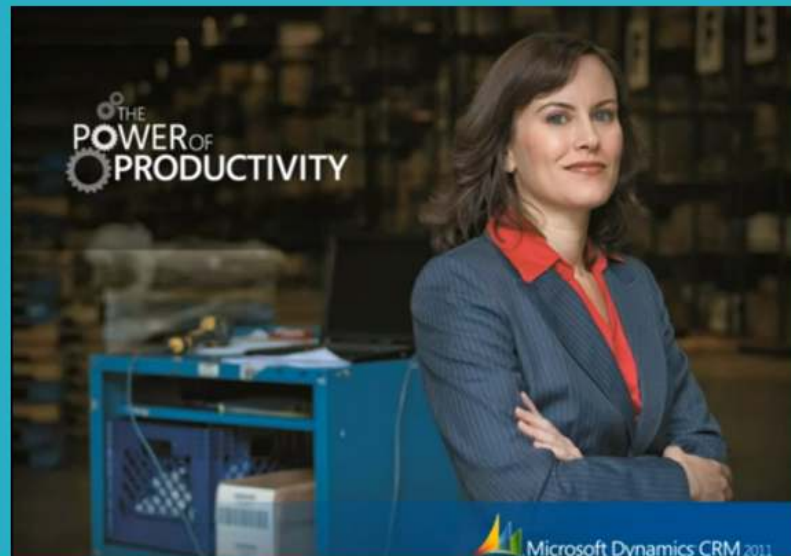


Klantenservice ondersteund door MS Dynamics CRM



Klantenservice ondersteund door MS Dynamics CRM



Scenario



Lisa Andrews
Customer Experience
Manager
Adventure Works, Inc.

Optimizing Customer Engagement and Experience

- Track Call Center Statistics
- Manage Caseloads with Queues
- Deliver Consistent Dialogs
- Track Follow-Up Activities

File

Dashboards

Save As

New

Edit

Delete

Set As Default

Share Dashboard

Assign

Refresh All

Advanced Find

Help

Dashboard Management

Action

Query

Help

VirtualLaunchBDM

Marketing

Resource Center

Sales

Service

Settings

Workplace

My Work

Dashboards

Activities

Imports

Duplicate Detection

Queues

Articles

Reports

Announcements

Customers

Mail

VirtualLaunchBDM

Calendar

Contacts

Done

All folders are up to date.

100%

Dashboard: Service Dashboard

Active Case Analytics

Cases By Priority (Per...)

Active Cases

Owner	High	Normal	Low
Varun K	10	8	0
Lisa A	2	4	1

Resolved Case Satisfaction

All Cases

Satisfaction	Count
Very Satisfied	3
Satisfied	30
Neutral	21
Dissatisfied	3
Very Dissatisfied	3

Case Mix (By Type)

Active Cases

Type	Count
Question	6
Problem	25
Other	11

Active Case Details

Cases: Active Cases

Title	Case Number	Customer	Priority	Owner
AX305 damaged during shipment	CAS-01001-LJDSKF	Advanced Sales Component	Low	Craig D
Broken AX305	Ticket15	Litware Inc.	Normal	Craig D
Broken AX305	CAS-01034-GX0618	Eleventh Sales Store	High	Varun
Broken AX305	CAS-01013-J0W1RI	World Sales Discount Store	Normal	Varun

11:30 AM: CRM Online Demo & Discussion

Today: 1 Tasks

Prezi



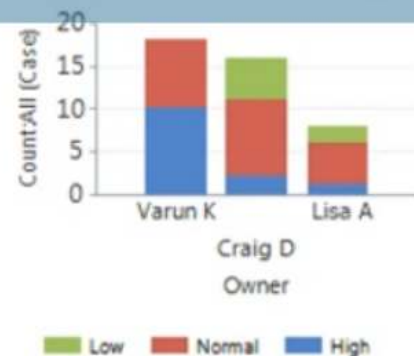
- Op het Service Dashboard is ondermeer te zien dat Varun een groot aantal 'high priority' cases heeft.
- Lisa Andrews wil dit verder onderzoeken en vraagt een detail (onderliggende records) op van de grafiek.

Dashboard: **Service Dashboard**

▼ Active Case Analytics

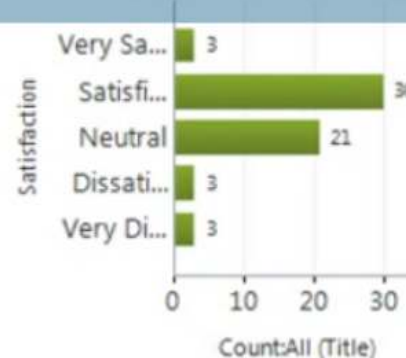
Cases By Priority (Per...)

Active Cases



Resolved Case Satisfaction

View the records that are used to generate the chart



Case Mix (By Type)

Active Cases



▼ Active Case Details

Cases: **Active Cases**

Search for records

☐	Title ▲	Case Number	Customer	Priority	Owner
☐	AX305 damaged during shipment	CAS-01001-LJDSKF	Advanced Sales Component	Low	Craig D
☐	Broken AX305	Ticket15	Litware Inc.	Normal	Craig D
☐	Broken AX305	CAS-01034-GX0618	Eleventh Sales Store	High	Varun
☐	Broken AX305	CAS-01013-J0W1RI	World Sales Discount Store	Normal	Varun

File Cases View Charts Add Customize

Records Actions Data Help

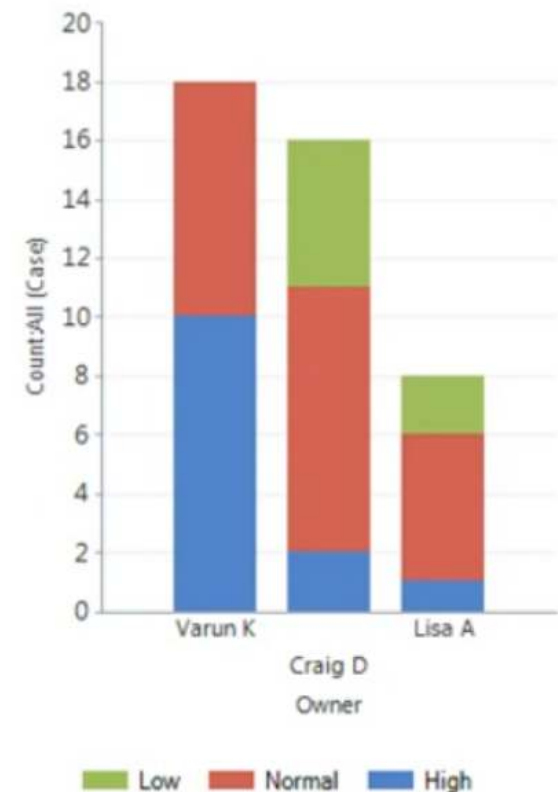
New Edit Delete Resolve Case Cancel Case Send Direct Email Connect Add to Queue Assign Share Copy a Link Run Workflow Start Dialog Run Report Import Data Export to Excel Filter Advanced Find Help

• Lisa krijgt nu een detail van de actieve cases te zien.

Cases: Active Cases

	Title	Case Number	Customer	Priority	Owner
	AX305 damaged during shipment	CAS-01001-LJDSKF	Advanced Sales Component	Low	Craig D
	Broken AX305	Ticket15	Liveware Inc.	Normal	Craig D
	Broken AX305	CAS-01034-GX06IB	Eleventh Sales Store	High	Varun K
	Broken AX305	CAS-01013-J0W1RI	World Sales Discount Store	Normal	Varun K
	Broken JJ202	Ticket13	Weekend Tours	Normal	Craig D
	Broken JJ202	CAS-01004-VIFBYA	Marketings and Scooters	Low	Craig D
	Broken JJ202	CAS-01030-V2LDON	Recreation Supplies	High	Craig D
	Broken JJ202	CAS-01021-6K0TQT	Sean Chai	Normal	Lisa A
	Broken JJ202	CAS-01003-9ND2YK	Curbside Sporting Goods	High	Varun K
	Broken JJ202	CAS-01031-UM0TFX	Recreation Supplies	Low	Craig D
	Broken JJ202	Ticket19	Vast Sales Sales and Rental	High	Varun K
	Broken JJ202	CAS-01002-ZH3H43	Affordable Sports Equipmei	High	Varun K
	Broken JJ202	CAS-01022-2NWPGC	Ben Miller	Normal	Lisa A
	Contact information	Ticket20	Vast Sales Sales and Rental	High	Varun K
	Contact information	Ticket23	Metropolitan Sports Supply	Normal	Craig D
	JJ202 damaged	CAS-01014-4PYQTT	Fifth Sales Store	Normal	Craig D
	JJ202 damaged	CAS-01033-3QJU47	Eleventh Sales Store	High	Varun K
	JJ202 malfunction	CAS-01008-AUYQMA	Michael Ruggiero	High	Lisa A
	JJ202 malfunction	CAS-01018-6LNDQQ	Best o' Sales	High	Craig D
	JJ202 malfunction	CAS-01032-L81VJ6	Eleventh Sales Store	High	Varun K
	Kit missing AX305	CAS-01038-RIFAQO	Eleventh Sales Store	High	Varun K

Cases By Priority (Per Owner)



Click on the chart to perform Drill Down

1 - 42 of 42 (0 selected)

Page 1

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

File Cases View Charts Add Customize

New Edit Delete Resolve Case Cancel Case Send Direct E-mail Connect Add to Queue Assign Share Copy a Link E-mail a Link Run Workflow Start Dialog Run Report Import Data Export to Excel Filter Advanced Find Help

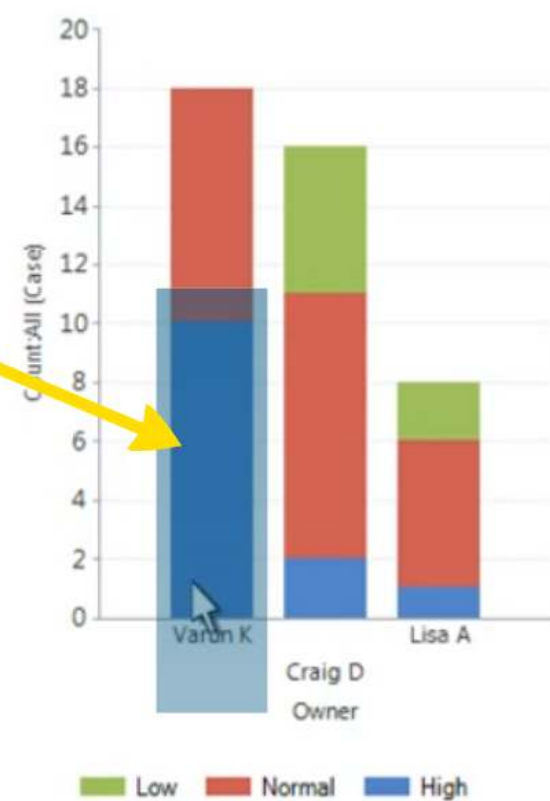
Records Actions Collaborate Process Data Help

Cases: **Active Cases**

Title	Case Number	Customer	Priority	Owner
AX305 damaged during shipment	CAS-01001-LJDSKF	Advanced Sales Component	Low	Craig D
Broken AX305	Ticket15	Litware Inc.	Normal	Craig D
Broken AX305	CAS-01034-GX06JB	Eleventh Sales Store	High	Varun K
Broken AX305	CAS-01013-J0W1RI	World Sales Discount Store	Normal	Varun K
Broken JJ202	Ticket13	Weekend Tours	Normal	Craig D
Broken JJ202	CAS-01004-VIFBYA	Marketing and Scooters	Low	Craig D
Broken JJ202	CAS-01030-V2LDON	Recreation	Normal	Craig D
Broken JJ202	CAS-01021-6K0TQT	Sean's	High	Lisa A
Broken JJ202	CAS-01003-9ND2YK	Curious Shopping Goods	High	Varun K
Broken JJ202	CAS-01031-UM0TFX	Recreation	Normal	Craig D
Broken JJ202	Ticket19	Vast Sales and Rental	High	Varun K
Broken JJ202	CAS-01002-ZH3H43	Affordable Sports Equipment	High	Varun K
Broken JJ202	CAS-01022-2NWPGC	Ben's	Normal	Lisa A
Contact information	Ticket20	Vast Sales Sales and Rental	High	Varun K
Contact information	Ticket23	Metropolitan Sports Supply	Normal	Craig D
JJ202 damaged	CAS-01014-4PYQTT	Fifth Sales Store	Normal	Craig D
JJ202 damaged	CAS-01033-3QJU47	Eleventh Sales Store	High	Varun K
JJ202 malfunction	CAS-01008-AUYQMA	Michael Ruggiero	High	Lisa A
JJ202 malfunction	CAS-01018-6LNDQQ	Best o' Sales	High	Craig D
JJ202 malfunction	CAS-01032-L81VJ6	Eleventh Sales Store	High	Varun K
Kit missing AX305	CAS-01038-RIFAOO	Eleventh Sales Store	High	Varun K

• Vervolgens wil Lisa de 'high priority' cases van Varun uitlichten. Ze klikt daartoe het blauwe gedeelte van de grafiek aan.

Cases By Priority (Per Owner)



Click on the chart to perform Drill Down

File Cases View Charts Add Customize

New Edit Delete Resolve Case Cancel Case Send Direct E-mail Connect Add to Queue Assign Copy a Link E-mail a Link Run Workflow Start Dialog Run Report Import Data Export to Excel

Records Actions

Cases: Active Cases

Title	Case Number	Owner	Priority
Broken AX305	CAS-01034-GX0618	Varun K	High
Broken JJ202	CAS-01003-9ND2YK	Varun K	High
Broken JJ202	Ticket19	Varun K	High
Broken JJ202	CAS-01002-ZH3H43	Varun K	High
Contact information	Ticket20	Varun K	High
JJ202 damaged	CAS-01033-3QJU47	Varun K	High
JJ202 malfunction	CAS-01032-L81VJ6	Varun K	High
Kit missing AX305	CAS-01038-PIFAOO	Varun K	High
Renewal of the Service contract for ...	CAS-01015-98F0F2	Varun K	High
When is new version being released?	CAS-01012-LC8VKT	Varun K	High

• Om een overzicht te krijgen van de tijdstippen waarop de cases gecreëerd zijn, klikt Lisa op de parameter 'created on'.

Select Field

- Title
- Case Number
- Customer
- Created On
- Primary E-mail (Owning User)
- Created On
- Actual Service Units
- Billed Service Units
- Case
- Case Category
- Case Origin
- Case Stage
- Case Type
- Contract
- Contract Line
- Created By
- Created By (Delegate)
- Currency
- Decrementing
- Exchange Rate
- Follow Up By
- Import Sequence Number
- Modified By
- Modified By (Delegate)
- Modified On
- Product
- Record Created On
- Responsible Contact

Cases By Priority

Count All (Case)

Varun K Craig D Lisa A

Owner

Low Normal High

File Cases View Charts Add Customize

New Edit Delete

Records Actions Collaborate Process Data

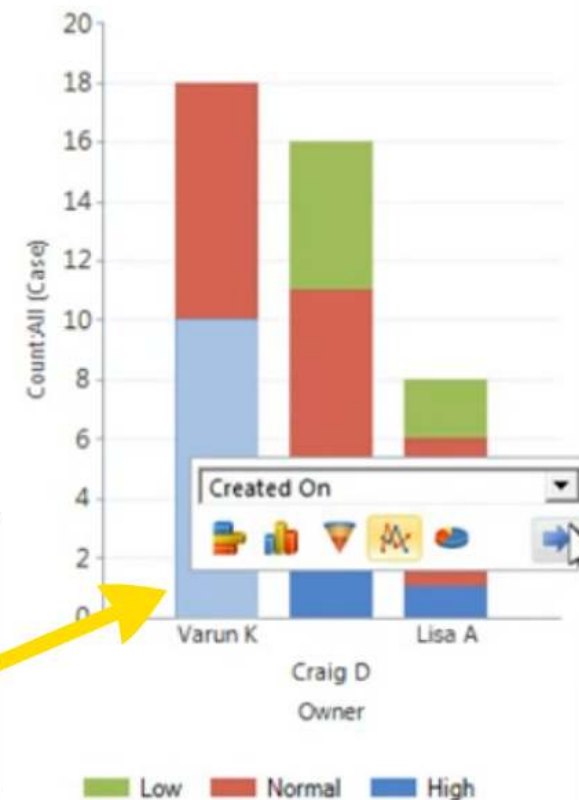
Resolve Case Cancel Case Send Direct E-mail Connect Add to Queue Assign Share Copy a Link E-mail a Link Run Workflow Start Dialog Run Report Import Data Export to Excel Filter Advanced Find Help

Cases: Active Cases

Title	Case Number	Customer	Priority	Owner
Broken AX305	CAS-01034-GX06I8	Eleventh Sales Store	High	Varun K
Broken JJ202	CAS-01003-9ND2YK	Curbside Sporting Goods	High	Varun K
Broken JJ202	Ticket19	Vast Sales Sales and Rental	High	Varun K
Broken JJ202	CAS-01002-ZH3H43	Affordable Sports Equipmei	High	Varun K
Contact information	Ticket20	Vast Sales Sales and Rental	High	Varun K
JJ202 damaged	CAS-01033-3QJU47	Eleventh Sales Store	High	Varun K
JJ202 malfunction	CAS-01032-L81VJ6	Eleventh Sales Store	High	Varun K
Kit missing AX305	CAS-01038-PIFAOO	Eleventh Sales Store	High	Varun K
Renewal of the Service contract for ...	CAS-01015-98F0F2	World Sales Discount Store	High	Varun K
When is new version being released?	CAS-01012-LC8VKT	World Sales Discount Store	High	Varun K

Search for records

Cases By Priority (Per Owner)



- Lisa kiest voor een 'grafiek op maat' met een overzicht van de 'high priority' cases van Varun over de tijd heen gespreid.

File Cases View Charts Add Customize

New Edit Delete

Resolve Case Cancel Case Send Direct E-mail Connect Add to Queue Assign Share Copy a Link E-mail a Link Run Workflow Start Dialog Run Report Import Data Filter Export to Excel Advanced Find Help

Records Actions Collaborate Process Data Help

- Lisa zal het overzicht van de meest prioritaire cases van Varun opslaan in een bestaande 'Queue' of wachtlijst. Op deze manier kunnen de cases toegewezen worden aan de call center agents. Hierdoor zal Varun ontlast worden.

Cases: Active Cases				Search for records		
Title	Case ID	Organization	Priority	Owner	Created On	
Broken JJ202	CAS-01032-L81VJ6	Eleventh Sales Store	High	Varun K	9/6/2010 12:00 AM	vk...
Broken JJ202	CAS-01038-PIFAOO	Eleventh Sales Store	High	Varun K	9/22/2010 12:00 AM	vk...
Broken JJ202	CAS-01034-GX061B	Eleventh Sales Store	High	Varun K	9/30/2010 12:00 AM	vk...
Broken JJ202	CAS-01002-ZH3H43	Affordable Sports Equipmei	High	Varun K	10/4/2010 12:00 AM	vk...
JJ202 malfunction	CAS-01032-L81VJ6	Eleventh Sales Store	High	Varun K	10/4/2010 12:00 AM	vk...
Kit missing AX305	CAS-01038-PIFAOO	Eleventh Sales Store	High	Varun K	10/8/2010 12:00 AM	vk...
Broken AX305	CAS-01034-GX061B	Eleventh Sales Store	High	Varun K	10/12/2010 12:00 AM	vk...
Broken JJ202	CAS-01002-ZH3H43	Affordable Sports Equipmei	High	Varun K	10/16/2010 12:00 AM	vk...
Renewal of the Service contract for ...	CAS-01015-98F0F2	World Sales Discount Store	High	Varun K	10/24/2010 12:00 AM	vk...
When is new version being released?	CAS-01012-LC8VKT	World Sales Discount Store	High	Varun K	12/10/2010 2:48 PM	vk...

Click here to view the chart.

Microsoft Dynamics CRM

Lisa A VirtualLaunchBDM

File Cases View Charts Add Customize

New Edit Delete

Records

Resolve Case Cancel Case Send Direct E-mail Connect Add to Queue Assign Share Copy a Link E-mail a Link

Collaborate

Run Workflow Start Dialog Run Report Import Data Export to Excel Filter

Process Data

Advanced Find Help

Cases: Active Cases

Search for records

Title	Case Number	Customer	Priority	Owner	Created On	
☒ JJ202 damaged	CAS-01033-3QJU47	Eleventh Sales Store	High	Varun K	9/6/2010 12:00 AM	vk...
☒ Broken JJ202	Ticket19				9/22/2010 12:00 AM	vk...
☒ Contact information	Ticket20				9/30/2010 12:00 AM	vk...
☒ Broken JJ202	CAS-01003				10/4/2010 12:00 AM	vk...
☒ JJ202 malfunction	CAS-01032				10/4/2010 12:00 AM	vk...
☒ Kit missing AX305	CAS-01038				10/8/2010 12:00 AM	vk...
☒ Broken AX305	CAS-01034				10/12/2010 12:00 AM	vk...
☐ Broken JJ202	CAS-01002				10/16/2010 12:00 AM	vk...
☐ Renewal of the Service contract for ...	CAS-01015				10/24/2010 12:00 AM	vk...
☐ When is new version being released?	CAS-01012				12/10/2010 2:48 PM	vk...

1 - 10 of 10 (7 selected)

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Click here to view the chart.

Prezi

- Lisa Andrews selecteert de oudste cases tussen 6 sep 2010 en 12 okt 2010 en slaat ze op in de wachtrij 'High Priority Service Cases'.

File Cases View Charts Add Customize

Records Actions Collaborate Process Data Help

New Edit Delete Resolve Case Cancel Case Send Direct E-mail Connect Add to Queue Assign Copy a Link E-mail a Link Run Workflow Start Dialog Run Report Import Data Export to Excel Filter Advanced Find Help

Cases: Active Cases

Search for records

	Title	Case Number	Customer	Priority	Owner	Created On	
☒	JJ202 damaged	CAS-01033-3OJU47	Eleventh Sales Store	High	Varun K	9/6/2010 12:00 AM	vk...
☒	Broken JJ202	Ticket19				9/22/2010 12:00 AM	vk...
☒	Contact information	Ticket20				9/30/2010 12:00 AM	vk...
☒	Broken JJ202	CAS-01003				10/4/2010 12:00 AM	vk...
☒	JJ202 malfunction	CAS-01032				10/4/2010 12:00 AM	vk...
☒	Kit missing AX305	CAS-01038				10/8/2010 12:00 AM	vk...
☒	Broken AX305	CAS-01034				10/12/2010 12:00 AM	vk...
☐	Broken JJ202	CAS-01002				10/16/2010 12:00 AM	vk...
☐	Renewal of the Service contract for ...	CAS-01015				10/24/2010 12:00 AM	vk...
☐	When is new version being released?	CAS-01012				12/10/2010 2:48 PM	vk...

Add to Queue

You have selected 7 items. To which queue would you like to add them?

Add the selected items to the following queue:

[High Priority Service Cases](#)

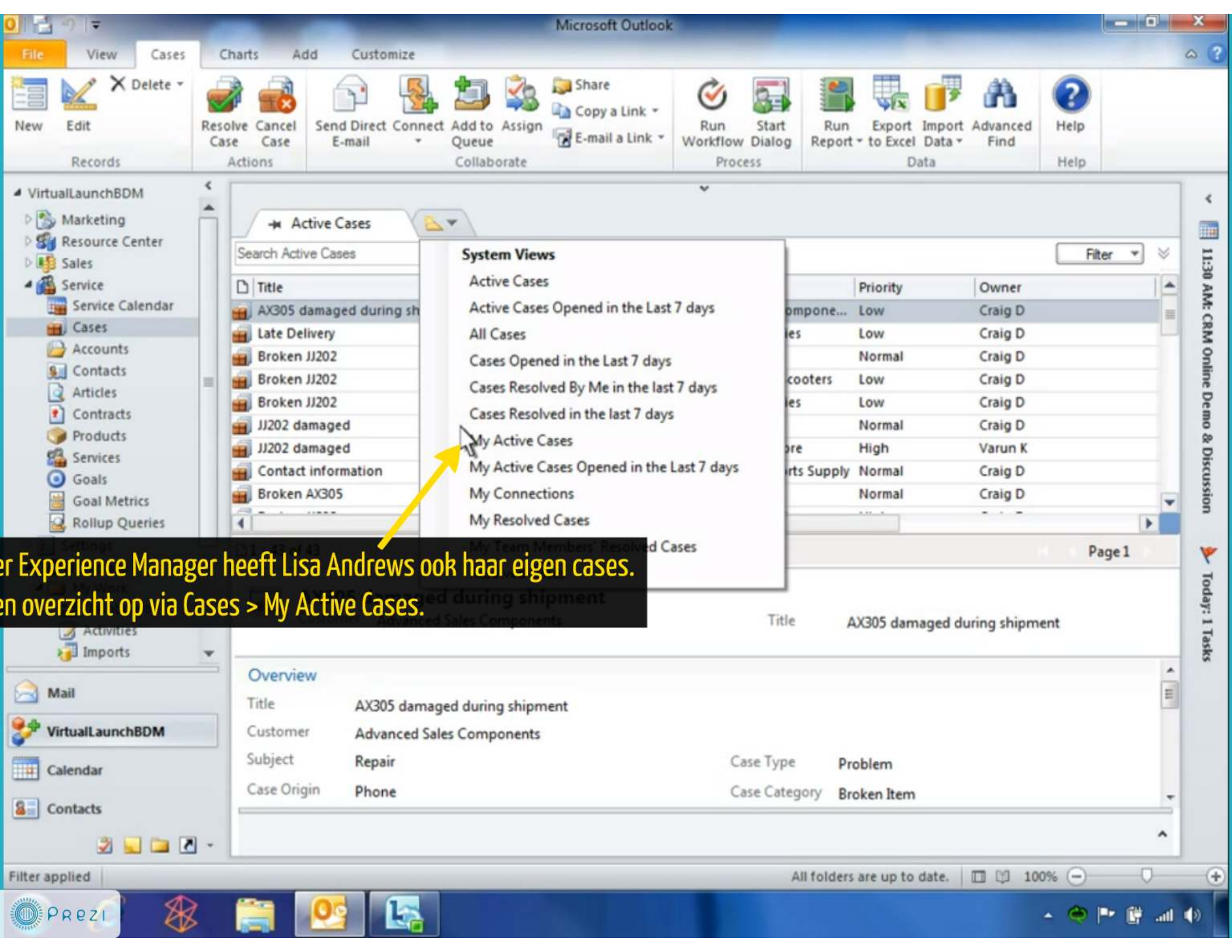
Help OK Cancel

Click here to view the chart.

1 - 10 of 10 (7 selected)

Page 1

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z



er Experience Manager heeft Lisa Andrews ook haar eigen cases.
en overzicht op via Cases > My Active Cases.

File View Cases Charts Add Customize

Chart Pane
New Chart Save As Edit Chart Import Chart Export Chart Refresh Chart Assign Share
Charts Collaborate

Right
Top
Off

Resource Center
Sales
Service
Service Calendar
Cases
Accounts
Contacts
Articles
Contracts
Products
Services
Goals
Goal Metrics
Rollup Queries
Settings
Workplace
My Work
Dashboards
Activities
Imports
Mail
VirtualLaunchBDM
Calendar
Contacts

Active Cases My Active Cases

Search My Active Cases

Case Number	Title	Customer	Customer Category (C...	Priority	Created C
CAS-01021-6K0TQT	Broken JJ202	Sean Chai		Normal	Sun 9/26/
CAS-01008-AUYQMA	JJ202 malfunction	Michael Ruggiero	Gold	High	Sun 9/26/
CAS-01028-T4ZQRI	Broken Product	Jan Stoklasa	Gold	High	Thu 10/28
CAS-01022-2NWPGC	Broken JJ202	Ben Miller		Normal	Thu 10/28
CAS-01020-7JLFR4	Kit missing AX305	Parul Shah		Normal	Fri 12/10/
CAS-01009-A1NF3W	Kit missing AX305	Maria Hammond		Normal	Fri 12/10/
Ticket22	Kit Missing JJ202	Tosh Meston		Normal	Fri 12/10/
CAS-01010-302ARB	Late Delivery	Ryan Ihrig		Low	Fri 12/10/
Ticket26	Product FAQ Document	Nino Olivotto		Low	Fri 12/10/

Page 1

Overview

Title Broken JJ202
Customer Sean Chai
Subject Repair
Case Origin E-mail
Case Type Request
Case Category Broken Item

- Lisa ziet in haar overzicht cases die reeds 'over tijd' zijn. (zie vet gedrukte case nummers)
- Ze wil een meer visueel overzicht via de 'Chart Pane'.

Filter applied All folders are up to date. 100%

File View Cases Charts Add Customize

View Settings Add Columns Expand/Collapse Arrangement Navigation Pane Reading Pane To-Do Bar Reminders Open in New Window Close All Items Customize Reading Pane Save Filters Save As New Personal View Refresh

VirtualLaunchBDM

- Marketing
- Resource Center
- Sales
- Service
 - Service Calendar
 - Cases
 - Accounts
 - Contacts
 - Articles
 - Contracts
 - Products
 - Services
 - Goals
 - Goal Metrics
 - Rollup Queries
- Settings
- Workplace
 - My Work
 - Dashboards
 - Activities
 - Imports
- Mail

VirtualLaunchBDM

Calendar

Contacts

11:30 AM: CRM Online Demo & Discussion

Today: 1 Tasks

Active Cases My Active Cases

Search My Active Cases Filter

Case Number	Title	Customer	Customer Ca
CAS-01008-AUYQMA	JJ202 malfunction	Michael Ruggiero	Gold
CAS-01028-T4ZQRI	Broken Product	Jan Stoklasa	Gold

Cases By Priority (Per Owner)

Count: All (Case)

Select Field

Low Normal High

1 - 2 of 2

JJ202 malfunction

Customer Michael Ruggiero

Overview

Title JJ202 malfunction

Customer Michael Ruggiero

Subject Repair

Case Origin Web

Case Type Problem

Case Category Broken Item

Filter applied

All folders are up to date.

100%

- Door opnieuw op het blauwe gedeelte van de grafiek te klikken, krijgt Lisa de meest prioritair te behandelen cases te zien.
- Ze besluit prioriteit te geven aan de 'Broken Product' case.



Information

General
Notes and Article

Related

Common

Activities
Closed Activities
Connections
Documents
Audit History

Processes

Workflows
Dialog Sessions

Case
CAS-01028-T4ZQRI

Cases

Customer

Jan Stoklasa

Title

Broken Product

Owner

Lisa A

Workflows: **System Job Associated View**

More Actions

☐	System Job Name	Status Reason	Owner	Started On	Completed On
☐	Broken Item Case Routing	Succeeded	Lisa A	12/22/2010 9:54 AM	12/22/2010 9:54 AM

- Om de 'Broken Product' case procesmatig op te kunnen volgen kiest Lisa voor > Workflows.

1 - 1 of 1 (0 selected)

Page 1

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Status **Active**

File Close Actions Help

Microsoft Dynamics CRM

VirtualLaunchBD

E-mail Customize

Save & New Save Save & Close Delete

To Case To Opportunity To Lead Convert Activity

Connect Add to Queue Queue Item Details Collaborate

Sharing Copy a Link E-mail a Link

Run Workflow Start Dialog Run Report

E-mail

Service Case: CAS-01028-T4ZQRI has been received and is under investig...

Activities

E-mail

From: Lisa A

To: Jan Stoklasa

Cc:

Bcc:

Subject: Service Case: CAS-01028-T4ZQRI has been received and is under investigation CRM:0001070

Regarding: Broken Product

Dear Jan,

Thank you for registering your service case details with us. We apologize for any inconvenience caused and will work to resolve your Broken Item Problem as quickly as possible.

Please contact us if you have any question! We anticipate resolving this case for you within 2 working days.

Kind regards,

The Service Team

Status Reason Sent

Type: Workflow

Created On: 12/22/2010 9:54 AM

Completed On: 12/22/2010 9:54 AM

Postpone until:

Send a confirmation email to the customer

Create: E-mail: Service Case: CAS-01028-T4ZQRI has been received and is under investigation View properties

Details

- Doordat de case is opgenomen in de 'Broken Item Queue' is het behandelingsproces van de klacht in gang gezet.
- Een bevestigingsmail (klacht goed ontvangen) werd reeds naar de klant gestuurd.

Status: Succeeded

Prezi

File E-mail Customize

Respond: Reply, Reply all, Forward

Save: Save, Save & Close, Save & New, Delete

Convert Activity: To Opportunity, To Case, Promote to Response, To Lead

Collaborate: Connect, Add to Queue, Queue Item Details, Sharing, Copy a Link, E-mail a Link

Process: Run Workflow, Start Dialog

Data: Run Report

Information

- E-mail
- Attachments
- Details

Related

Common

- Connections
- Audit History

Processes

- Workflows
- Dialog Sessions

E-mail

Activities

Service Case:CAS-01028-T4ZQRI has been received and is under investig...

▼ E-mail

From: Lisa A

To: Jan Stoklasa

Cc:

Bcc:

Subject: Service Case:CAS-01028-T4ZQRI has been received and is under investigation CRM:0001070

Regarding: Broken Product

Dear Jan,

Thank you for registering your service case details with us. We apologize for any inconvenience caused and will work to resolve your Broken Item Problem as quickly as possible.

Please contact us if you have any questions! We anticipate resolving this case for you within 2 working days.

Kind regards,

The Service Team

Status Reason Sent

- Lisa vindt de bevestigingsmail terug door de processtap aan te klikken.

File Case Add Customize

Save Save & Close Delete Save & New

Resolve Case Cancel Case Connect Add to Queue Queue Item Details Assign Sharing Copy a Link E-mail a Link Run Workflow Start Dialog Run Report

Save Actions Collaborate Process Data

Information

General Notes and Article

Related

Common

Activities Closed Activities Connections Documents Audit History

Processes

Workflows Dialog Sessions

Case CAS-01028-T4ZQRI

Customer Jan Stoklasa Title Broken Product Owner Lisa A

Start Dialog
Start a dialog for this Case.

Form Assistant
Form Assistant Help
Form Assistant Help
Select a lookup field.

General Overview

Title * Broken Product

Customer * Jan Stoklasa

Subject Repair

Case Type Problem

Case Origin E-mail

Case Category Broken Item

Satisfaction Neutral

Assignment Information

Owner * Lisa A

Status Reason In Progress

Follow Up By

Priority High

Contract and Product Information

Contract

Product Product B (SKU)

Contract Line

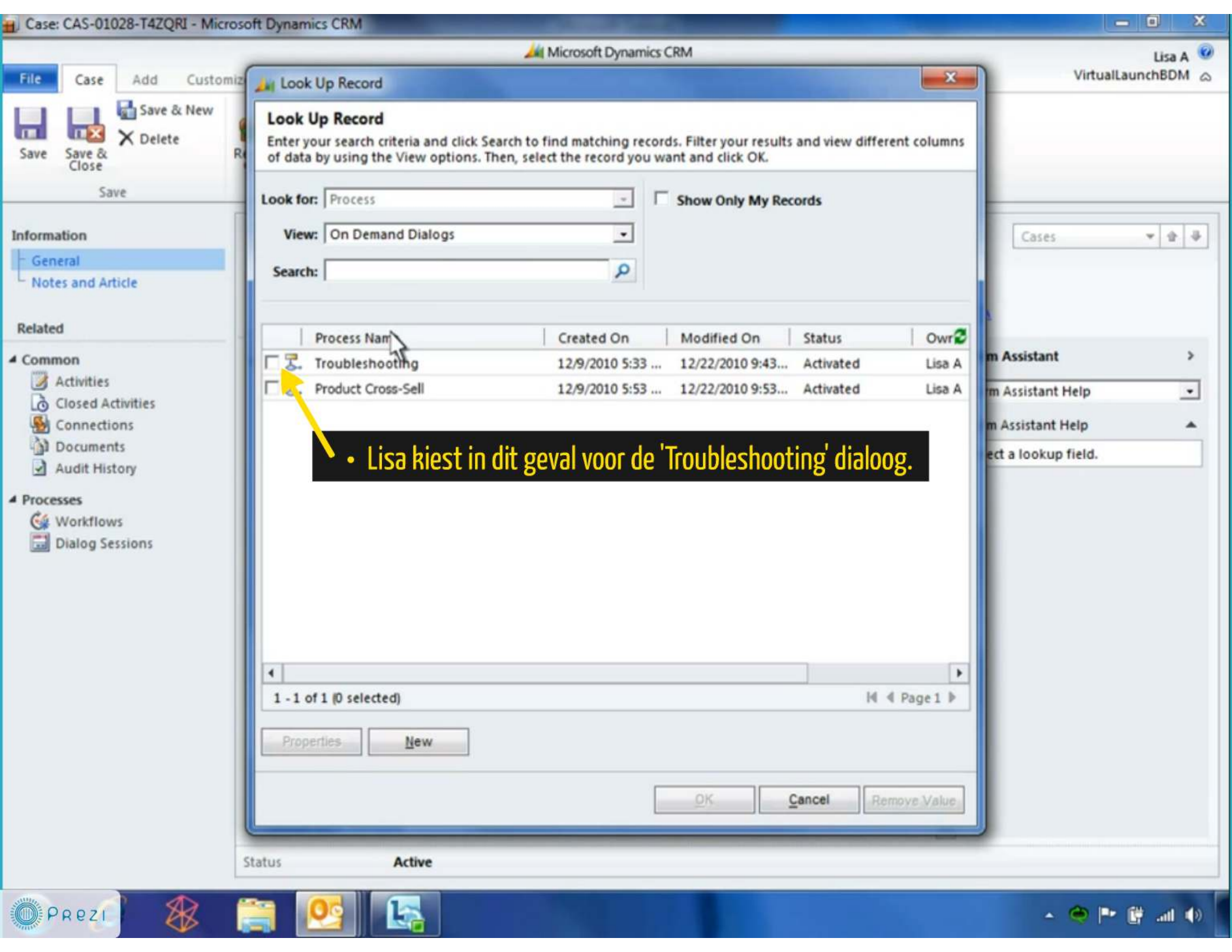
Serial Number

Service Level Gold

Notes and Article

Status Active

- Om de klacht professioneel op te volgen start Lisa Andrews een Dialoog. (= voorgeprogrammeerd script)



File Case Add Customize

Save Save Close

Information

General

Notes and Attachments

Related

Common

Activities

Close

Connections

Documents

Audit

Processes

Workflows

Dialogs



Run Report

Data

Cases

Owner

Lisa A

Form Assistant

Form Assistant Help

Form Assistant Help

Select a lookup field.

KU

Serial Number

Contract Line

Service Level

Gold

Notes and Article

Status

Active

File Case Add Customize

Save Save Close

Information

General Notes and Attachments

Related

Common

Activities Close Connections Documents Audits

Processes

Workflows Dialogs

Troubleshooting

\$50 Gift Certificate

Jan, as a very valued customer we'd like to convey our sincere apologies for the broken item you have received. We are therefore sending you a \$50 gift voucher which you can spend at one of our stores or online. We hope that this shows how important you are to us as a valued customer. You will receive the voucher in the mail in the next few days!

Tip

Make sure we explain how we value their business!

Can I confirm your address as follows:
1234 1st Street
Issaquah, WA
78350

Is this correct?

☒ Yes
☐ No

Click to add comments

Help Summary Previous **Next** Cancel

Contract Line Serial Number

Service Level Gold

Notes and Article

Status Active

- Het script laat toe om heel vlot door het proces te gaan. Alle benodigde informatie is voor handen.

File Case Add Customize

Save Save Close

Information

General Notes and

Related

Common

Activities Close Connections Documents Audits

Processes

Workflows Dialogs

Run Report Data

Cases

Owner

Lisa A

Form Assistant

Form Assistant Help

Form Assistant Help

Select a lookup field.

KU

Troubleshooting

Replacement

I am sending you an email with all the details on how the replacement process works.

Essentially, you will need to send the damaged goods to the following address:

1234 Orange Grove Way
Seattle, WA, 98104

We will need your proof of purchase receipt. The replacement AX305 will be sent to you within 2-4 working days.

Again, apologies for the inconvenience caused.

Thank you for your time today and please contact us again if there are any problems with your Replacement request

Tip

After explaining these steps an email will be sent to Jan which outlines all the details of the process.

Click to add comments

Help

Summary

Previous

Next

Cancel

Contract Line

Service Level

Gold

Serial Number

Notes and Article

Status

Active

Case: CAS-01028-T4ZQRI - Microsoft Dynamics CRM

FileCaseAddCustomizeActivities

Microsoft Dynamics CRM

Lisa AVirtualLaunchBDM

Add New ActivityAdd Existing ActivityEditDelete ActivityBulk DeleteRecords

IncludeConnectAdd to QueueAssign ActivitiesShareCopy a LinkE-mail a LinkActionsCollaborate

FilterChart PaneRun WorkflowStart DialogRun ReportExport ActivitiesCurrent ViewViewProcessData

InformationGeneralNotes and Article

RelatedCommonClosed ActivitiesConnectionsDocumentsAudit HistoryProcessesWorkflowsDialog Sessions

CaseCAS-01028-T4ZQRI

CustomerJan StoklasaTitleBroken ProductOwnerLisa A

Subject	Activity Type	Activity Status	Regarding	Priority	Due Date
Product replacement - Next Steps CRM:00010...	E-mail	Completed	Broken Prodt	Normal	
Service Case: CAS-01028-T4ZQRI has been rec...	E-mail	Completed	Broken Prodt	Normal	

1 - 2 of 2 (0 selected)Page 1

StatusActive

Via 'Closed Activities' krijgt Lisa een pdf-versie van de verzuurde e-mail aan de klant.

File E-mail Customize

Respond: Reply, Reply all, Forward

Save: Save, Save & Close, Save & New, Delete

Convert Activity: To Opportunity, To Case, Promote to Response, To Lead

Collaborate: Connect, Add to Queue, Queue Item Details, Sharing, Copy a Link, E-mail a Link

Process: Run Workflow, Start Dialog

Data: Run Report

Information

- E-mail
- Attachments**
- Details

Related

Common

- Connections
- Audit History

Processes

- Workflows
- Dialog Sessions

E-mail

Product replacement - Next Steps CRM:0001072

Activities

Attachments

E-Mail Attachments: **Activity Attachment Associated View**

Search for records

☐	File Name	File Size (Bytes)
☐	Replace Product Form.pdf	83,412

1 - 1 of 1 (0 selected)

Page 1

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Details

Owner *	Lisa A	Priority	Normal
Duration		Category	
Due		Sub-Category	

Status Reason

Sent

File Case Add Customize **List Tools** Activities

Records: Add New Activity, Add Existing Activity, Edit

Actions: Delete Activity, Bulk Delete, Include

Collaborate: Connect, Add to Queue, Assign Activities, Share, Copy a Link, E-mail a Link

Current View: Filter

View: Chart Pane

Process: Run Workflow, Start Dialog

Data: Run Report, Export Activities

Information

General
Notes and Article

Related

Common

Activities
Closed Activities
Connections
Documents
Audit History

Processes

Workflows
Dialog Sessions

Case
CAS-01028-T4ZQRI

Customer

[Jan Stoklasa](#)

Title

Broken Product

Owner

[Lisa A](#)Activities: **Open Activity Associated View**

Search for records

☐	Subject	Activity Type	Activity Status	Priority	Due Date	Created
☐	Send \$50 Gift Voucher to Jan Stoklasa	Task	Open	High	10/31/2010 12:00 AM	Lisa A

Send \$50 Gift Voucher to Jan Stoklasa

- Via > 'Activities' ziet Lisa dat er nog een openstaande taak is. Van zodra afgewerkt zal ze deze taak uitvinken.

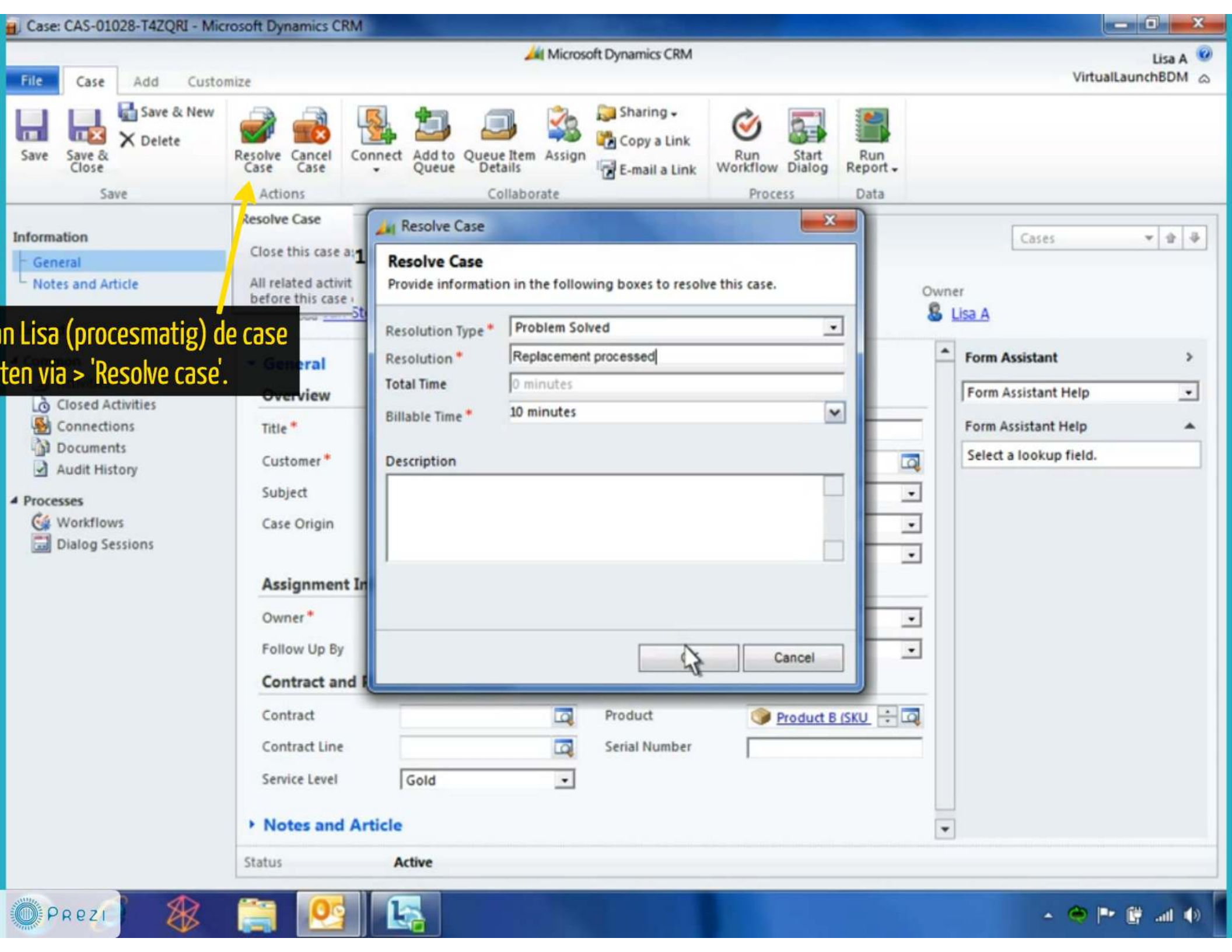
1 - 1 of 1 (0 selected)

Page 1

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Status

Active



FileViewCasesChartsAddCustomize

View Settings

Reverse Sort

Add Columns

Expand/Collapse

Current View

Arrangement

Navigation Pane

Reading Pane

To-Do Bar

Layout

Reminders Window

Open in New Window

Close All Items

Window

Customize Reading Pane

Save Filters

Save As

New Personal View

List

Refresh

View

VirtualLaunchBDM

Marketing

Resource Center

Sales

Service

Service Calendar

Cases

Accounts

Contacts

Articles

Contracts

Products

Services

Goals

Goal Metrics

Rollup Queries

Settings

Workplace

My Work

Dashboards

Activities

Imports

Mail

VirtualLaunchBDM

Calendar

Contacts

Active Cases

My Active Cases

Search My Active Cases

Filter

Case Number	Title	Customer	Customer Ca
CAS-01008-AUYQMA	JJ202 malfunction	Michael Ruggiero	Gold

1 - 1 of 1

Page 1

Cases By Priority (Per Owner)

Count/All (Case)

Lisa A Owner

High

JJ202 malfunction

Customer Michael Ruggiero

Title JJ202 malfunction

Overview

Title JJ202 malfunction

Customer Michael Ruggiero

Subject Repair

Case Origin Web

Case Type Problem

Case Category Broken Item

Filter applied

All folders are up to date.

100%

11:30 AM: CRM Online Demo & Discussion

Today: 2 Tasks

• Lisa Andrews gaat over naar de volgende 'high priority' case.

Scenario



Lisa Andrews
Customer Experience
Manager
Adventure Works, Inc.

Optimizing Customer Engagement and Experience

- Track Call Center Statistics
- Manage Caseloads with Queues
- Deliver Consistent Dialogs
- Track Follow-Up Activities

YouTube