

THE CROSS-DEPARTMENT COMMUNICATION TOOLS IN DYNAMICS, THE CASES FOR ACTIVITIES

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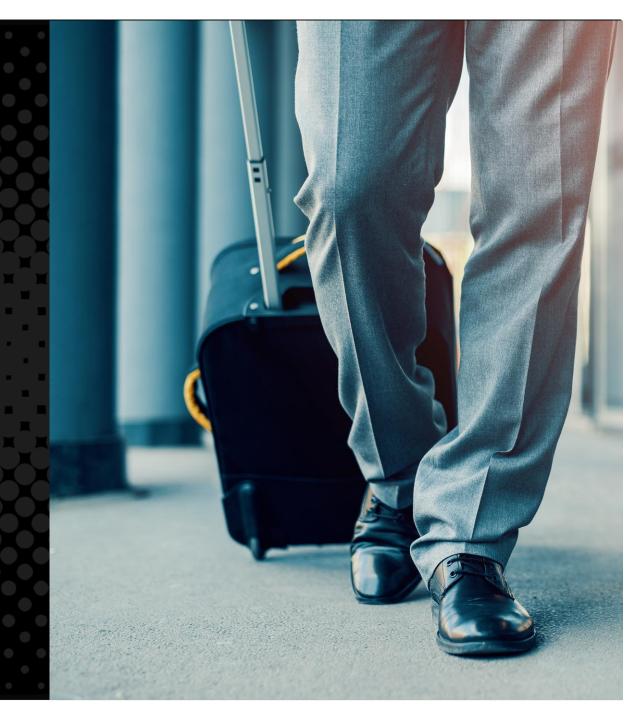






What did the lawyer do with their luggage after it became too heavy?





Agenda

- Difference between cases and activities
- Configuration check list for cases and activities
- Collections example of cases and activities
- Sales example of cases and activities
- Quality assurance example of cases and activities
- Human resources examples of cases and activities





What is a case



Long-term way to track an issue



Has statuses



Can have workflow



Integrates with several other module





Can link to multiple records



Can have activities

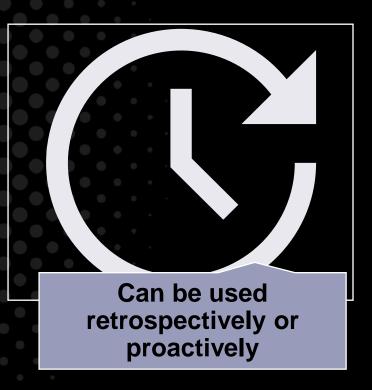




WHAT IS AN ACTIVITY?







WHEN SHOULD I USE CASES AND ACTIVITIES?

Did it already happen?	Activity
Is there a process to follow?	Cases
Do I need to reminder to do something?	Activity
Does this relate to more than one thing?	Cases
Do I need to add this to my calendar?	Activity
Is research or additional resources required?	Cases

WHICH TYPE OF ACTIVITY SHOULD I USE?



Action

Already happened



Task

Need to happen in the future



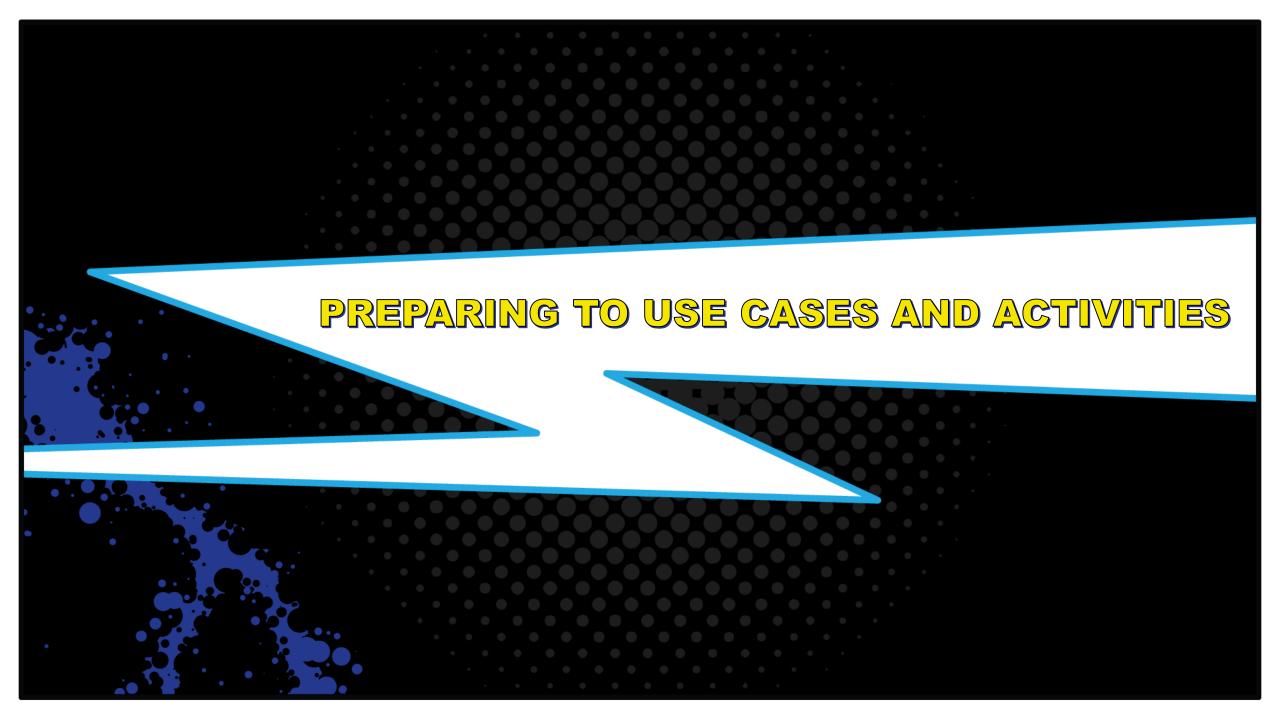
Event

Already occurred



Appointment

Needs to happen in the future





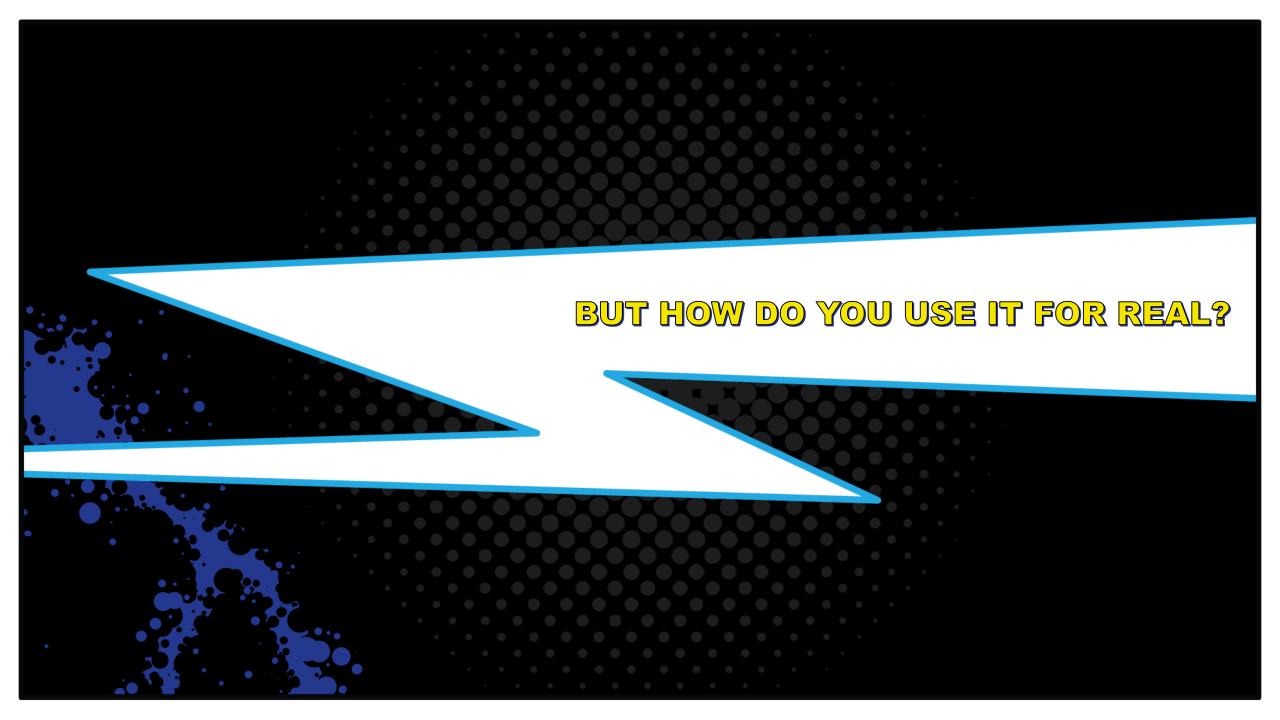
CASES CONFIGURATION CHECKLIST

- □ Case ID number sequence → Org admin > Organizations > Legal entity > Number sequences FastTab
- ☐ Case categories → Org admin > Setup > Cases
- ☐ Case category type security → Org admin > Setup > Cases
- ☐ Email IDs* → Org admin > Setup > Organization email templates
- □ Department* → Human resources > Departments
- □ Priorities* → Sales and marketing > Setup > Leads
- □ Process templates* → Org admin > Setup > Activities
- □ Responsibilities* → Sales and marketing > Setup > Sales management
- ☐ Case process* → Org admin > Setup > Cases
- ☐ Case workflow* → Org admin > Setup > Cases
- ☐ Knowledge articles* → Common > Common > Document management



ACTIVITY CONFIGURATION CHECKLIST

- ☐ Activity plans* → Org admin > Setup > Activity
- ☐ Activity phases* → Org admin > Setup > Activity
- ☐ Activity type* → Org admin > Setup > Activity
- □ Responsibilities* → Sales and marketing > Setup > Sales management



COLLECTIONS CASES STORY











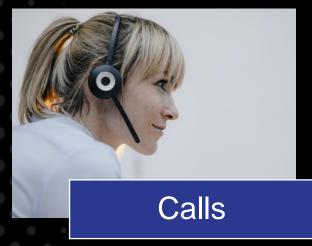
- Can link to multiple invoices
- Multiple steps to resolve
- Long period of time to resolution



COLLECTIONS ACTIVITIES STORY



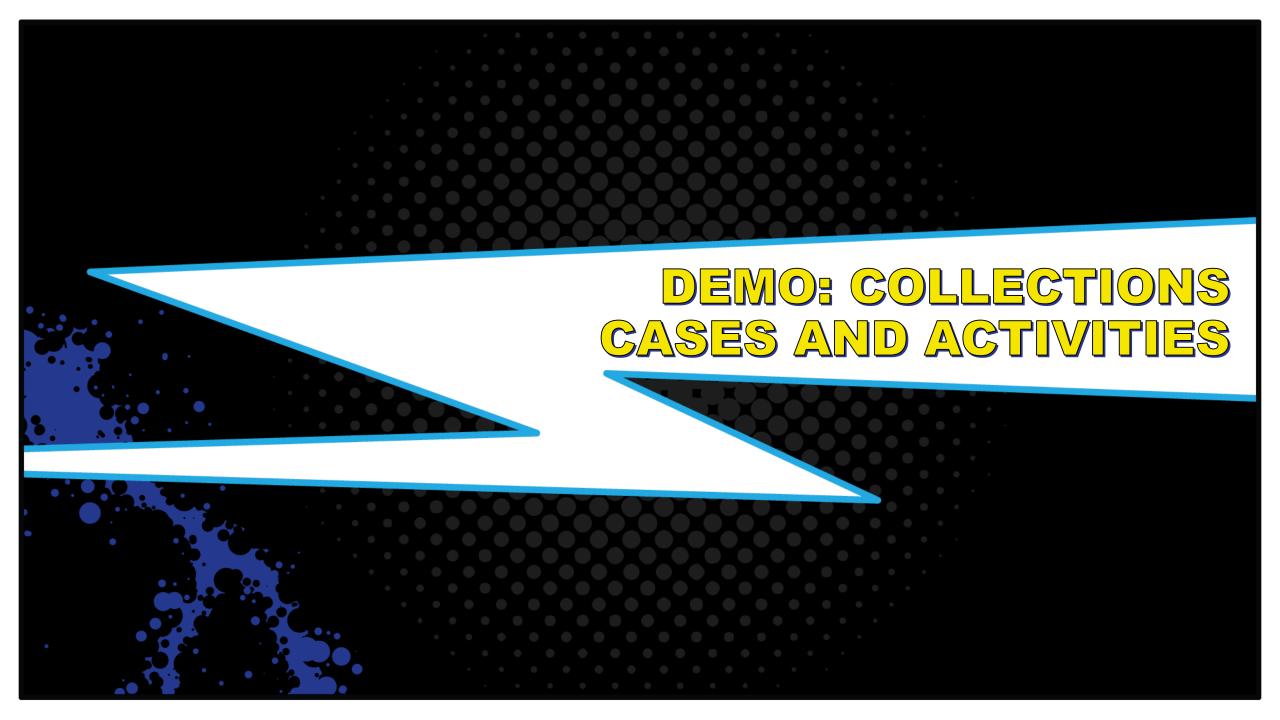






- ✓ Automatically links to customer
- ✓ Already happened
- ✓ Need a reminder to follow up
- **✓Only one step**





SALES CASES STORY





Damaged product









- Can link to multiple items or orders
- Can use knowledge article for common issues



SALES ACTIVITIES STORY



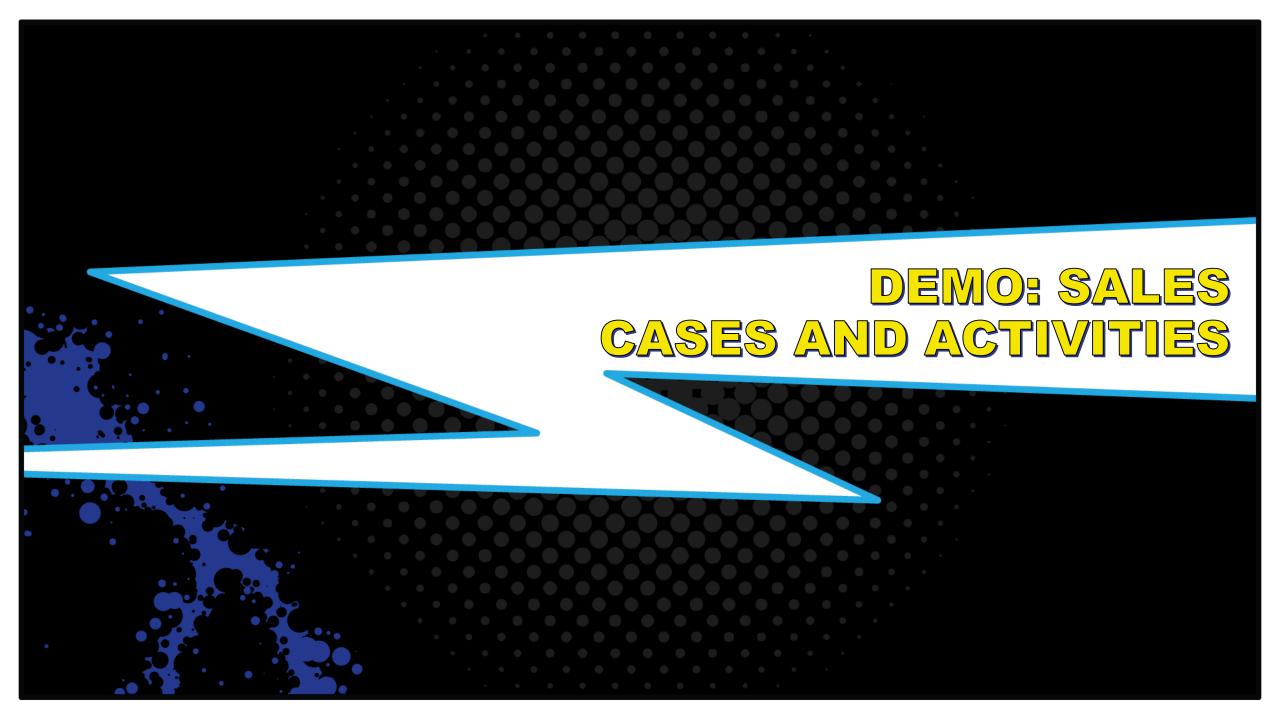






- Automatically links to customer
- Already happened
- Need a reminder to follow up
- Only one step





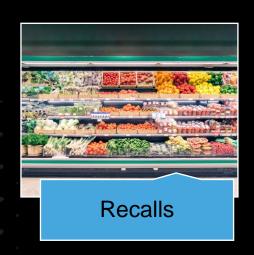
QUALITY ASSURANCE STORY





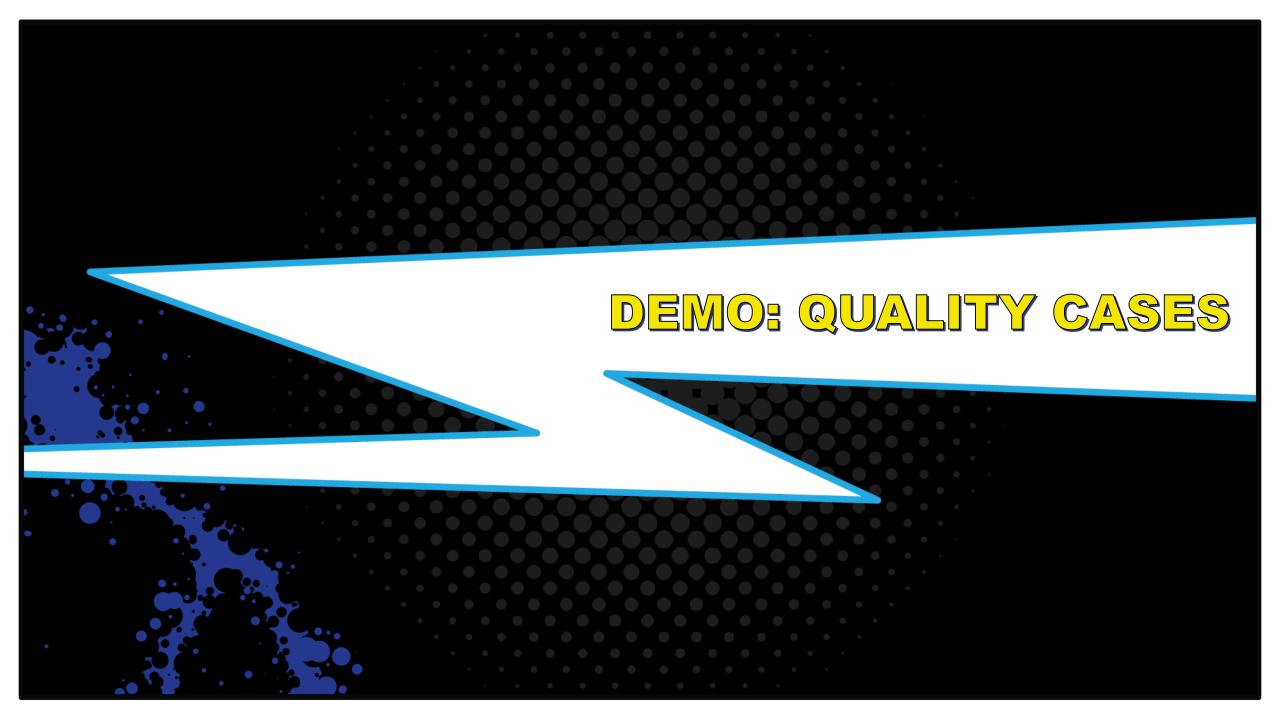




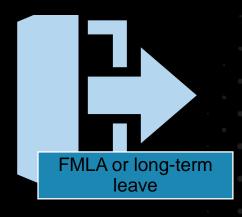


- Items
- Vendors
- Customers
- Sales orders
- Purchase orders

- Production orders
- Quality orders
- BOMs/Formulas
- Routes



HUMAN RESOURCES STORY





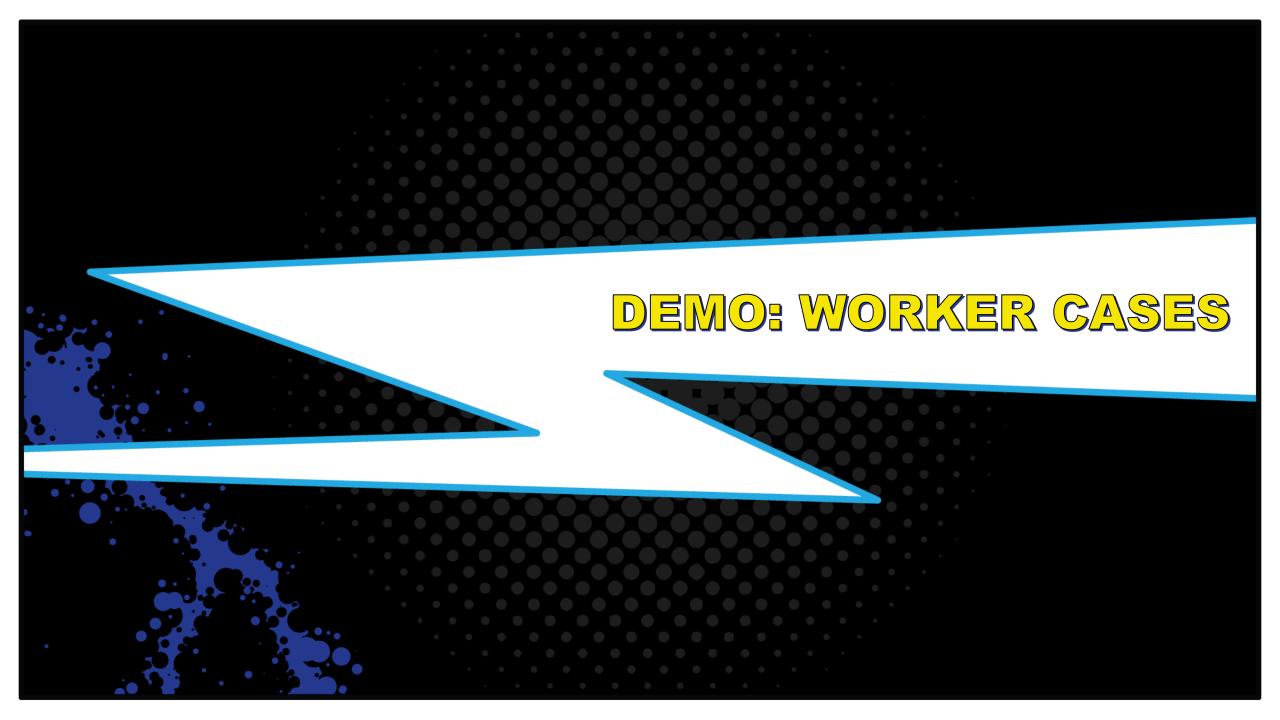






- Can link to workers
- Use workflow to route and manage the process and approvals

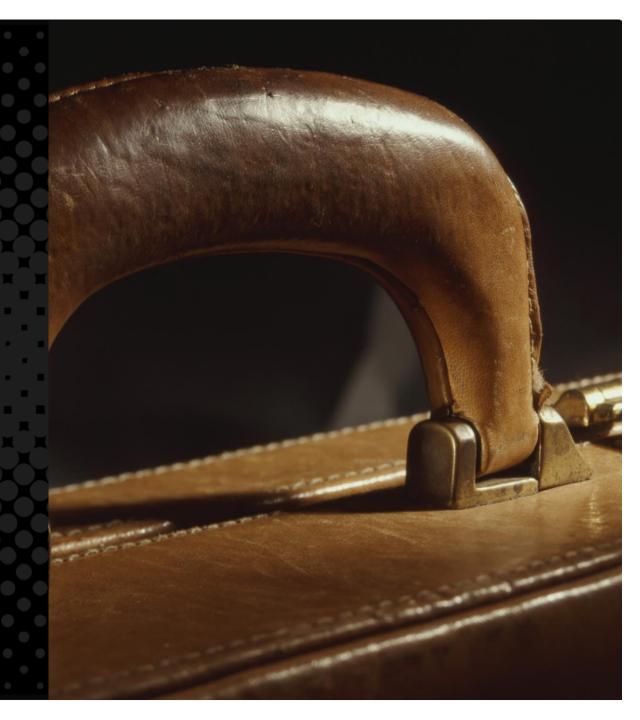




What did the lawyer do with their luggage after it became too heavy?

He rested his case!





QUESTIONS



