AKITA
Intelligent Solutions

Microsoft Dynamics 365 – QuickStart Customer Service

The smarter way to manage customer communications, deliver professional and effective service and support at scale – without losing the personal touch.

With a QuickStart deployment, Akita Intelligent Solutions will deploy Dynamics 365 Customer Service in just five days, in turn transforming your sales process.

Features of Dynamics 365 Customer Service

- Queue, case & calendar management
- AI-enhanced customer communication management
- In-depth service management analytics
- Omnichannel communication methods & monitoring
- Product information & knowledge article repositories
- Service scheduling & management tools

QuickStart Sales Costs From £3,500* - Contact Us For More

* Licensing to be provided by Akita at an additional cost and subject to requirements
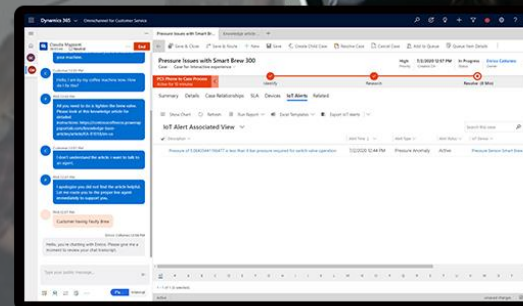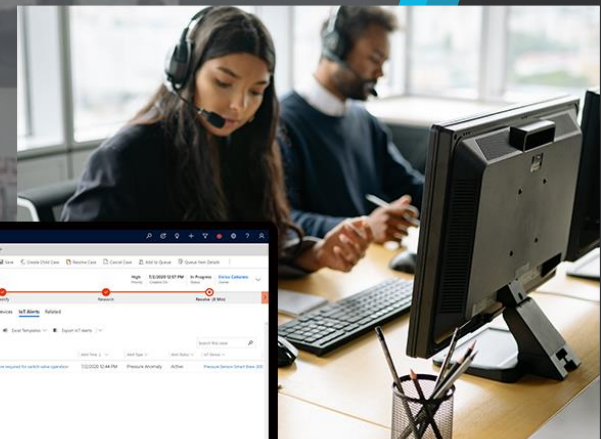
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About Akita Intelligent Solutions

As a Microsoft Gold Partner, we deliver bespoke solutions using technologies including **Microsoft Dynamics**, **SharePoint**, **Teams** and **Power Platforms** (Power BI, Power Apps, Power Apps Portals and Power Automate).

QuickStart Customer Service – Deliverables

Day 1: Core Deployment & Configuration

- Environment Creation
- Locale Settings
- Customer Service Deployment
- Core Customer Service Settings
- Corporate Branding
- Deploy Customer Service Accelerator

Day 2: Setup Users

- Create Users
- Setup Security Assignments
- Setup base user settings
- Configure Outlook integration and Outlook app deployment

Day 3: Integration & Queue Management

- Configure incoming email support mailboxes
- Configure User mailboxes
- Deploy Dynamics 365 Outlook Add-in
- Configure queues
- Configure subject management
- SharePoint integration
  - Document storage on case and account
- Teams integration
  - Teams chat integration
  - Teams VoIP integration
- Set up users

Day 4: Customer Data Import & Service Level Management

- Import of Accounts
- Import of Contacts
- Configure SLAs KPIs with breach actions
- Configure routing rule sets
- Creation of auto case creation rule
- Configuration of email templates (e.g. case created, case resolved etc.)

Day 5: Training

- Training users on web interface
- Training users on Dynamics 365 Outlook Add-in

Our Approach

Simplify – Understand processes and remove unnecessary steps

Automate – Replace repetitive tasks and remove the need for interaction

Optimise – Use the right technology to achieve more with the same resources

Unify – Bring data out of silo to provide a complete picture of performance and enhance BI

Gold
Microsoft Partner

Microsoft