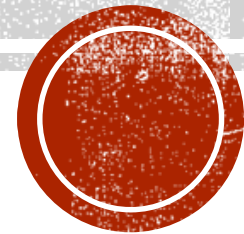


# 5 WAYS TO AUTOMATE DYNAMICS 365 CUSTOMER SERVICE

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# AUTOMATIC RECORD CREATION

- Achievable in any version of Dynamics 365/CRM
- Configuration of automatic record creation depends on the version of Dynamics 365 Customer Service
- Example: OOB Configuration or Custom Queues/Workflows
- Ideal for email mailbox monitoring
- Automatically create records and set values based on conditions
- Send auto-responses to acknowledge receipt
- More info:
  - [Create and manage queues](#) (use this to set up the mailbox for monitoring)
  - [Automatic record creation overview](#)
  - [Automatically create a case from an email](#)



# EMAIL TEMPLATES

- Email Templates allow for standard messaging
- Multiple templates can be created for entities
- Include personalized customer information
- Create templates for email



# ROUTING RULES

- Take the guess work out of where to direct cases
- Ideal for any user
- Establish rules for where cases are routed
- Automatically route records on automatic case creation
- Users can manually run routing rules
- [Create a routing rule set](#)



# KNOWLEDGE ARTICLES

- Provide a knowledge base that is searchable
- Common answers and solutions can be quickly found by customer service representatives
- Available on case and other entities
- Capture and share knowledge internally and externally
- Setup knowledge management
- Create and manage knowledge articles
- Search for knowledge articles



# SHARING MULTIPLE KNOWLEDGE ARTICLES

- Currently Dynamics 365 Customer Service Knowledge article sharing options include:
  - Email one article at a time
  - Email a link to one article at a time
  - Copy a link to an article
- Cases may have many articles linked to it that need to be shared
- This custom solution will allow you to include all linked articles in an email
- [Insert all linked articles in an Email](#)

