



ServerSys

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.

The screenshot displays the Dynamics 365 Customer Service workspace. At the top, it shows 'Dynamics 365' and 'Customer Service workspace'. The main interface is divided into several sections:

- Inbox views:** A sidebar on the left lists various views such as 'Assigned conversations', 'Assigned to me', 'All tasks', 'All work items', 'Cases', 'Leads view', 'My draft emails', 'My Chat', 'My Email', 'My Worklist', 'Notes', 'Old conversations from teams...', 'Resolved conversations', 'Resolved conversations of ou...', 'Team's Cases', 'Team's high priority', 'Unassigned', and 'Unassigned conversations'.
- Assigned conversations:** The main central pane shows a list of conversations. The top section is for 'Today' (2 items) and the bottom for 'Yesterday' (19 items). Each conversation card includes the agent's name, a subject line, the queue name, and the message type and time. For example, Dawn Carlson has a message 'Regarding CVD-900 Printer' in the 'Shipment management' queue, received at 11:05 AM. Other agents shown include Keiko Tanaka, Aadi Kapoor, Wanda Howard, Eric Ishida, Mauricio August, Carole Poland, and Kadji Bell.
- Customer Profile:** On the right, a card for Dawn Carlson shows her account details: 'Account : 654-ADU-753', phone number '+1-201-555-0159', email 'dcarlson@contosoprinting.ne', and address '1010 Southeast Way Unit D, Roseland, New Jersey 07068'. Below this is a 'Recent cases' section with three entries: 'Billing info A31006 Closed', 'Error message A29957 Closed', and 'Service warranty A31037 Closed'. At the bottom right, a 'Recent purch... [Extentions]' section shows two purchase records with dates, IDs, and amounts.



# 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.



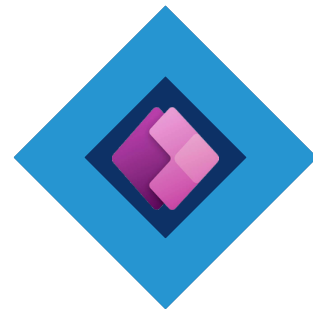
## **Dynamics 365 Customer Service**

Empowering teams to consistently deliver personalised service.



## **Dynamics 365 Customer Insights**

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



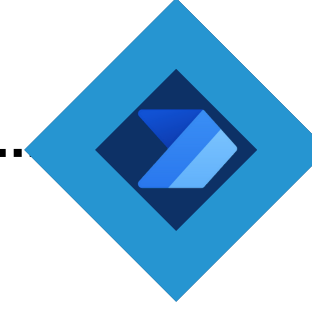
## **Power Apps**

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



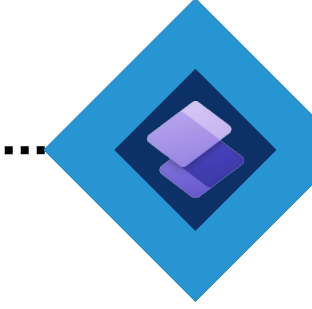
## **Power BI**

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 interface. At the top, the header shows 'Dynamics 365' and 'Customer Service workspace'. Below the header, there are navigation tabs for 'Home' and 'Inbox'. The main area is divided into two columns. The left column shows a list of cases, categorized by 'Today' (1 case) and 'Last week' (7 cases). The right column shows a detailed view of a selected case, 'Account review request - Saved'. The case details include a title, customer name, and status. Below the case details, there are sections for 'SLA Timers' (showing 'First response by 17h:22m' and 'Resolve by Succeeded') and 'Basic details' (including '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').

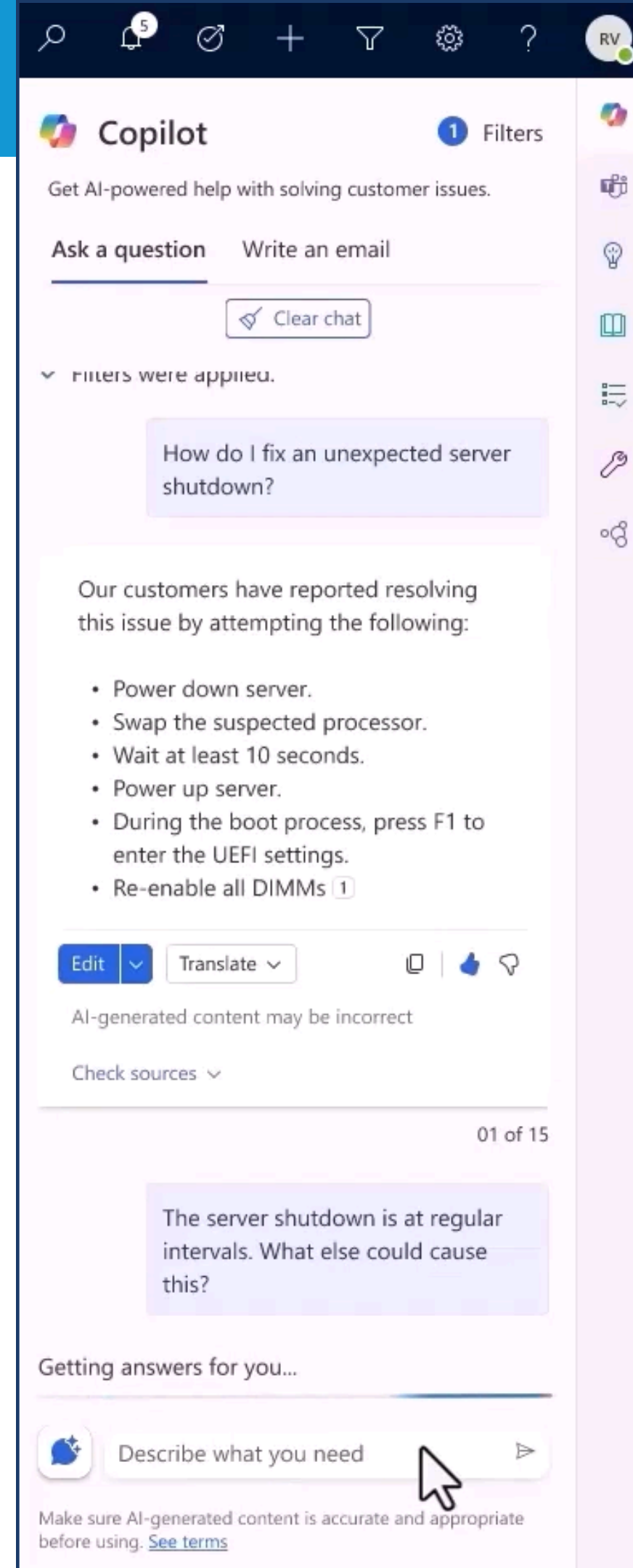
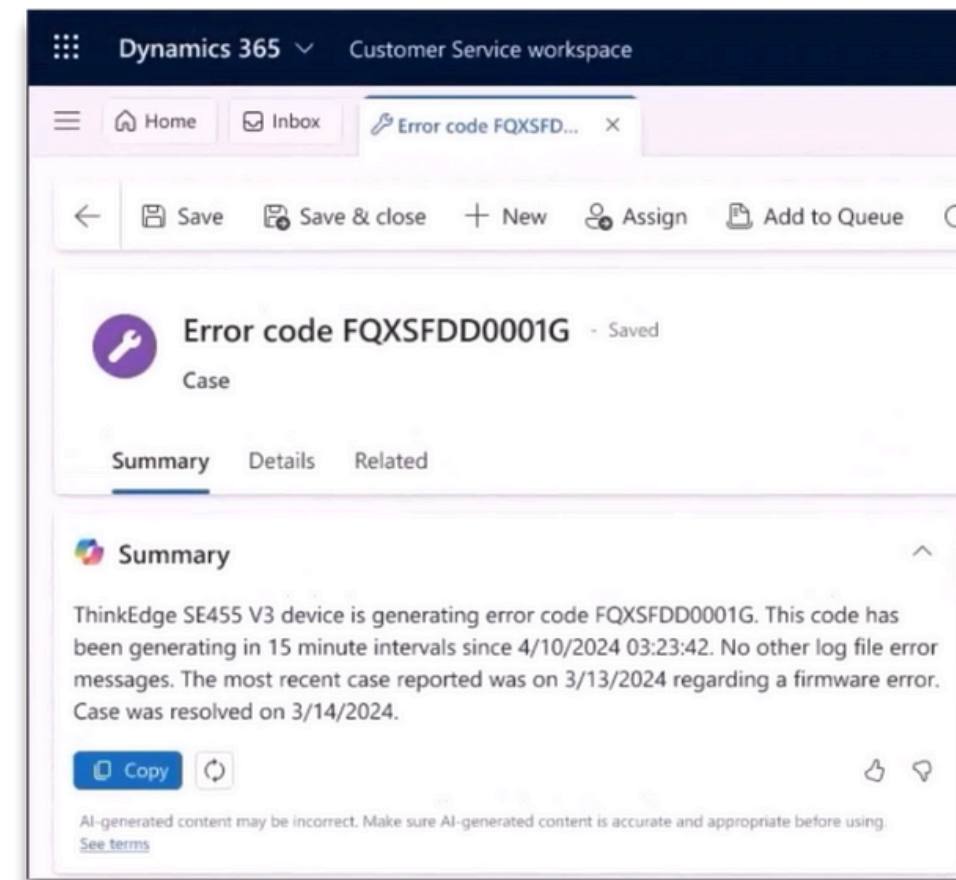


# Increased Agent Productivity

## 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.

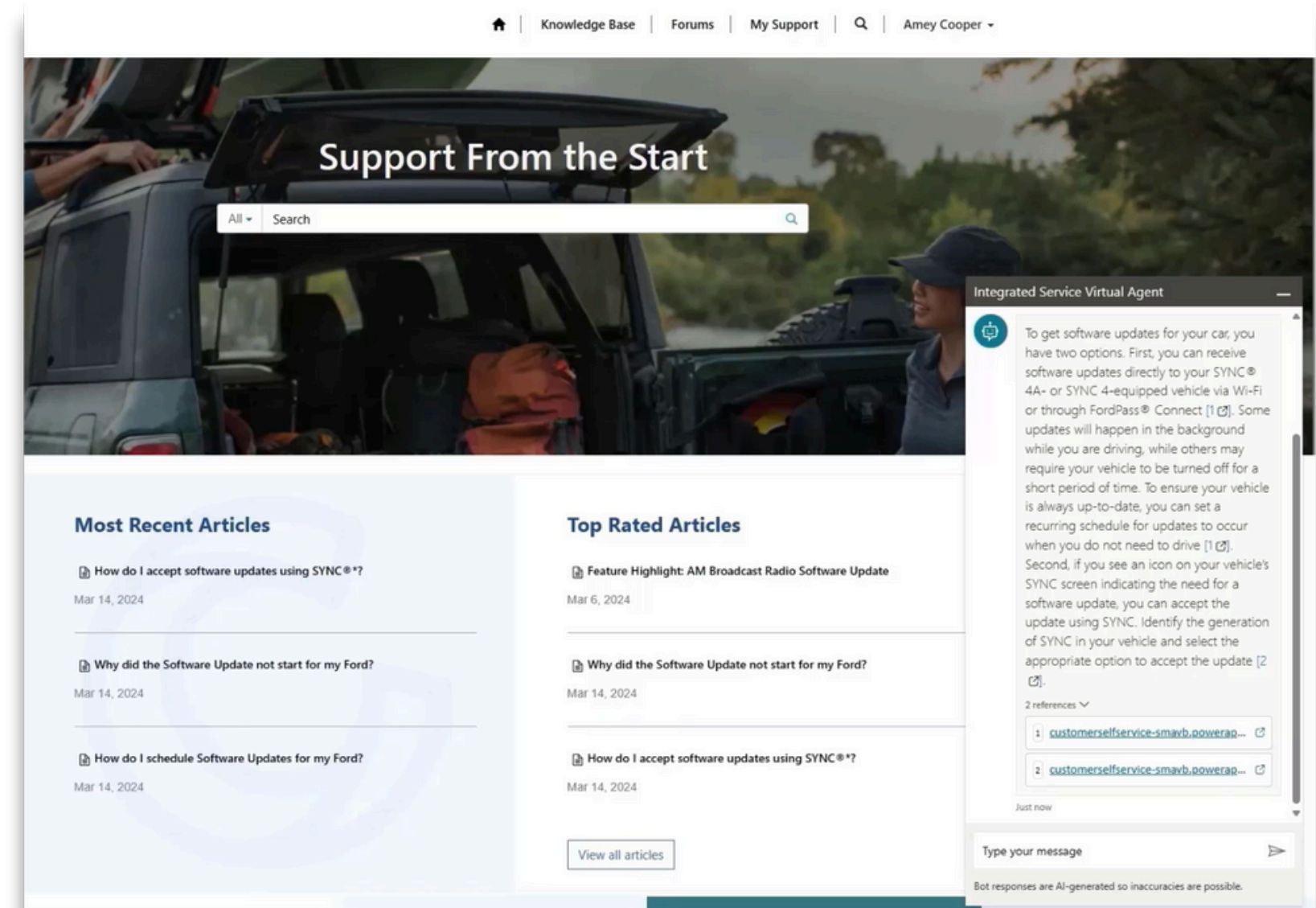
Using Copilot, agents are better equipped, informed, and prepared to meet customer needs, streamlining the path to service excellence.



# 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.

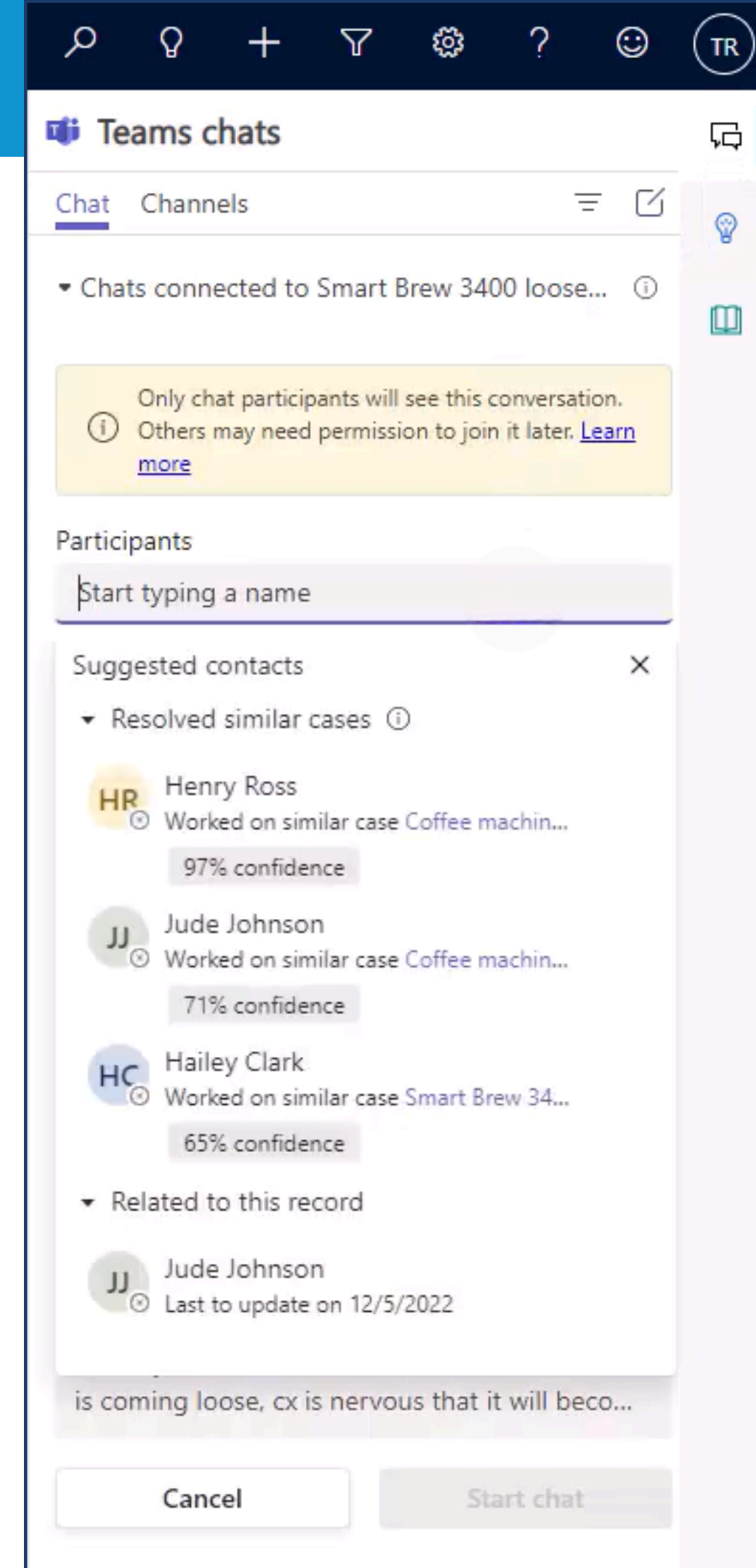




# Collaborate in Microsoft Teams

## 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. At the top, it shows 'Dynamics 365' and 'Customer Service workspace'. Below this is a navigation bar with 'Home', 'Inbox', and a tab for 'Damien Plank'. The main area is divided into two panels. The left panel, titled 'Communication panel', shows a call transcript for Damien Plank, a customer. The transcript includes a call start time of 11:51 AM and a recording/transcription start time of 11:51 AM. The transcript shows a conversation between Galit Stavi (VanArsdel) and Damien Plank. Galit Stavi's message (00:00:21) says: 'Hi Damien, this is Galit from VanArsdel. I'm calling to follow-up on the installation. How did it go?'. Damien Plank's response (00:00:59) says: 'Hi Galit, it went great! Everything is up and running smoothly. Very cool looking kiosk and it's getting a ton of attention.'. Galit Stavi's next message (00:01:32) says: 'I'm so happy to hear that! Let me know if you run into any problems. In the meantime I'll follow up with a recap and some instructions for operating and maintaining the kiosk.'. Damien Plank's final message (00:02:09) says: 'That would be amazing, thank you!'. The right panel shows an email composition window titled 'Follow-up on the kiosk installation'. The email is addressed to Damien Plank and is categorized as an 'Enhanced Email'. The 'From' field is filled with Galit Stavi. The 'To' and 'CC' fields are empty. There is a 'Subject' field with the placeholder text 'Add a subject'. Below the subject field is an 'Attachments' section. At the bottom of the email composition area, there is a 'Regarding' field with the value 'Retail Kiosk Installation and Service'. The top right of the email composition area has buttons for 'Send', 'Save', 'Use template', and 'Add signature'. The bottom right of the email composition area has a rich text editor with a font color dropdown set to 'Calibri', a font size dropdown set to '11', and bold, italic, and underline formatting options.

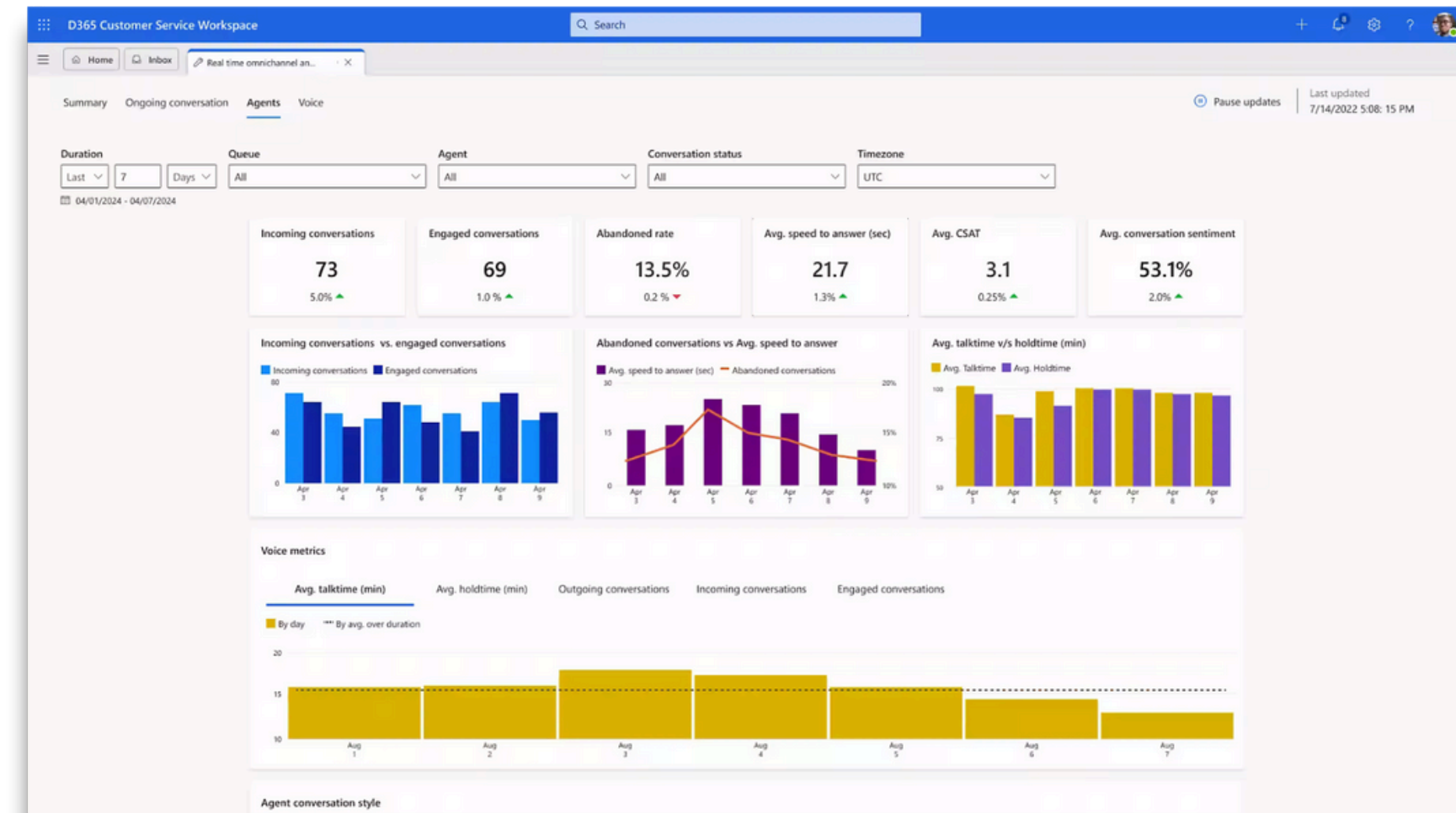


# Optimise Service Operations

**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.



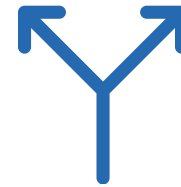
# Our Dynamics 365 Customer Service Solutions Include:



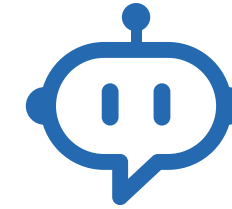
**Case  
Management**



**Knowledge  
Management**



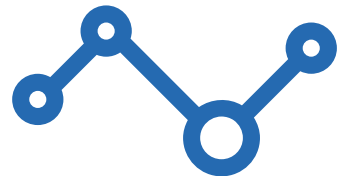
**Routing  
Rules**



**Copilot  
Enablement**



**Service Level  
Agreements**



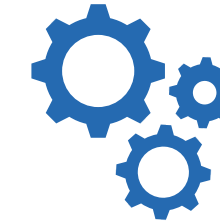
**Service KPI  
Dashboards**



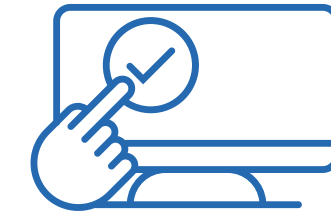
**Feedback  
Surveys**



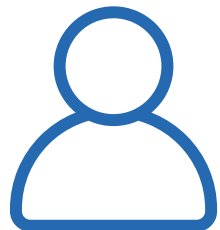
**Sentiment  
Analysis**



**Workflow  
Automation**



**Self-Service  
Portals**



**360° Customer  
View**



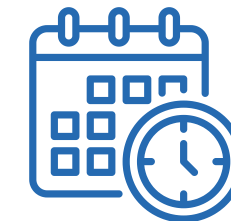
**Offline Mobile  
Access**



**SMS  
Channels**



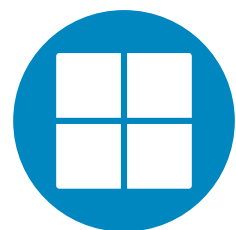
**Service  
Insights**



**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.

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