



# Introducing Microsoft Dynamics 365 ♥ Customer Service

Microsoft Partner

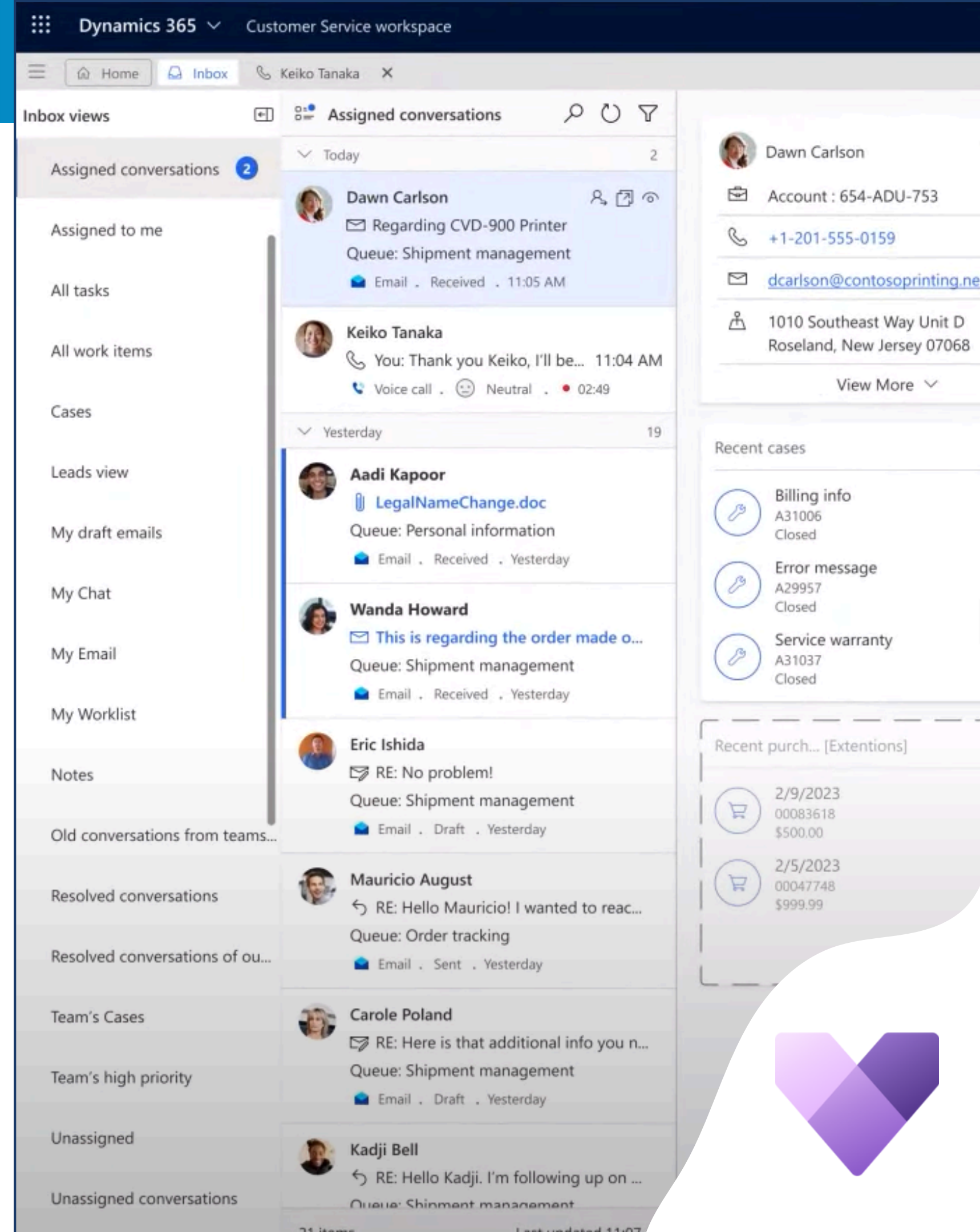
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# D365 Customer Service – Summary

- **Efficiently handle support requests** with case management, service agreements, routing, queues and other inbuilt functionality.
- Increase service efficiency by **connecting customer data** and **automating repeatable workflows**.
- **Resolve issues quicker** using Microsoft Copilot to find solutions using conversational chat.
- **Easily bring together experts** with native Microsoft Teams integration.
- **Enable self-service** that empowers customers to resolve issues in real-time.
- **Connect your teams**, including sales, marketing and other business apps, on the same platform.



# Connected Solutions

**Microsoft Dynamics 365 Customer Service is a quick-to-implement, easy-to-use solution that will adapt flexibly to your organisation and increase your scale and agility.**

For a fully unified solution, Dynamics 365 Customer Service connects with other Microsoft Business Apps to align service with sales, marketing and more teams.



## **Dynamics 365 Sales**

Enabling sellers to increase efficiency by minimising manual processes and unlocking data insights.



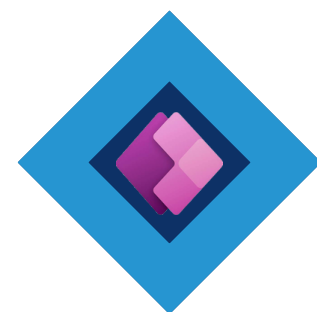
## **Dynamics 365 Customer Service**

Empowering teams to consistently deliver personalised service.



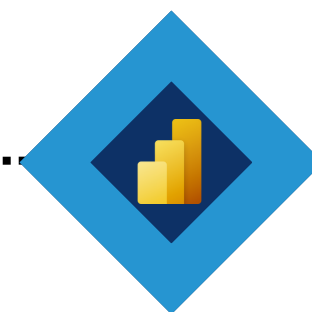
## **Dynamics 365 Customer Insights**

Engage customers with timely, personalised content delivered through the right channels.



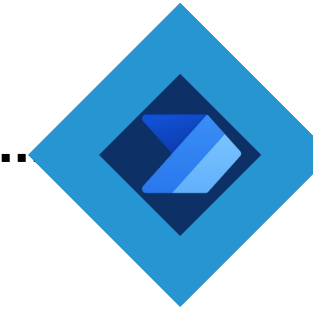
## **Power Apps**

Turn ideas into solutions with low-code custom apps that solve your business challenges.



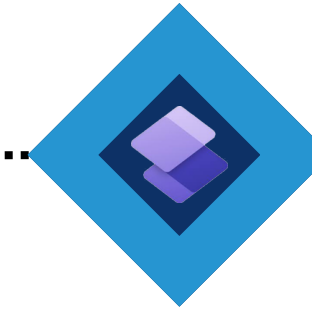
## **Power BI**

Visualise your data in new ways to uncover insights that will drive quicker, better-informed decisions.



## **Power Automate**

Streamline repetitive tasks with automated workflows that boost productivity.



## **Power Pages**

Quickly deploy process-driven portals delivering vital information and services to your customers.

# Personalised Service and Support

**Dynamics 365 Customer Service transforms support management, empowering teams to maintain service excellence.**

- Centralised case management streamlines resolution processes, ensuring consistency and compliance with your business's standards.
- Intelligent processes guide agents through tailored scenarios and adapt to the context of each case, promoting the right questions and data collection.
- Entitlements confirm that support is provided to eligible customers, and SLA controls ensure response times align with your service commitments.

The screenshot displays the Dynamics 365 Customer Service workspace. The top navigation bar includes the Dynamics 365 logo, the text 'Customer Service workspace', and a search bar. Below the navigation bar, there are tabs for 'Home' and 'Inbox'. The main content area is divided into two sections. On the left, a list of cases is shown, categorized by 'Today' (1 case) and 'Last week' (7 cases). Each case entry includes a wrench icon, a title, a case ID, the customer name, and status details. On the right, the details for the selected case 'Account review request' are displayed. This section includes a 'Details' tab, 'Attachments', and 'Related' links. Below these, there are 'SLA Timers' showing 'First response by 17h22m' and 'Resolve by Succeeded'. The 'Basic details' section lists various attributes: Activities (2 due today), Customer (Jessie Irwin), Title (Account review request), Type (Request), Account Type (Checkings), Account ID (78663229732487), Subject (General), Origin (Email), Entitlement (---), Escalated (Yes), and Escalated On (10/4/2023). The bottom right corner shows the time as 9:59 PM.

**Account review request** - Saved Case

Details Attachments Related

SLA Timers Last update: 10/5/2023 12:45 PM

First response by 17h22m Resolve by Succeeded

Basic details

Activities [2 due today](#)

Customer \* [Jessie Irwin](#)

Title \* Account review request

Type Request

Account Type [Checkings](#)

Account ID 78663229732487

Subject General

Origin Email

Entitlement ---

Escalated Yes

Escalated On 10/4/2023 9:59 PM

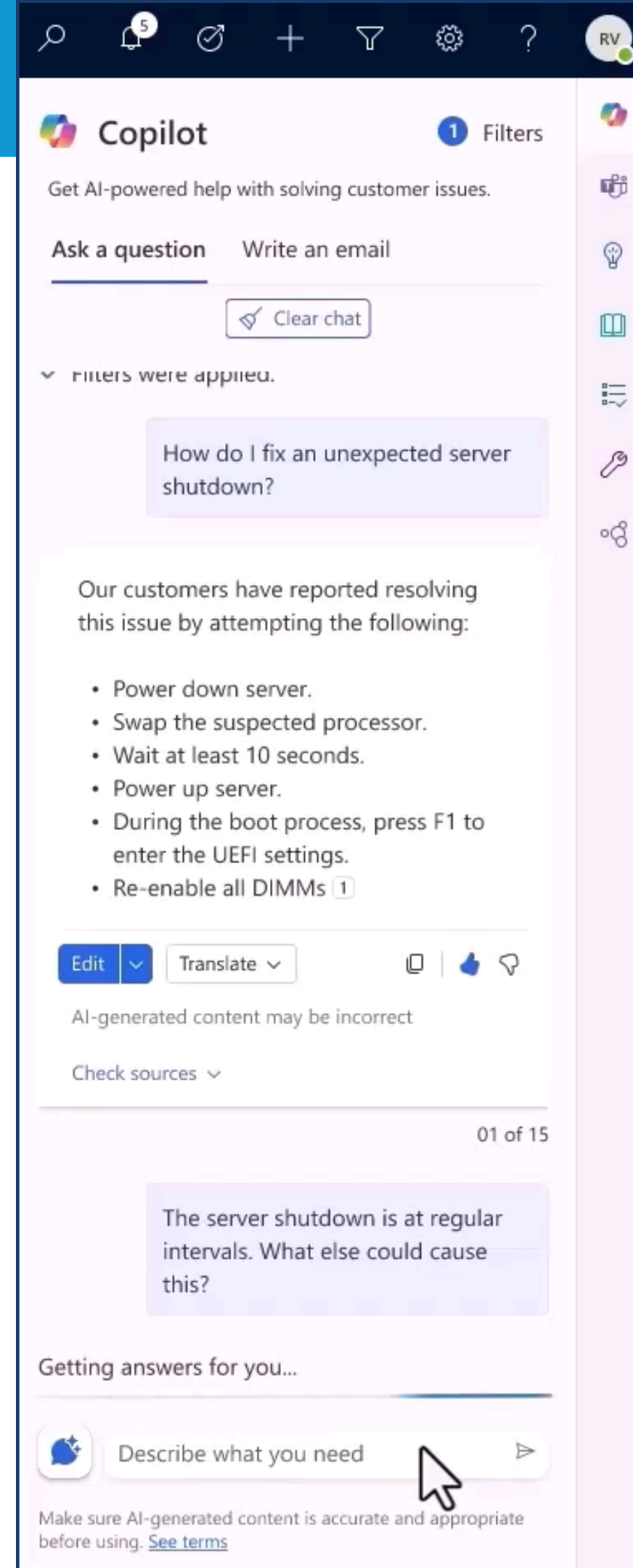
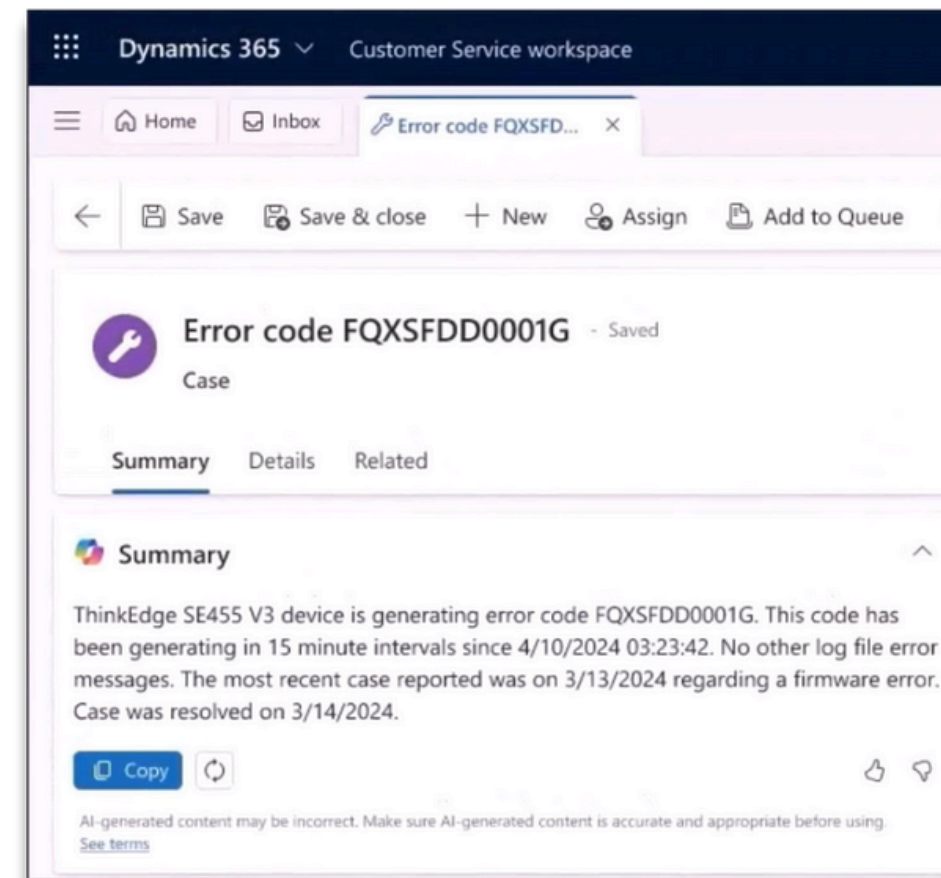


# Increased Agent Productivity

## Microsoft Copilot for Dynamics 365 transforms agent productivity by integrating generative AI into service experiences.

- Use embedded Copilot for Service to efficiently tap into your trusted knowledge resources using conversational chat to quickly find solutions.
- Copilot also simplifies drafting contextual emails and instantly provides coherent case summaries for a quick understanding of each reported issue.

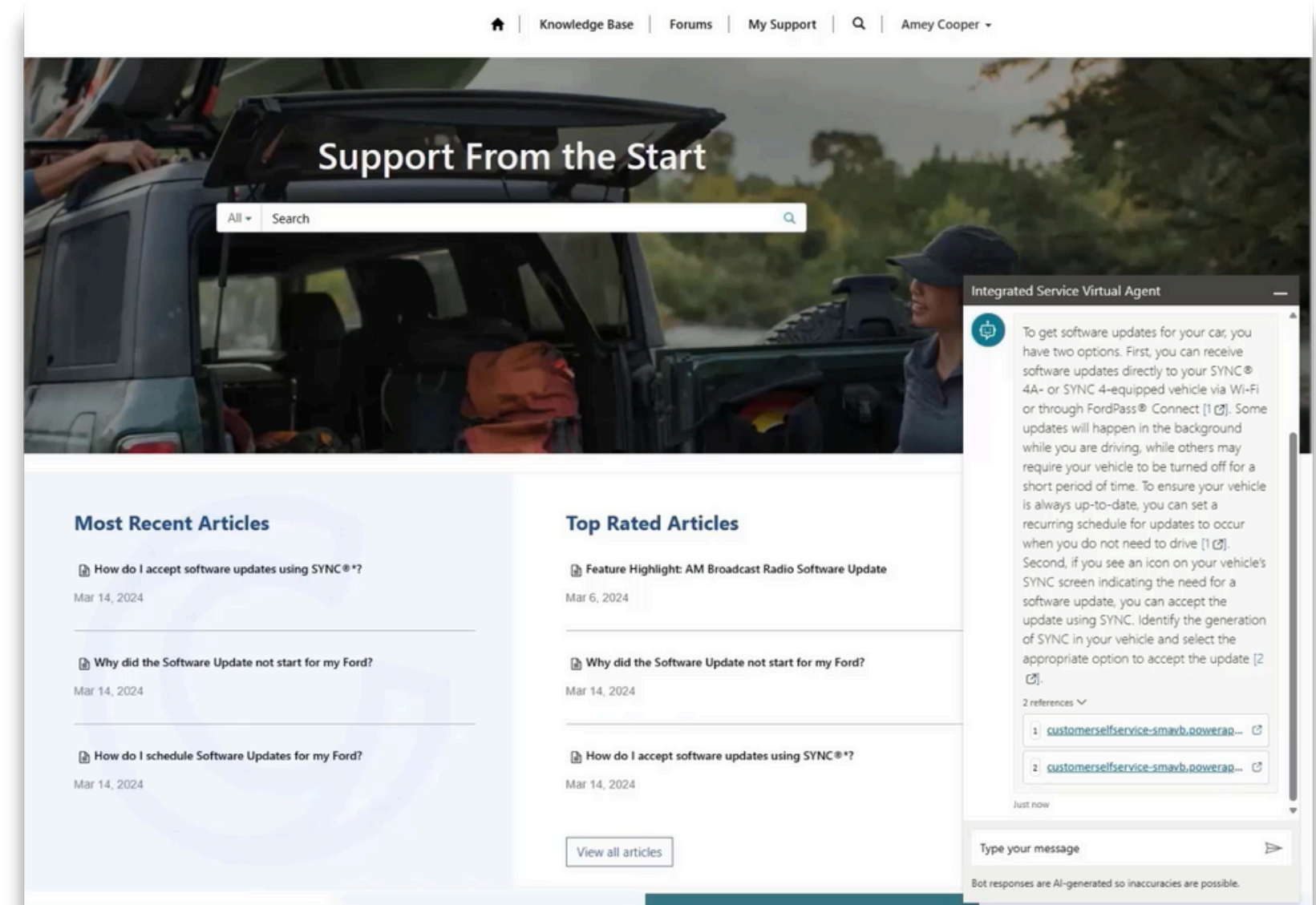
Using Copilot, agents are better equipped, informed, and prepared to meet customer needs, streamlining the path to service excellence.



# Enable Self-Service

**Dynamics 365 Customer Service connects with Power Pages to enhance interactions through comprehensive self-service options.**

- ServerSys specialises in deploying websites that amplify engagement.
- Integrated portals allow customers to easily log service issues and monitor case statuses independently, anytime.
- Clients also benefit from access to knowledge resources and Copilot chat, which addresses frequent questions and deflects potential service requests.
- Convenient online access to contracts, subscriptions, appointments and other records facilitates a self-reliant, satisfied customer base.

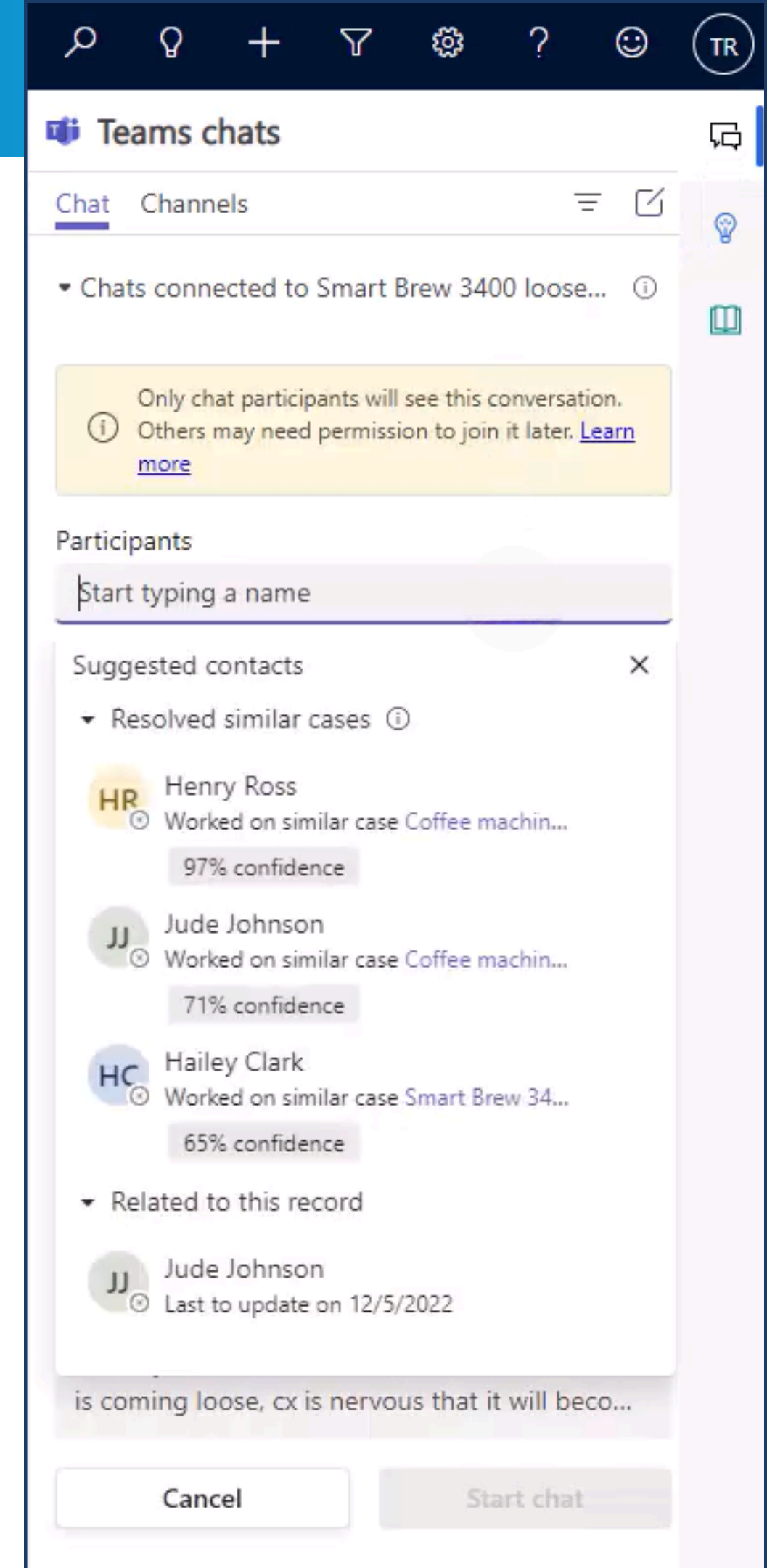




# Collaborate in Microsoft Teams

**Dynamics 365 and Microsoft Teams combine to simplify internal communication, helping agents efficiently resolve issues.**

- Inbuilt integration ensures direct access to co-workers, enabling agents to easily engage in conversations, collaborate, and seek expert advice without leaving the Dynamics user interface.
- Embedded Teams chat within the Dynamics interface minimises the friction of switching between applications, allowing agents to focus on delivering prompt and informed responses.
- Seamless integration between Dynamics 365 and Teams boosts productivity and enriches service experiences with the efficiency and convenience it introduces.



# Serve Customers Where They Are

**Omnichannel capabilities will enable your organisation to meet customers where they are, including voice, SMS and online chat channels.**

- Ensures that each enquiry is intelligently routed to the appropriate agent and equips them with the necessary context to support a quick, personalised response.
- From the Customer Service Workspace, agents can effectively manage requests from any channel and handle multiple sessions concurrently.
- Enables an innovative, connected approach to customer care, resulting in enhanced agent productivity and customer satisfaction.

The screenshot displays the Dynamics 365 Customer Service workspace. The top navigation bar includes 'Home', 'Inbox', and a tab for 'Damien Plank'. The 'Communication panel' shows a status of 'Authenticated' and a customer profile for 'Damien Plank' with a 'Positive' sentiment and a duration of '02:33'. Below this is a toolbar with icons for Mute, Hold, Dialpad, Mark spam, More, and a red call icon. The 'Transcript' section shows a call log starting at 11:51 AM. The transcript includes a message from Galit Stavi (00:00:21) asking for a follow-up on a kiosk installation, a response from Damien Plank (00:00:59) stating the kiosk is running smoothly, and a follow-up from Galit Stavi (00:01:32) expressing happiness and requesting further instructions. Damien Plank's final response (00:02:09) is 'That would be amazing, thank you!'. On the right, the 'Email' composition pane is open, showing a draft titled 'Follow-up on the kiosk installation' with 'From: Galit Stavi' and 'To:' fields. The 'Attachments' section is empty, and the 'Regarding' field is set to 'Retail Kiosk Installation and Service'.

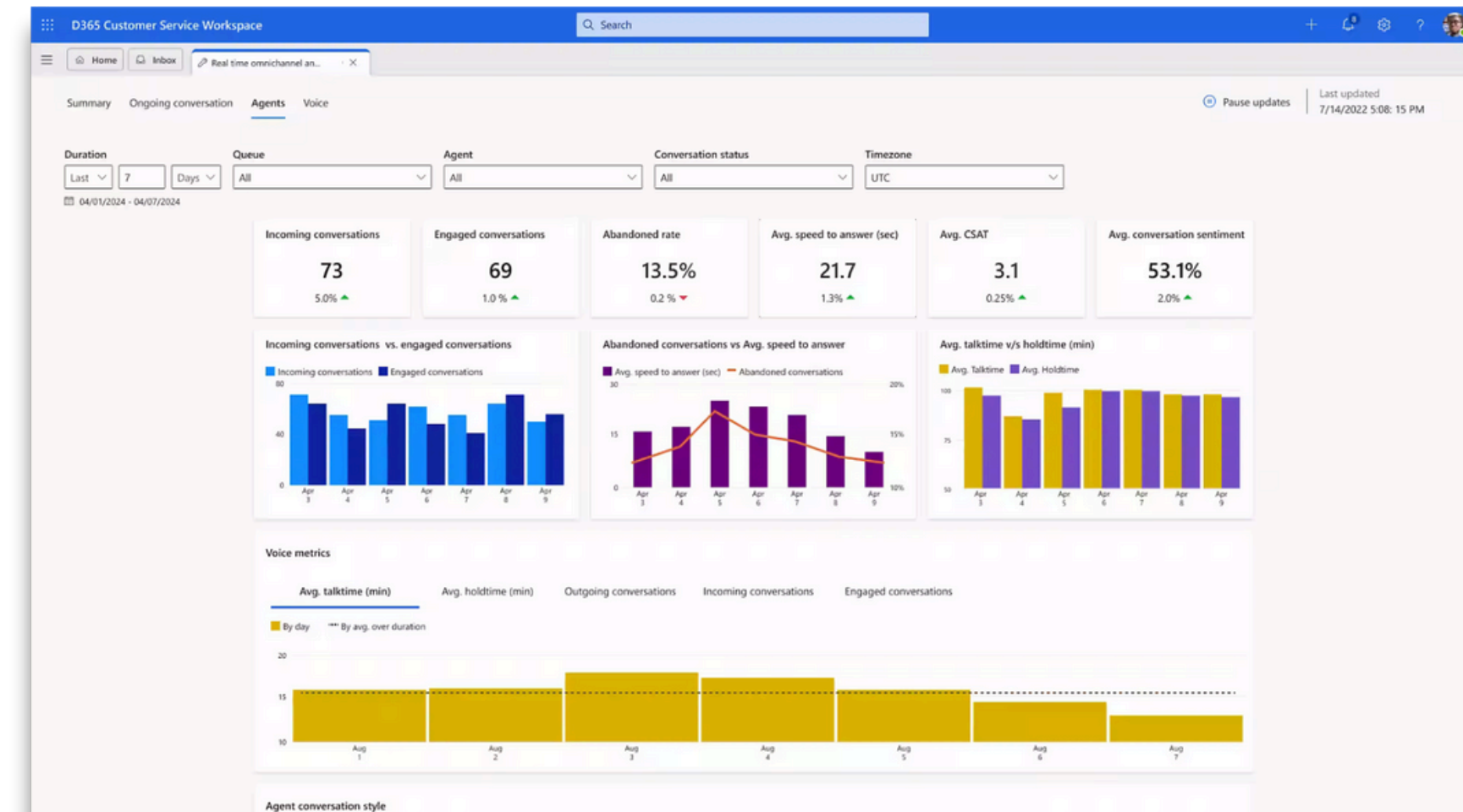


# Optimise Service Operations

**Unlock actionable insights and streamline your service operations with the robust analytics of Dynamics 365.**

- Use inbuilt Power BI integrations to explore data-rich, interactive visualisations for a clear perspective on customer behaviour, agent efficiency, and overall service quality.
- An omnichannel insights dashboard brings AI-driven conversation analysis and key performance indicators into one accessible location.

These tools facilitate proactive adjustments, drive continuous improvements, and help everyone consistently meet customer satisfaction benchmarks.



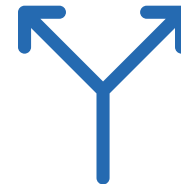
# Our Dynamics 365 Customer Service Solutions Include:



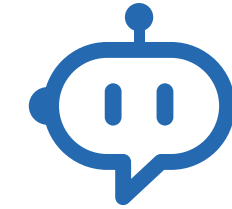
**Case  
Management**



**Knowledge  
Management**



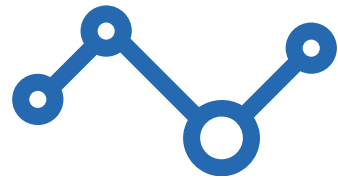
**Routing  
Rules**



**Copilot  
Enablement**



**Service Level  
Agreements**



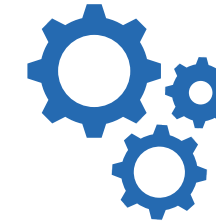
**Service KPI  
Dashboards**



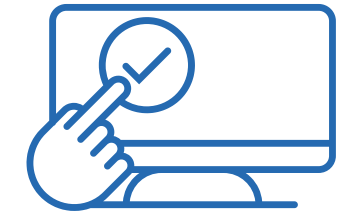
**Feedback  
Surveys**



**Sentiment  
Analysis**



**Workflow  
Automation**



**Self-Service  
Portals**



**360° Customer  
View**



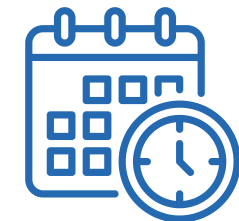
**Offline Mobile  
Access**



**SMS  
Channels**



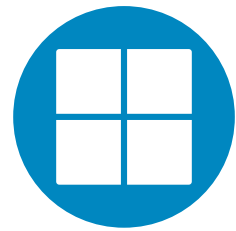
**Service  
Insights**



**Service  
Scheduling**



# About ServerSys



We are a leading **UK Tier-1 Microsoft Cloud Solutions Provider** and a Dynamics 365 and Power Platform Partner.



We offer **web portal and CRM development, consultancy, support and training** to financial services organisations and companies across many sectors.



We have been **in operation for over 25 years** and take pride in our **96% client retention rate**.



Our **self-service portals** reduce costs, **enhance communication** and improve client onboarding.



We enable organisations to streamline processes and connect their data with Dynamics 365 to provide a **single source of accurate data**.

We build collaborative partnerships with organisations including:







## Speak to us today

Let ServerSys help you strengthen relationships, boost productivity and create better experiences with Dynamics 365 Customer Service.

Contact us to discuss your requirements.

Microsoft Partner

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