

A graphic element in the top left corner consisting of a black triangle pointing downwards and to the right, and a blue arrow pointing upwards and to the right, overlapping the black triangle.

prodware^{TP}

Prodware Fast Service
for Microsoft Dynamics 365
USER GUIDE – SET UP



Version Control	Prepared By:	Reviewed by:	Change
28/11/2018	Javier Lopez		Initial version
19/07/2019	Jeroen Paters		New version based on new UI
07/08/2019	Emma Bush		AppSource version

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This user document is valid for the Fast Service product *version 1.0* based on Dynamics 365 CE Unified Interface.

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1. INTRODUCTION

1.1 Application description

Fast Service is an SMB solution created by *Prodware* for Microsoft Dynamics 365 that provides such benefits as immediate deployment and streamlined Customer Service management functionalities.

Because it is developed on Microsoft Dynamics 365 for Customer Service, users benefit from market-leading customer service technology; plus as it is integrated with Office 365 apps, there is more agile management of daily working files, documents and emails for improved productivity and collaboration. For example, a user can download reports in Excel, generate documents in Word and receive emails directly in the application.

The tool, being designed to operate in the cloud, provides continuous updates with synchronized data and accessibility from anywhere and on any device.

1.2 Goal of application

Fast Service is a ready-to-use solution: it avoids time-consuming implementation processes with a fully standard solution. Fast Service gives small and medium businesses the agility they need to get up and running and improve customer service. The solution provides users with:

- > More visibility and control of the Customer Service activity
- > Greater standardization and agility in customer service processes
- > Improved customer service and customer satisfaction
- > All the information in a single platform
- > Access to customer information and incidents (Cases) from anywhere.
- > Share information across the organization
- > Better adoption; there are employees in all organizations that are not accustomed to working with new technologies. Fast Service is an easy and direct way to more effectively work and manage within customer service
- > Avoid the loss of information. For example, if a customer service agent leaves the organization, information about interactions and problems experienced with the customer is usually not stored anywhere or is forgotten in lost word or excel files among other files.

- > Ability to have dashboards to review the status of customer service with the possibility of filtering data by customer, agent, date, etc.

2. SETUP & INSTALLATION GUIDE

2.1 System requirements

Fast Service must be installed on Dynamics 365 CEM.

To be able to use this functionality your Dynamics 365 CEM license must be up to date. If necessary, contact your reseller for more information about your license.

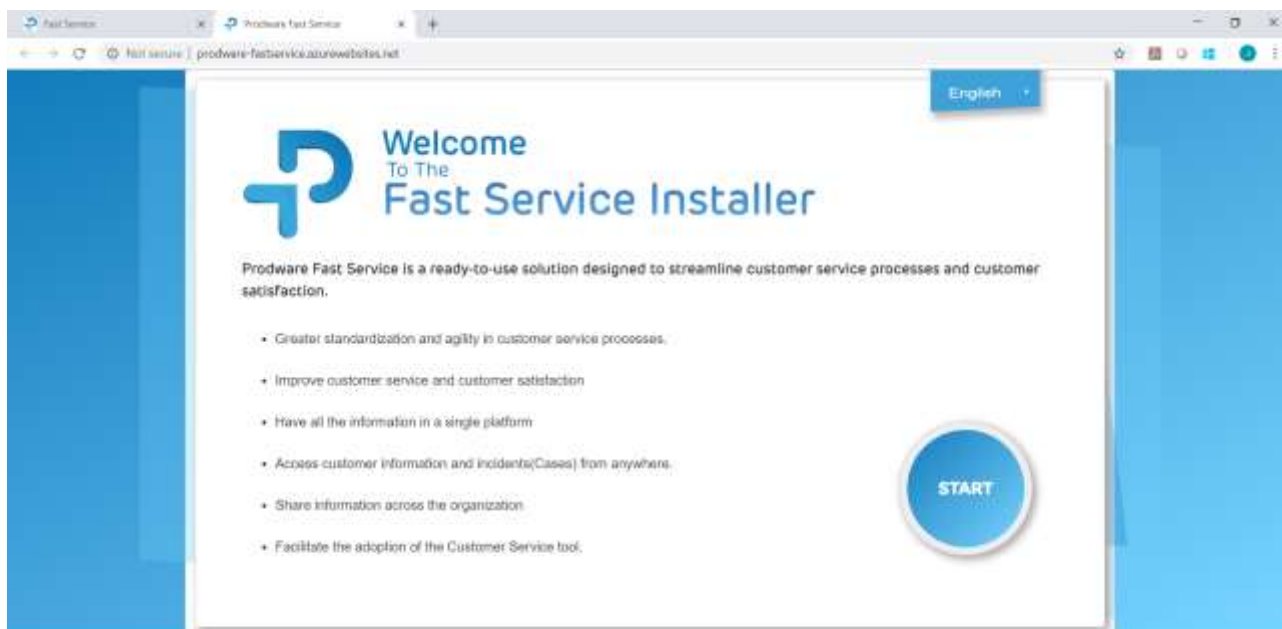
The product is also available for earlier versions. If you would like the package for another CRM version, the Consultant should contact the Sales Solution Specialist from the Innovation and Business Solution division at Prodware.

2.2 Installation

1. Go to Internet Browser (Chrome) and type this URL:

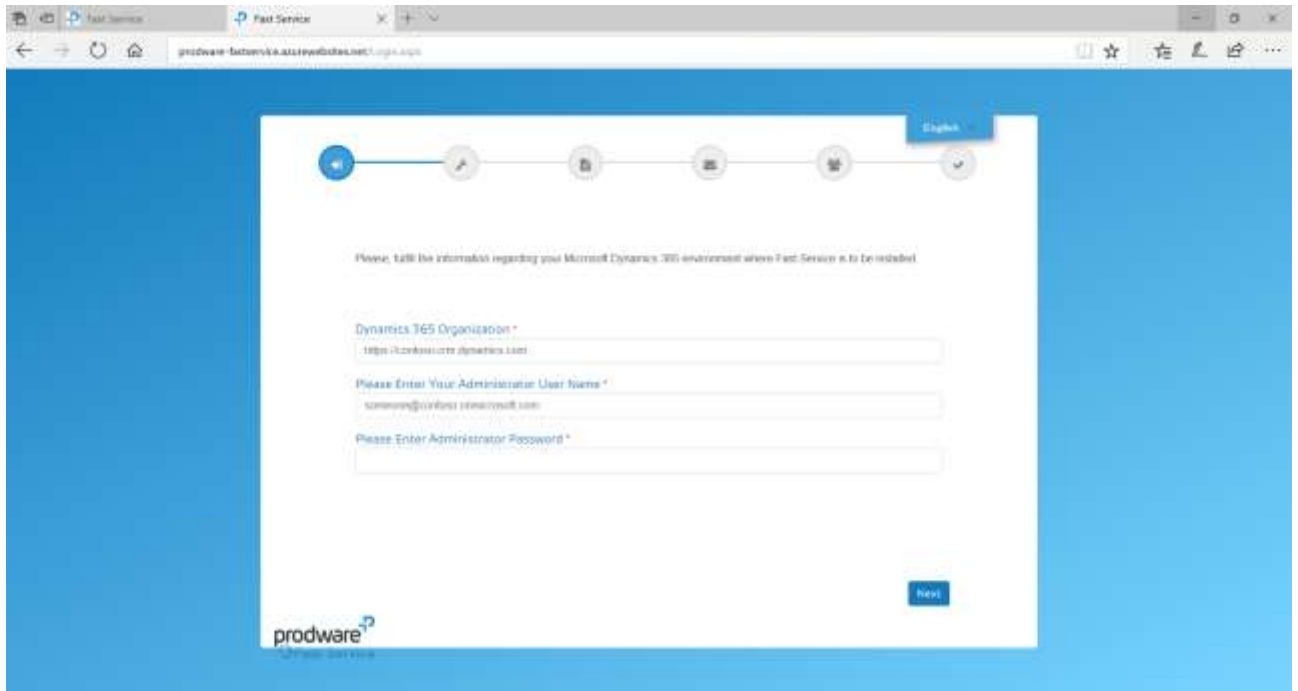
<http://prodware-fastservice.azurewebsites.net/>

A screen like the following will appear (Note: You can change the language of the installer):

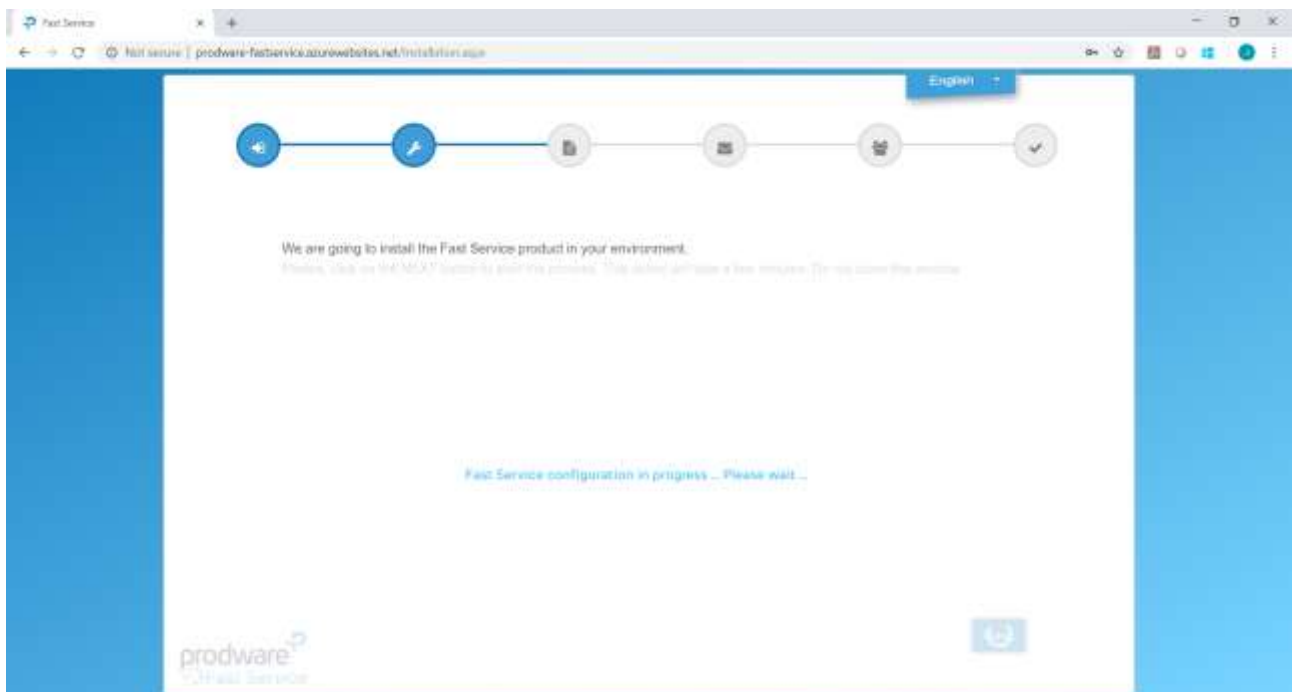


Click the Start button to continue.

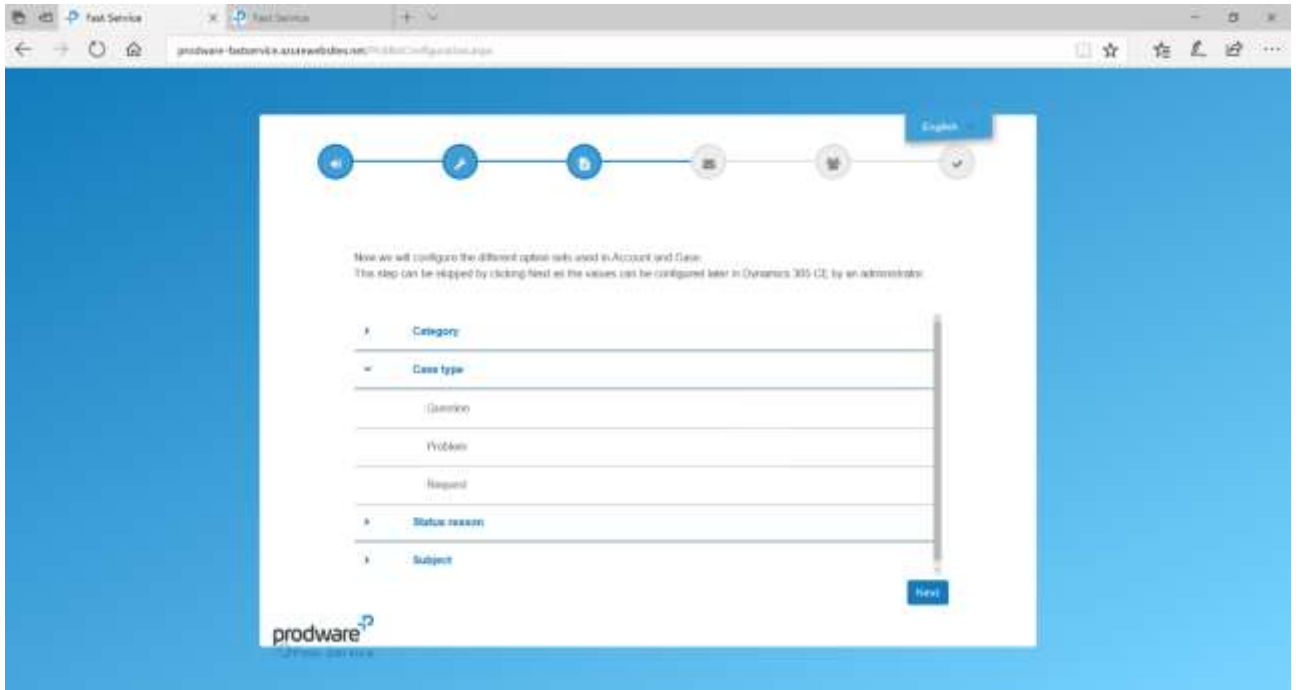
2. In the following screen insert the information of the URL of Dynamics 365 CE, as well as the user (must have administrator role) and the password.



3. On the next screen, read the displayed information and click the “Next” button



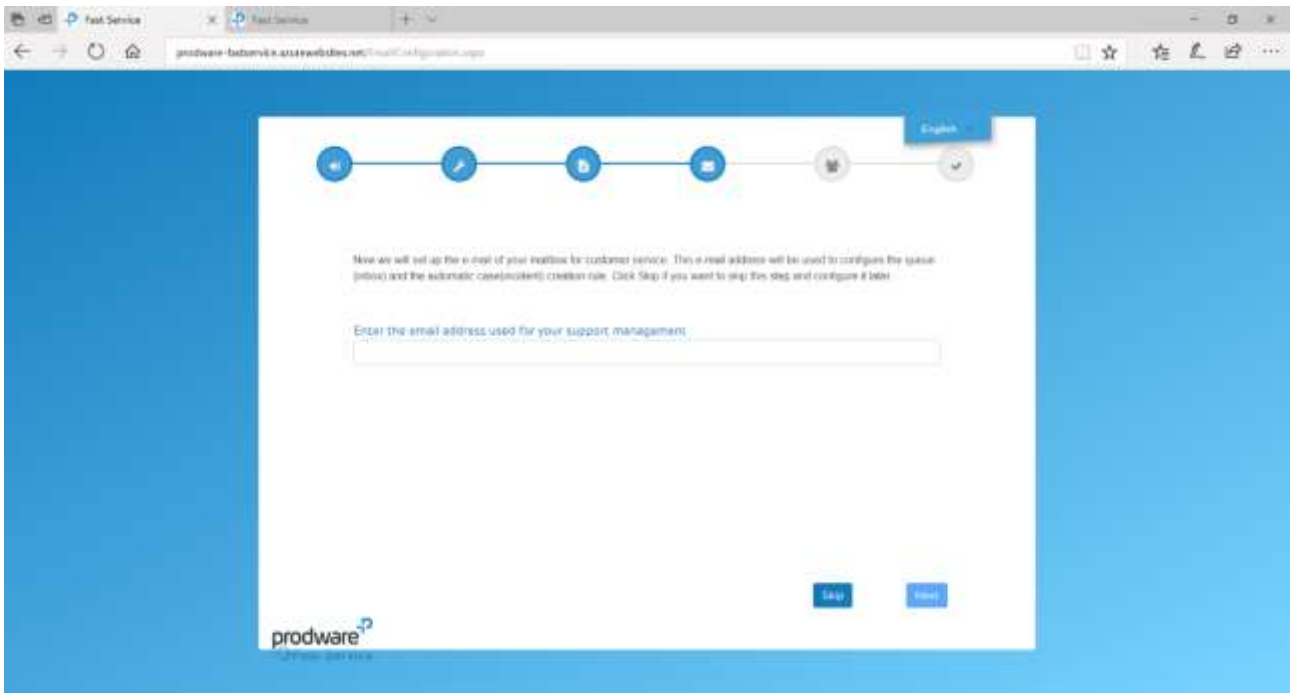
4. In the next screen, the different option sets used in the solution for Accounts and Cases can be updated.



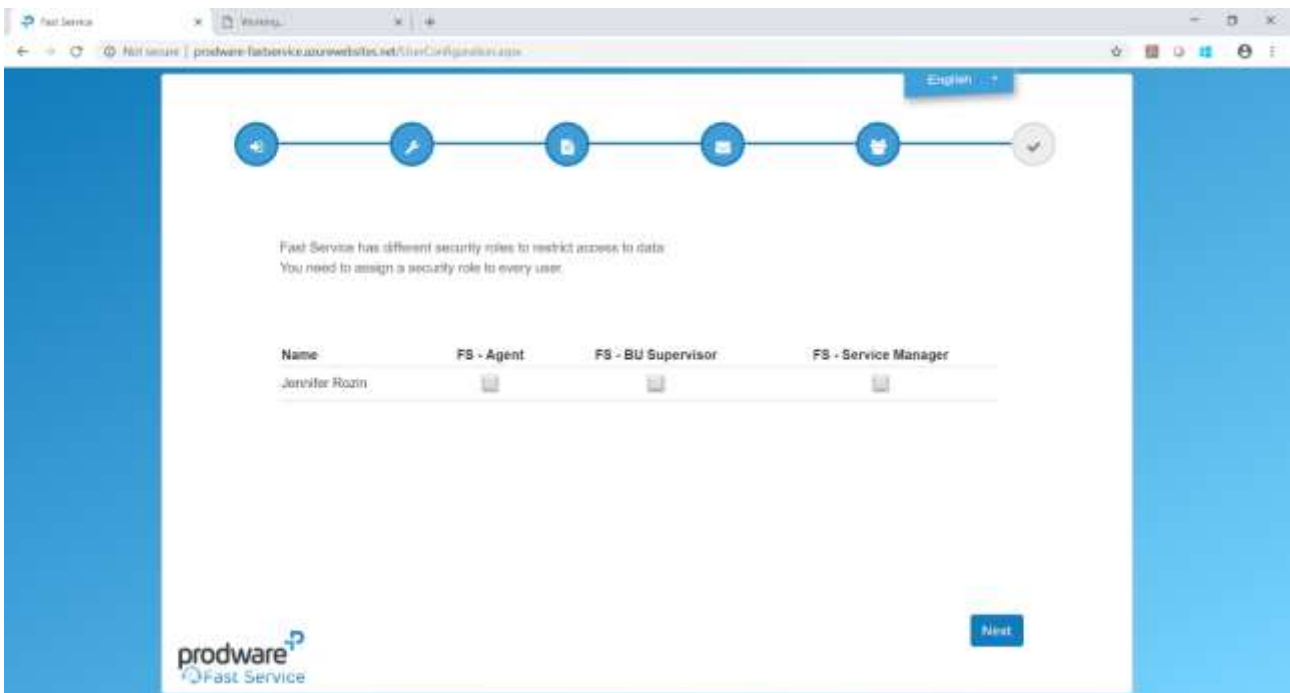
Click the blue arrows to check and edit default values. Then Click edit (pencil icon) to edit a value, or click + to add a new value.

This step can be skipped by clicking the Next button, as the values can be configured later in Dynamics 365 CE by an administrator.

5. On the next screen, the generic email corresponding with the Customer Service inbox must be specified. The email should be Office 365.

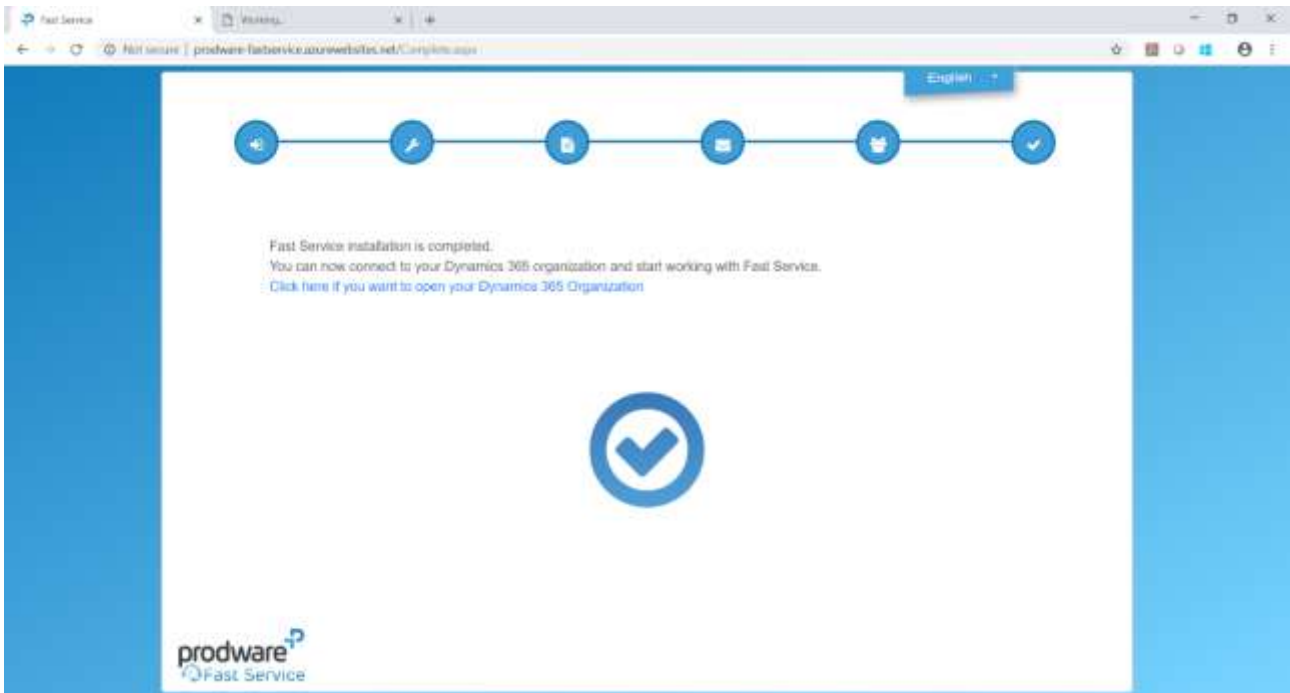


6. Next, add Customer Service roles to each user.



7. The installation is complete.

The installer can be launched any time if you skipped any step and you want to do it later on.



From the last screen, you can directly open Fast Service:

