UNLOCK YOUR CUSTOMER DATA

# CRM & POWER PLATFORM CUSTOMER DAY 2023

Landing Issues and Queries Centrally in the Customer Service Workspace and Omni Channel

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# Hi!

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# What we'll cover

1. Hands up

2. Dynamics CRM Apps

3. Out of the Box Templates

4. Customer Service Workspace FAQ's

5. Advantages of Customer Service Workspace

6. Demo

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# Does anyone use Customer Service Hub?

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# Dynamics CRM Apps

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# Customer Service Workspace FAQ's

**I have never heard of Customer Service Workspace, When was this released?**

CSW was originally released in Wave 1 2020

**We currently use the Customer service hub to process cases, do we need an extra licence for CSW?**

You will require an active subscription to Microsoft Dynamics 365 Customer Service Enterprise in your tenant for each user. Not licenced using Customer Service Professional licence.

**Are there any limitations I need to be aware of?**

Customer Service workspace isn't supported in mobile devices, Unified Service Desk, and with Dynamics 365 Customer Engagement (on-premises), SAAS only,

**Do I have to have Omnichannel to use CSW?**

No, although Omnichannel provides additional ways to feed customer communication in to CSW, it is not required to use the app to manage your CRM data.

**Is the CSW just for Cases?**

Although you manage other elements such as opportunities, the CSW is primary driven to help manage cases and other elements related to cases.

**We like the idea of using Omnichannel, does it need an additional licence?**

Yes, For each chat channel user, you must have an active subscription to the Dynamics 365 Customer Service Digital Messaging add-on for each Digital Messaging user.

**We have an on-premise CRM system can I use Omni channel?**

Omnichannel for Customer Service is not supported with Dynamics 365 Customer Engagement (on-premises). It is also worth noting Omnichannel for Customer Service is supported only on desktops, and not on phones and tablets**.**

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# Customer Service Workspace Advantages

- Allows agents to work on multiple sessions at a time in a single app
- Agents can work on up to nine sessions and within the app, they can open up to 10 tabs
- A new session is launched when an agent opens a case from the Home session or accepts an incoming conversation
- **Optional agents who work on cases can also engage with customers via channels like Live Chat, voice, and SMS without leaving the app, by using the Dynamics 365 Customer Service Digital Messaging add-on (Omni Channel)
- Smart Assist – In the product pane Smart assist suggest KB articles and other recent case that might help an agent solve a case quicker
- Take advantage of Agent Text, Agent Scripts and Macros
- Customize the agent experience with Customer Service admin centre using app experience profiles
- Only one browser tab required to view and management multiple elements of CRM

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# Customer Service Workspace Advantages

- Define which tabs in a session, automatically start ie. Dashboard, Account, Case & Contact
- Enable of disable the ability for agents to close specific application tabs.



Active Application Tab Templates ∨

| | Name ↑ ∨ | Can close ∨ | Title ∨ | Page Type ∨ | Modified On ∨ |
|---|---|---|---|---|---|
| ○ | Customer Summary | No | Customer Summary | Entity Record | 18/04/2023 19:05 |
| | Entity record | Yes | | Entity Record | 18/04/2023 19:05 |
| | Knowledge Search | No | Knowledge article search | Web Resource | 18/04/2023 19:05 |
| | Omnichannel Conversations Dashboard | No | | Dashboard | 18/04/2023 19:05 |
| | Omnichannel Intraday Insights | Yes | Omnichannel Intraday Insights | Control | 18/04/2023 19:05 |
| | Quick Reply Preview | Yes | Quick Reply Preview | Control | 18/04/2023 19:05 |
| | Rich Message Preview | Yes | Rich Message Preview | Control | 18/04/2023 19:05 |
| | Search | No | Omnichannel Search Page | Control | 18/04/2023 19:05 |

Edit columns    Edit filters    Filter by keyword

# Customer Service Workspace Setup Hierarchy



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# Omnichannel Integration

- Uses the OOTB Omni channel Customer Service Workspace App
- Inbound chats create conversations within the app for agents to pickup, chat with the customer within the context of the app, create contacts, accounts, cases, managed through to resolution and closure
- Manage activities and cases created from web chats, Voice Calls, Email, Facebook, Twitter and SMS
- Instant interaction with your customer
- Ability to create quick reply to keep your company on brand. Examples of this would be Intro greeting, company information, chat outro scripts
- The ability to match incoming chats to information within your CRM database (if customer is already known)
- Pass chats/call to other Omnichannel users in the organisation
- Create Swarms for Cases that require additional information from other agents in your organisation
- Chat Transcripts and voice calls saved to the timeline as a conversation

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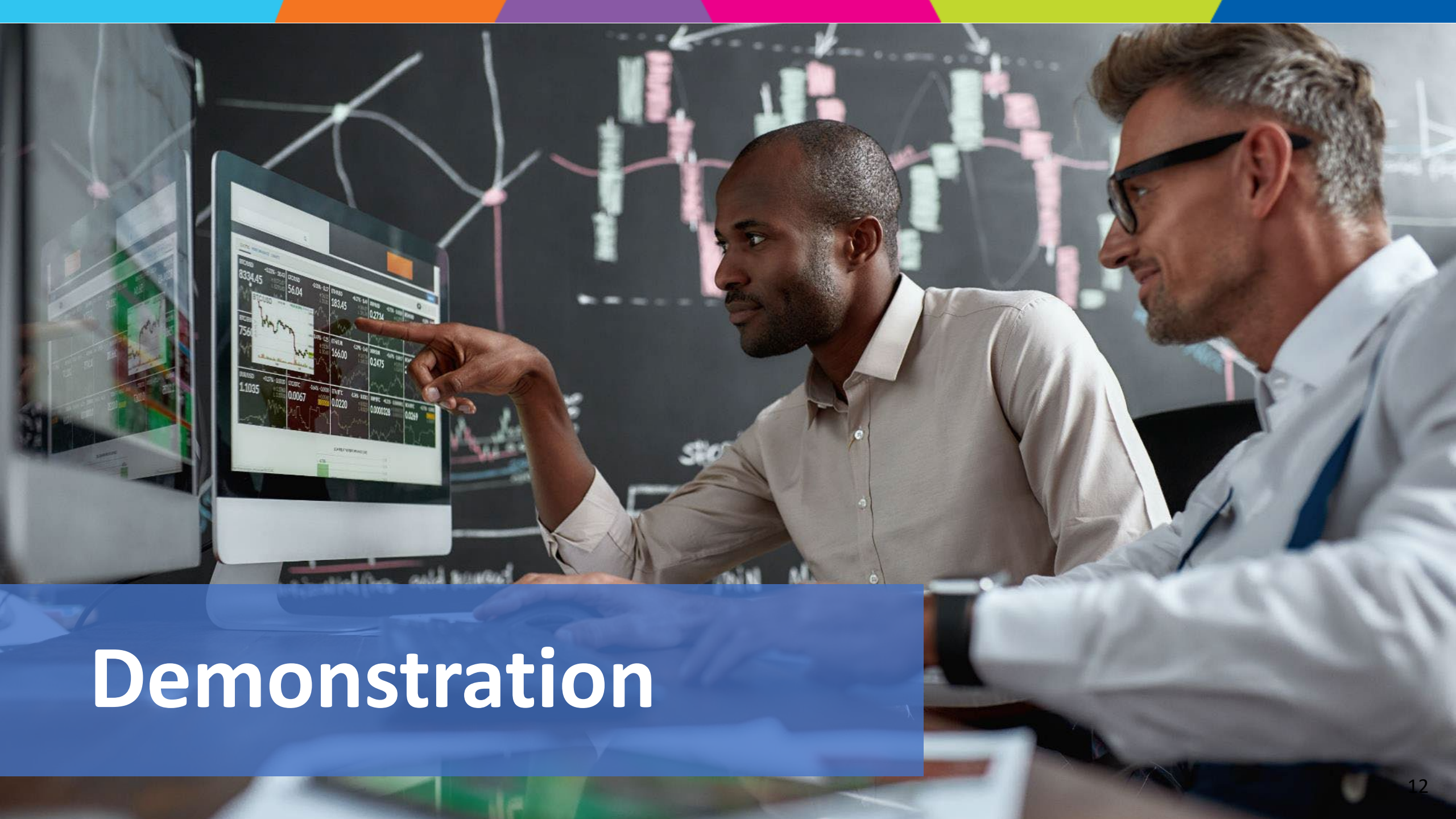
# Demonstration

# Demo

- Demo of Customer Service Workspace App and Omni Channel for Customer Service
- Things to Note
- Multi Session – Holding Shift
- Auto load related records
- Smart Search – KBs and Related Cases (favouriting)

- Personalisation Settings

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Thank you.

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