Dynamics 365 - Cases Quick Guide

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Cases Quick Guide

- Search for the Contact and the account - If they don't exist, create the records.
- Navigate to Cases in the left menu
- Select New Cases
- Complete details of the case going left to right
    - Type a Case Title
    - Case Number is populated automatically once the case is saved.
    - Search for the contact name in the Customer field. This will pull through the contact and the account.
    - Select the Product, using your company prefix. For e.g CA, SY, AP etc
    - Entitlement - not currently used
    - Enter a brief summary of the case in the Description field
- Save
- Add any notes, documents or activities to the Timeline
- Click into the Details tab
- Complete any Additional Details. For e.g. Type & First Response Sent
- Move the progress bar to the next stage once the query/issue is identified
- Add any communication, investigation and documents to the timeline as you work on the case.
- When the case is resolved, move the progress bar to Resolve
- Click Resolve Case in the top tool bar
- Add details of the resolution

Important Notes:

Suggested Fields

Dynamics includes a smart feature that suggests options for certain fields. However, these suggestions must be confirmed before saving. Suggested options appear in blue, review and confirm or discard these suggestions before saving the record.