

Solidigm Training

Job Aid

Global Contact Center Agents (GCC)

Navigate the Tool

::: Dynamics 365	Omn	channel for Customer Service	,⊘ Search	Q + 7 🎯 ? (H)
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		Omnichannel Agent Dashboard ∨		
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Step	Action		
Step 1	From the Solidigm portal page, select the tile for Dynamics CIM		
	called Omnichannel for Customer Service.		
Step 2	Start at the Customer Service Agent, default dashboard. Make this		
	your default dashboard.		
Step 3	Click on the "+" at the top of the screen to access a dropdown menu:		
	Dashboards, Omnichannel Historical Analytics, Accounts, Contacts,		
	Cases, Knowledgebase Articles, Queues, and Activities.		

Claiming a Case

Dynamics 365	Omnic	nannel for Customer Service	₽ Search			Q	+ 7 @	
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		Drive doesn't work	CAS-01823-R0Q8 ARC	Warranty High	Active: Investigati	Social	7/29/2022 12:39	e.
		"the drive doesn't show or mount on a compu	ti CAS-34476-G0X4 Ekkachai Thammawat.	Technical Medium	Active: Investigati	Web	8/11/2022 5:59 AM	Λ
		#540575 Vk Добрый день. Меня ин	CAS-35024-Y5Q9Z8 Evgeny Kogut	Technical Medium	Active: Investigati	Social	8/11/2022 6:11 AM	1
		[Dell]P41 thermal throttles	CAS-75460-X6N4J6 DELL	Technical	Active: Waiting fo		8/11/2022 9:59 PM	1
		#1068973 Facebook xin chào	CAS-96700-K5J0T3 Quy Pham	Technical Medium	Active: Investigati	Social	8/12/2022 9:10 AM	1
		<u>All</u> # A B C D E	F G H I J K L	M N O P Q	R S T	u v	W X Y	z
		1 - 6 of 32					re e Page 1	7
		Queue Item Associated View $ \sim$			C	Refresh	See all records	÷
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		✓ Title ∨	Entered Queue $\downarrow ~~ \lor$	Type ∨ Queue ∨		Worked By \vee		
		RE: New Case Raised	9/23/2022 7:41 AM	Email Solidigm	Support			
		Automatic reply: New Case Raised	9/23/2022 7:29 AM	Email Solidigm	Support			
		Your mailbox is now connected to Dynamics 3	65 9/23/2022 5:33 AM	Email Solidigm	Support NonProd			

Step	Action	
Step 1	Navigate to your default dashboard.	
Step 2	Scroll down to the Cases Available to Work On window.	
Step 3	Search within this window for a particular case, or	
	select a case from the list to add it to your cases	

Create a Case

Dynamics 365	Omnichannel for Customer Service	,O Search	1					+ 7 @ ?
	# Customer Service A & Cases My Active Cases	× +						
Home	🗧 🖾 Show Chart 🕂 New Case 📋 Delete	∨ 🖒 Refresh [🖻 Run Report \vee 🛛 🔀	Email a Link >	🖉 🖾 Flow 🗸	🕮 Excel Templates \vee	Export to	Excel \vee :
	My Active Cases \vee	R				🖽 Edit columns 🛛 🍸 E	dit filters	Search this view
	⊖ Case Title ∽	Case Number ~	Customer ~	Case Type ~	Priority ~	Status Reason ~	Origin ~	Created On \uparrow \checkmark
	Drive doesn't work	CAS-01823-R0Q8V6	ARC	Warranty	High	Active: Investiga	Social	7/29/2022 12:39 AM
	"the drive doesn't show or mount on a com	CAS-34476-G0X4V4	Ekkachai Thamma	Technical	Medium	Active: Investiga	Web	8/11/2022 5:59 AM
	#540575 Vk Добрый день. Меня ин	CAS-35024-Y5Q9Z8	Evgeny Kogut	Technical	Medium	Active: Investiga	Social	8/11/2022 6:11 AM
	[Dell]P41 thermal throttles	CAS-75460-X6N4J6	DELL	Technical		Active: Waiting f		8/11/2022 9:59 PM
	#1068973 Facebook xin chào	CAS-96700-K5J0T3	Quy Pham	Technical	Medium	Active: Investiga	Social	8/12/2022 9:10 AM
	[DHL] AWR//ISN PHYS731501971P9DGN//	CAS-130926-J8T1V1	True System	Warranty	Medium	Active: Investiga	Web	8/15/2022 12:55 AM
	(RMA Request Intel 20-04-2021)	CAS-131145-M2W	Hypertechnologie	Warranty	Medium	Active: Investiga	Email	8/15/2022 1:00 AM
	[DHL] No es detectado por el equipo, prese	CAS-131199-K8J4Y4	Sat Sib	Warranty	Medium	Active: Investiga	Web	8/15/2022 1:02 AM
	535 SSD cannot be detected	CAS-131622-B4R1	Huai-wei wang	Warranty	Medium	Active: Investiga	Phone	8/15/2022 1:13 AM
	535 SSD cannot be detected	CAS-132793-M6J1	Ts Cang	Warranty	Medium	Active: Investiga	Web	8/15/2022 1:41 AM
	Technical Issue with SSD	CAS-133873-W8Q	ARC	Technical		Active: Investiga		8/17/2022 5:03 PM
	Documentation Case	CAS-133880-J3W4	Padmini Mamidanna	Document		Active: Investiga		8/18/2022 12:37 AM
	Technical Case	CAS-133881-S8Z8	Padmini Mamidanna	Technical		Active: Investiga		8/18/2022 12:40 AM
	Warranty Case	CAS-133882-V9K5	Padmini Mamidanna	Warranty		Active: Investiga		8/18/2022 12:43 AM
	SSD inquiry	CAS-133935-R7V5	Vanesa Teh	Technical		Active: New	Custom	8/18/2022 10:17 PM

Step	Action
Step 1	Select + New Case to create a new case.
Step 2	Fill out all available pertinent information
Step 3	If the case involves an existing customer, search for them in the customer field
Step 4	If the case is for a new customer, click + New Record in the customer dropdown menu and fill out the Quick Create : Contact fields to add the new customer.
Step 5	Click Save to create the case. Once you click Save , the case number will be automatically populated.
Note:	There are three Case Types: Documentation, Technical and Warranty. The Case Type you select will then determine the Case Categories available to choose from.

The Identify Stage

Dynamics 365	Omnichannel for Customer Service		Q + ∀ @ ?
	SSD Won't Mount to Computer +		
Home	← 🗟 Save 🗳 Save & Close 」→ Save & Route 🔾 Refree	sh 🕂 New 🖸 Resolve Case 🗋 Cancel Case 🔗 Assign	Add to Queue I Queue Item Details :
SSD Won't Mount to	SSD Won't Mount to Computer - Saved Case - B2C Case ~		L1 Technical Case Queue Status Reason Assignee
	NAND: Case - B2C Case Active for 52 minutes	IDENTIFY (52 Min)	INVESTIGATE
	Summary Details Product Details Attachments Tim	neline Serial Number Administration Related	
	CASE OVERVIEW	CUSTOMER DETAILS	SLA TIMER
	Case Title * SSD Won't Mount to Computer	≙ Email * amy.keller@arc.com ☞	SLA Timers Last update: 9/23/2022, 2:21:05 PM
	Case Number CIM-02089-R1H2W	A Phone Number	First Response Succeeded O Escalate to Spec 03d 19h
	Customer * 🕅 Amy Keller	A Language *	Resolve
	Priority	Country	200 190
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	Case Type * 🔀 Technical	REGIONAL DETAILS	$^{ m O}$ Known issues $\qquad \qquad \qquad$
	Case Category 🔀 Known issues	Originating Contact Center	4 Results found Sorted by Relevance American Airlines NUC handling 化, 다 D
	Case Issue	Target Contact Center	Company / CIM ID / Known ContactsProductsSpecial Handlin g InstructionsLast UpdatedPSE Contacts3X Logic CIM IDs: 133
	Troubleshooting Complete No	Geography	87676, 12113221, 11455602SSDsWarranty Cases related to 53 External Published
	Case Origin	Country	KA-01053 ∠3 0 · ⊙ 2 · 9/14/2022

Step	Action
Step 1	Click on the Product Details tab.
Step 2	Click on + New Case Products ; this opens the Quick Create: Case
	Products window.
Step 3	Search for the correct product and enter serial numbers and other
	product information. Multiple products may be added.
Step 4	If the case is for a new customer, click + New Record in the customer
	dropdown menu and fill out the Quick Create : Contact fields to add
	the new customer.
Step 5	Click Save to save the case.

The Investigate Stage

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≡ ŵ Home		h 🕂 New 🖸 Resolve Case 📑 Cancel Case 🔗 Assign	오 Add to Queue - 통 Queue Item Details :
SSD Won't Mount to	SSD Won't Mount to Computer - Saved Case - B2C Case ~		L1 Technical Active: Investigating Leo Harris V Case Queue Status Reason Assignee
	NAND: Case - B2C Case Active for 3 hours	IDENTIFY	INVESTIGATE (16 Min)
	Summary Details Product Details Attachments Tim	eline Serial Number Administration Related	
	CASE OVERVIEW	CUSTOMER DETAILS	SLA TIMER
	Case Title * SSD Won't Mount to Computer	≙ Email * amy.keller@arc.com ☞	SLA Timers Last update: 9/23/2022, 4:38:07 PM
	Case Number CIM-02089-R1H2W	A Phone Number	First Response Succeeded O3d 17h
	Customer R Amy Keller	A Language *	Resolve 20d 17h
	Priority	Country	
	Language * 📴 French	Customer Sentiment Satisfied	KNOWLEDGE
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	Case Type Technical	REGIONAL DETAILS	,○ Known issues ×
	Case Category 🔀 Known issues	Originating Contact Center	4 Results found Sorted by Relevance American Airlines NUC handling ℓ _a □ □
	Case Issue	Target Contact Center	Company / CIM ID / Known ContactsProductsSpecial Handlin g InstructionsLast UpdatedPSE Contacts3X Logic CIM IDs: 133
	Troubleshooting Complete No	Geography	87676, 12113221, 11455602SSDsWarranty Cases related to 53 External Published
	Case Origin	Country	KA-01053 △ 0 · ⊙ 2 · 9/14/2022

Step	Action
Step 1	Click on the Summary tab to check that the Case Category and Case Issue have been properly identified.
Step 2	Troubleshoot the case with Knowledge Articles.
Step 3	Knowledge articles tagged as External can be emailed directly to the customer.
Step 4	Knowledge Articles that you send to a customer will be linked to the case. Linked Knowledge articles should only be unlinked from a case if the customer indicates that the knowledge article was not helpful.

Appointments

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≡ ŵ Home	 ♂ SSD Won't Mount to Computer + ← I Save 월 Save & Close J² Save & Route ○ Refin 	esh 🕂 New 🖪 Resolve Case 🗋 Cancel Case 🙈 Assign	오 Add to Queue 厚 Queue Item Details :
SSD Won't Mount to	SSD Won't Mount to Computer - Saved Case - B2C Case ~		L1 Technical Active: Investigating Leo Harris V Case Queue Status Reason Assignee
	NAND: Case - B2C Case Active for 3 days	IDENTIFY	INVESTIGATE (18 Min)
	Summary Details Product Details Attachments Ti	meline Serial Number Administration Related	
	CASE OVERVIEW	CUSTOMER DETAILS	SLA TIMER
	Case Title * SSD Won't Mount to Computer	A Email * amy.keller@arc.com ☞	SLA Timers Last update: 9/26/2022, 3:40:14 PM
	Case Number CIM-02089-R1H2W	A Phone Number	First Response Succeeded Escalate to Spec 18h:19m
	Customer * 🔯 Amy Keller	Anguage *	Nesolve 17d 18h
	Priority		
	Language * 🖾 French	Customer Sentiment Satisfied	KNOWLEDGE
	A Care Tune I M Technical		∇ †↓
	A Case Category 🖾 Known issues	Originating Contact	Known issues A Results found Sorted by Relevance
	Case Issue 🔀 Channel hang issue / inter	Center Target Contact Center	American Airlines NUC handling 4 C Company / CIM ID / Known ContactsProductsSpecial Handlin
	Troubleshooting Complete No	Geography	g InstructionsLast UpdatedPSE Contacts3X Logic CIM IDs: 133 87676, 12113221, 11455602SSDsWarranty Cases related to 53 External Published
	Case Origin	Country	KA-01053 <u>0</u> 0 + √0 2 + 9/14/2022 ① No other matches found in this article

Step	Action
Step 1	Create appointments from the case in which you are working.
Step 2	Within the Accounts, Contacts or Cases view, navigate to the
	Timeline within that view and, in the Timeline window, click the plus
	"+" symbol. Click Appointment .
Step 3	Click Save and Close to create the appointment and send an
	invitation via email to all of the attendees you have added to the
	appointment.
Step 4	View all of <i>your</i> appointments by clicking on Appointments on the
	left-hand side of the main dashboard. Your appointments can be
	filtered by due date or advanced filter options.

Tasks

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SSD Won't Mount to	SSD Won't Mount to Computer - Saved Case + B2C Case \lor		L1 Technical Case Queue Status Reason Assignee		
	NAND: Case - B2C Case Active for 3 days	IDENTIFY	INVESTIGATE (29 Min)		
	Summary Details Product Details Attachments T	imeline Serial Number Administration Related			
	CASE OVERVIEW	CUSTOMER DETAILS	SLA TIMER		
	Case Title * SSD Won't Mount to Computer	A Email * amy.keller@arc.com ☞	SLA Timers Last update: 9/26/2022, 3:50:11 PM		
	CIM-02089-R1H2W	A Phone Number	First Response Succeeded Escalate to Spec		
	Customer * 🕅 Amy Keller	A Language *	Resolve		
	Priority	Country	1/d 18h		
	Language * 🖾 French	Customer Sentiment Satisfied	KNOWLEDGE		
			NOWLEDGE ▼ 1↓		
	Case Type * 🖾 Technical	REGIONAL DETAILS	\wp Known issues $\qquad \qquad \qquad$		
	A Case Category 🔀 Known issues	Originating Contact Center	4 Results found Sorted by Relevance		
	Case Issue 🖾 Channel hang issue / inter	Target Contact Center	Company / CIM ID / Known ContactsProductsSpecial Handlin a InstructionsLast UpdatedPSE Contacts3X Logic CIM IDs: 133		
	Troubleshooting Complete No	Geography	87676, 12113221, 11455602SSDsWarranty Cases related to 53 External Published		
	Case Origin	Country	KA-01053 ご 0・ つ 2・ 9/14/2022		

Step	Action	
Step 1	Create tasks from the case in which you are working. From the	
	Timeline of the Case, Account or Contact, click the plus "+" symbol.	
	This opens the Quick Create: Task window.	
Step 2	By default, you will be the owner of the task, but you can also assign	
	tasks to others.	
Step 3	Filling in a Due Date for your task is highly recommended.	
Step 4	Click Save and Close to create the task.	
Step 5	My Tasks displays a list of all your tasks. Your tasks can be filtered by	
	due date.	

Assign a Case to a Queue

Dynamics 365 Omnichannel for Customer S	ervice	₽ Search	Q + ∇ @ ?
 	Computer + ve & Close J* Save & Route 🖒 Refres	h 🕂 New 🖪 Resolve Case 🗋 Cancel Case 🙈 Assign	n 🚨 Add to Queue 🖶 Queue Item Details 🗄
SSD Won't Mount to Customer Service Age	nt to Computer - Saved		L1 Technical Active: Investigating Leo Harris Case Queue Status Reason Assignee
ustomer Service Age Active for 3 days	*** <	IDENTIFY	INVESTIGATE (1 Hrs)
Summary Details	Product Details Attachments Time	eline Serial Number Administration Related	
CASE OVERVIEW		CUSTOMER DETAILS	SLA TIMER
Case Title	* SSD Won't Mount to Computer	🛆 Email * amy.keller@arc.com 🖾	SLA Timers Last update: 9/26/2022, 4:23:02 PM
🔒 Case Number	CIM-02089-R1H2W	🛱 Phone Number 🛛	First Response Succeeded 17h:36m
Customer	* 🕅 Amy Keller	🛆 Language 🔹	Resolve
Priority		🛆 Country	17d 17h
Language	* 🖾 French	Customer Sentiment Satisfied	
			KNOWLEDGE ▽ ↑↓
🔒 Case Type	* 🐼 Technical	REGIONAL DETAILS	\wp Known issues \times
A Case Category	🔀 Known issues	Originating Contact Center	4 Results found Sorted by Relevance American Airlines NUC handling 化, 다 더
Case Issue	Channel hang issue / inter	Target Contact Center	Company / CIM ID / Known ContactsProductsSpecial Handlin g InstructionsLast UpdatedPSE Contacts3X Logic CIM IDs: 133
Troubleshooting Complete	No	Geography	87676, 12113221, 11455602SSDsWarranty Cases related to 53 External Published
Case Origin		Country	KA-01053

Step	Action
Step 1	Click on the Add to Queue button.
Step 2	Select the queue where you would like to assign the case. Click Add.

Resolve a Case

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	# Customer Service Agent Dash +				
Home	\leftarrow 🛛 Save As $+$ New \vee $ imes$ Clear Default	🕐 Refresh All			
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	My Active Cases \checkmark			+ New Case 🗎 Dele	te ∨ ♡ Refresh :
					Search this view
	✓ Case Title ∨	Case Number \lor Customer \lor	Case Type \checkmark $ $ Priority \checkmark	\mid Status Reason \lor \mid Origin \lor	\mid Created On † \sim
	Drive doesn't work	CAS-01823-R0Q8 ARC	Warranty High	Active: Investigati Social	7/29/2022 12:39
	"the drive doesn't show or mount on a compu	iti CAS-34476-G0X4 Ekkachai Thammawat	Technical Medium	Active: Investigati Web	8/11/2022 5:59 AM
	#540575 Vk Добрый день. Меня ин	CAS-35024-Y5Q9Z8 Evgeny Kogut	Technical Medium	Active: Investigati Social	8/11/2022 6:11 AM
	[Dell]P41 thermal throttles	CAS-75460-X6N4J6 DELL	Technical	Active: Waiting fo	8/11/2022 9:59 PM
	#1068973 Facebook xin chào	CAS-96700-K5J0T3 Quy Pham	Technical Medium	Active: Investigati Social	8/12/2022 9:10 AM
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	1 - 6 of 35				\leftarrow Page 1 \rightarrow
	Cases Available to Work On \checkmark			🔿 Refresi	n 🖷 See all records 🗄
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	\checkmark Title \checkmark	Entered Queue $\downarrow ~~\checkmark$	Queue 🗸	\mid Worked By \backsim	
	Technical Case	8/18/2022 12:40 AM	<leo harris=""></leo>		
	Documentation Case	8/18/2022 12:37 AM	<leo harris=""></leo>		

Step	Action	
Step 1	Navigate to Cases on left-hand side of screen in the Omnichannel	
	Customer Service App.	
Step 2	Select the required case from My Active Cases.	
Step 3	Click on the Resolve Case button.	
Step 4	In the Case Resolution pop-up which appears, add all required	
	details. Click Save and Close.	

Submit a Knowledge Base Article

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	# Customer Service Agent Dash +					
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	Customer Service Agent Dashboard	d ~				
	My Active Cases \sim			+ New Case 🗎 I	Delete 🗸 🖒 Refresh	1
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	\checkmark Case Title \lor	Case Number \lor Customer \lor	Case Type \checkmark Priority \checkmark	Status Reason ∽ Origi	n \checkmark Created On \uparrow \checkmark	
	Drive doesn't work	CAS-01823-R0Q8 ARC	Warranty High	Active: Investigati Soci	al 7/29/2022 12:3	9
	"the drive doesn't show or mount on a co	mputi CAS-34476-G0X4 Ekkachai Thammawat	Technical Medium	Active: Investigati Web	8/11/2022 5:59	AM
	#540575 Vk Добрый день. Меня ин	CAS-35024-Y5Q9Z8 Evgeny Kogut	Technical Medium	Active: Investigati Soci	al 8/11/2022 6:11	AM
	[Dell]P41 thermal throttles	CAS-75460-X6N4J6 DELL	Technical	Active: Waiting fo	8/11/2022 9:59	PM
	#1068973 Facebook xin chảo	CAS-96700-K5J0T3 Quy Pham	Technical Medium	Active: Investigati Soci	al 8/12/2022 9:10	AM
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	1 - 6 of 35				← ← Page 1	1 →
	Cases Available to Work On ${\scriptstyle\bigtriangledown}$			🖒 Ref	iresh 🖷 See all records	
					Search this view	Q
	\checkmark Title \lor	Entered Queue \downarrow \checkmark	Queue 🗸	\mid Worked By \sim		
	Technical Case	8/18/2022 12:40 AM	<leo harris=""></leo>			
	Documentation Case	8/18/2022 12:37 AM	<leo harris=""></leo>			

Step	Action		
Step 1	Navigate to Knowledge Articles.		
Step 2	Select + New to create a new knowledge article.		
Step 3	Fill in all required fields and specify if this is to be an Internal Training		
	Article.		
Step 4	Click Save.		
Step 5	Click the Related Information tab and select Related Categories.		
	Select a category.		
Step 6	Click the Related Products icon and select Relate Product. Select an		
	existing product or create a new product.		
Step 7	Click the Author Stage in the business process flow and fill in all the		
	required fields. Click Next Stage .		



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