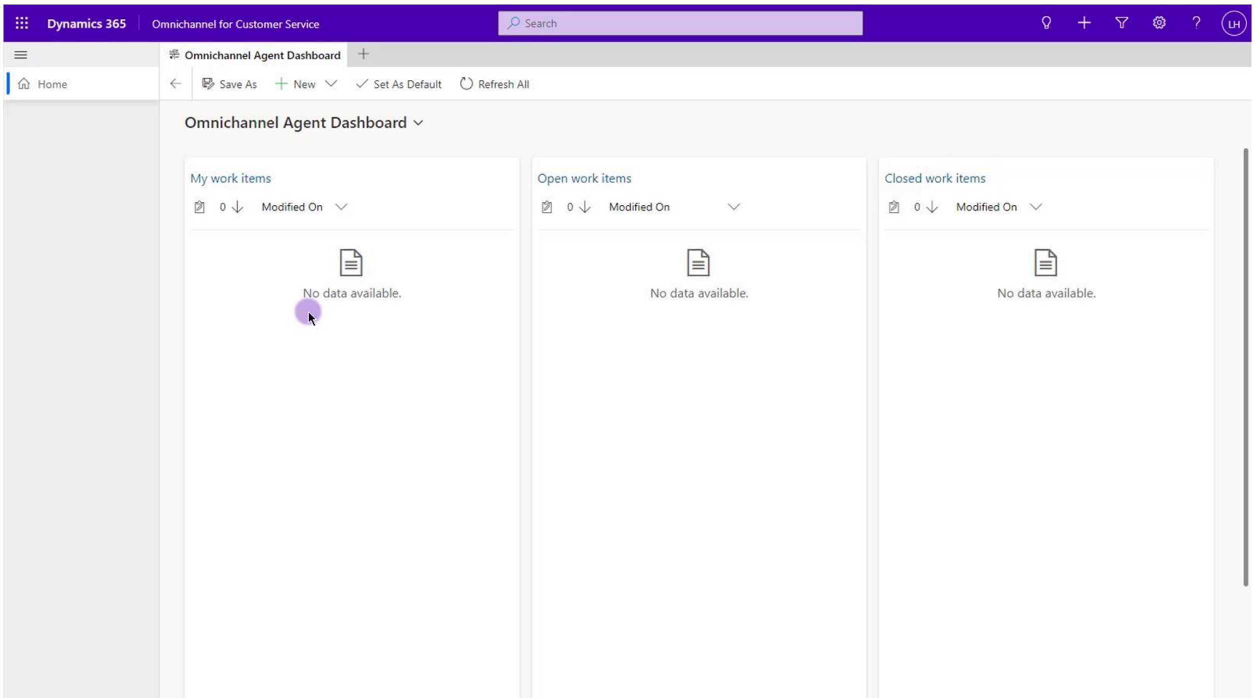
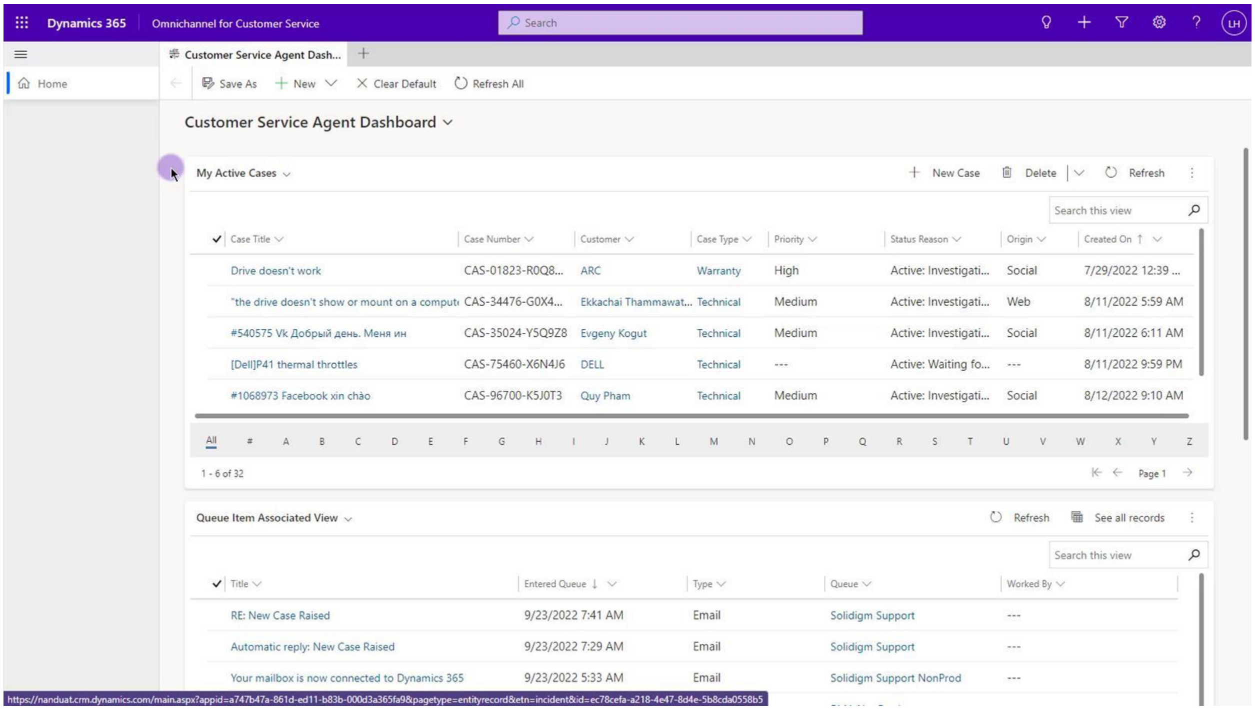
Navigate the Tool



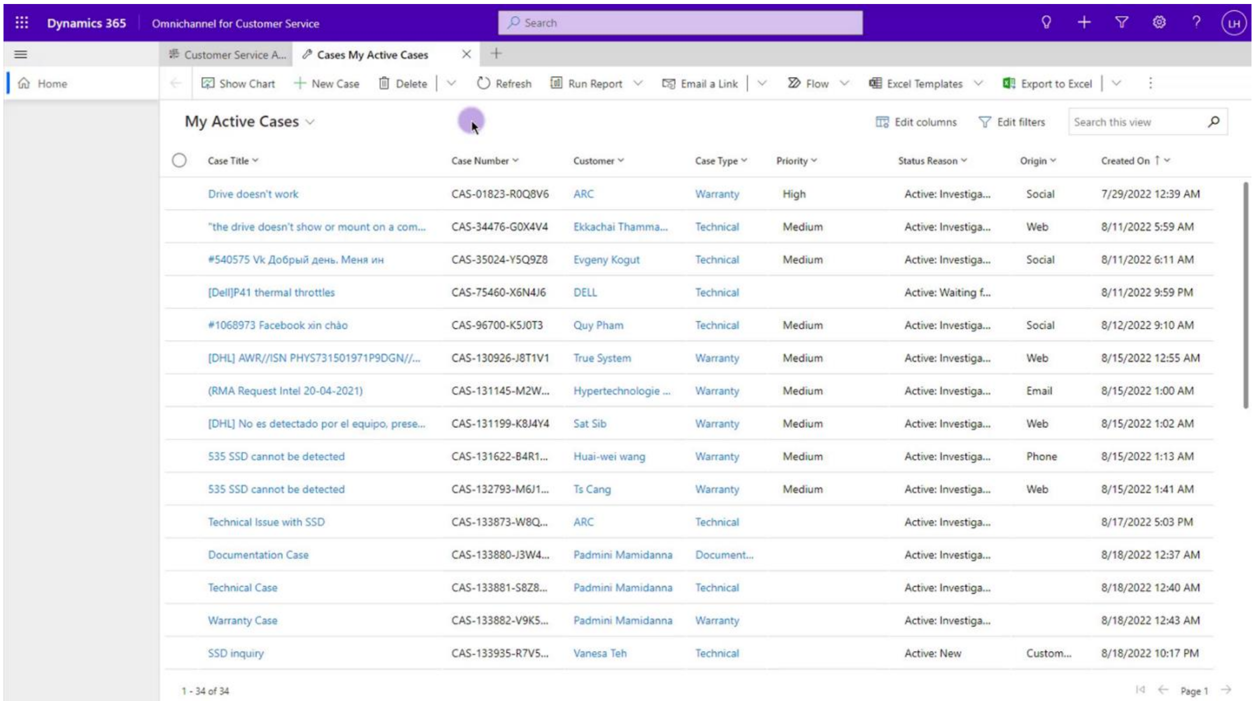
Step	Action
Step 1	From the Solidigm portal page, select the tile for Dynamics CIM called Omnichannel for Customer Service.
Step 2	Start at the Customer Service Agent, default dashboard. Make this your default dashboard.
Step 3	Click on the "+" at the top of the screen to access a dropdown menu: Dashboards, Omnichannel Historical Analytics, Accounts, Contacts, Cases, Knowledgebase Articles, Queues, and Activities.

Claiming a Case



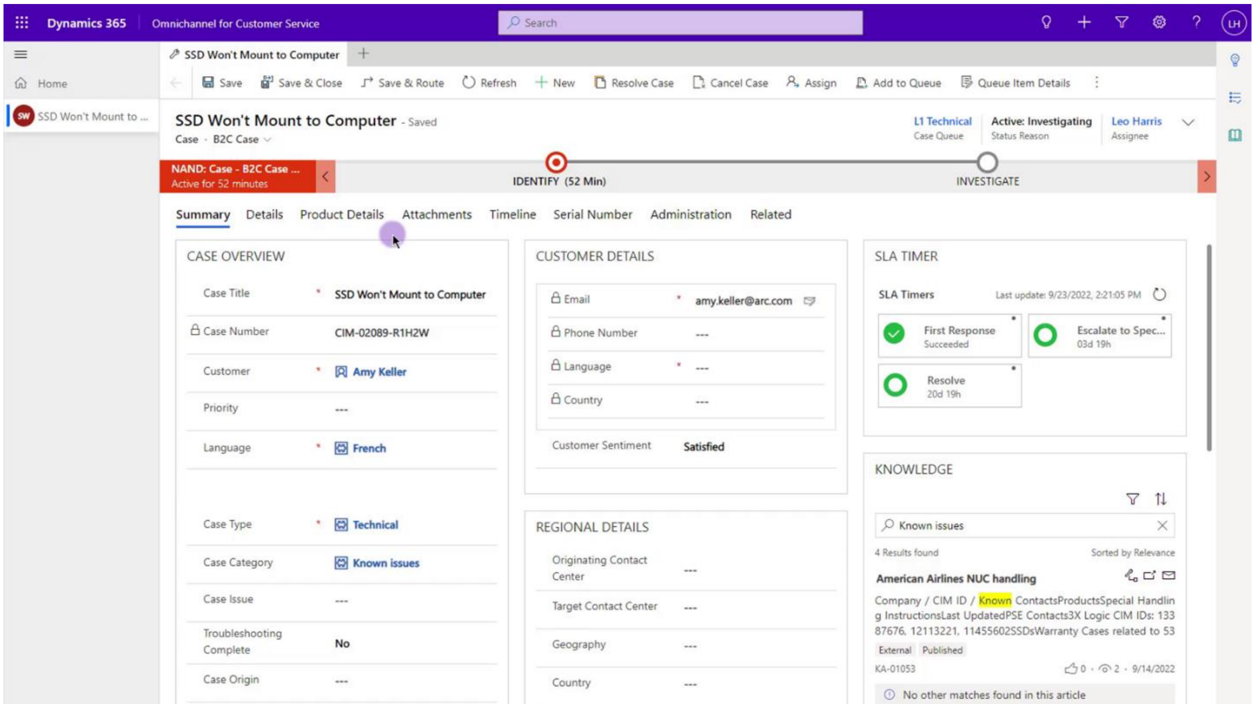
Step	Action
Step 1	Navigate to your default dashboard.
Step 2	Scroll down to the **Cases Available** to Work On window.
Step 3	Search within this window for a particular case, or select a case from the list to add it to your cases

Create a Case



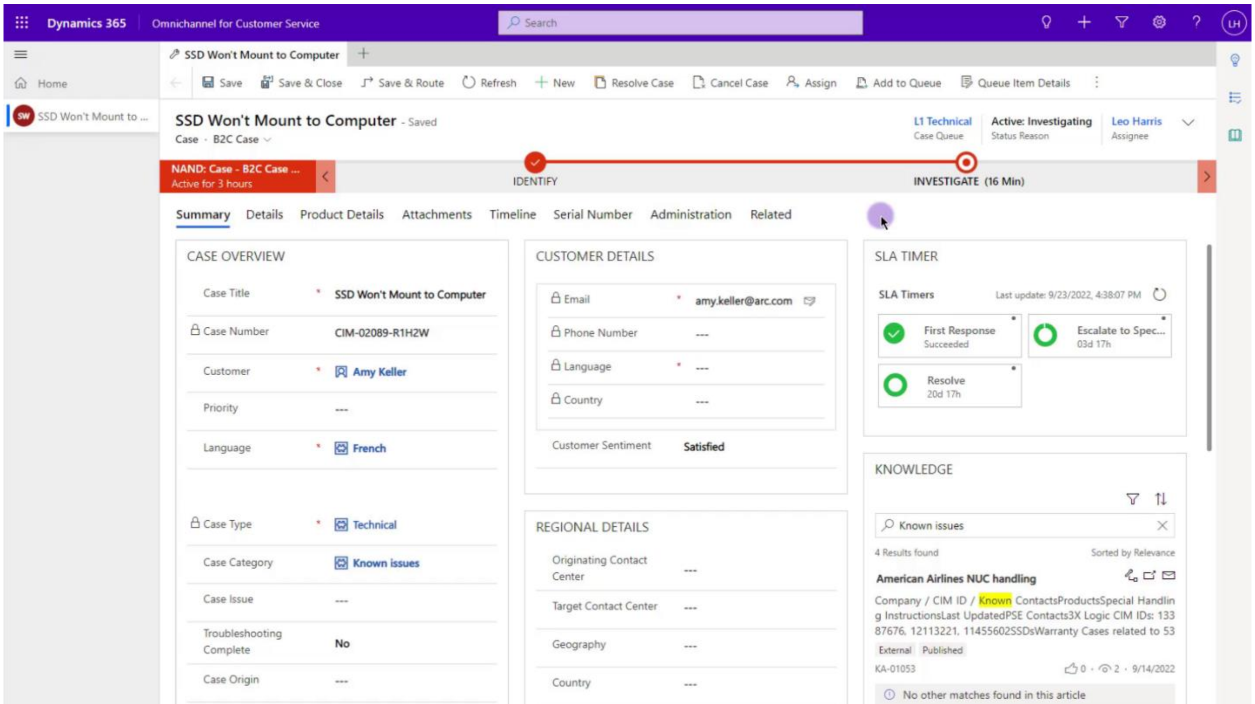
Step	Action
Step 1	Select **+ New Case** to create a new case.
Step 2	Fill out all available pertinent information
Step 3	If the case involves an existing customer, search for them in the customer field
Step 4	If the case is for a new customer, click **+ New Record** in the customer dropdown menu and 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



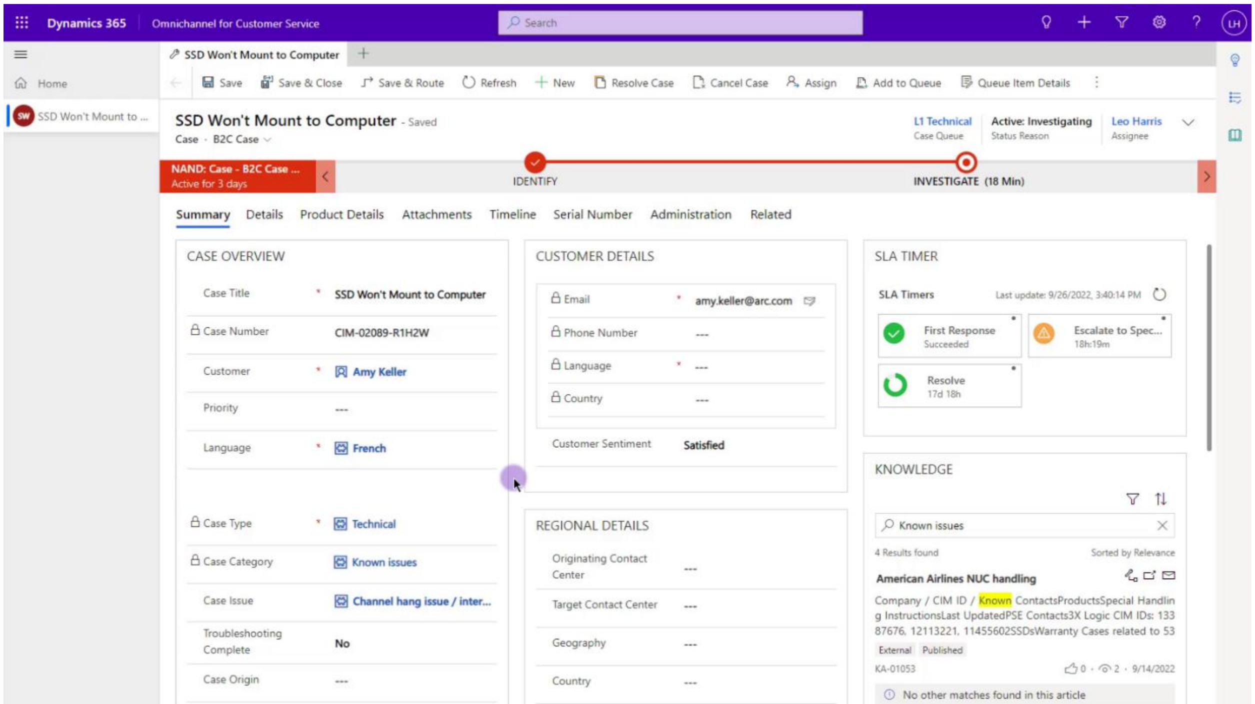
Step	Action
Step 1	Click on the **Product Details** tab.
Step 2	Click on **+ New Case Products**; this opens the Quick Create: Case Products window.
Step 3	Search for the correct product and enter serial numbers and other product information. Multiple products may be added.
Step 4	If the case is for 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



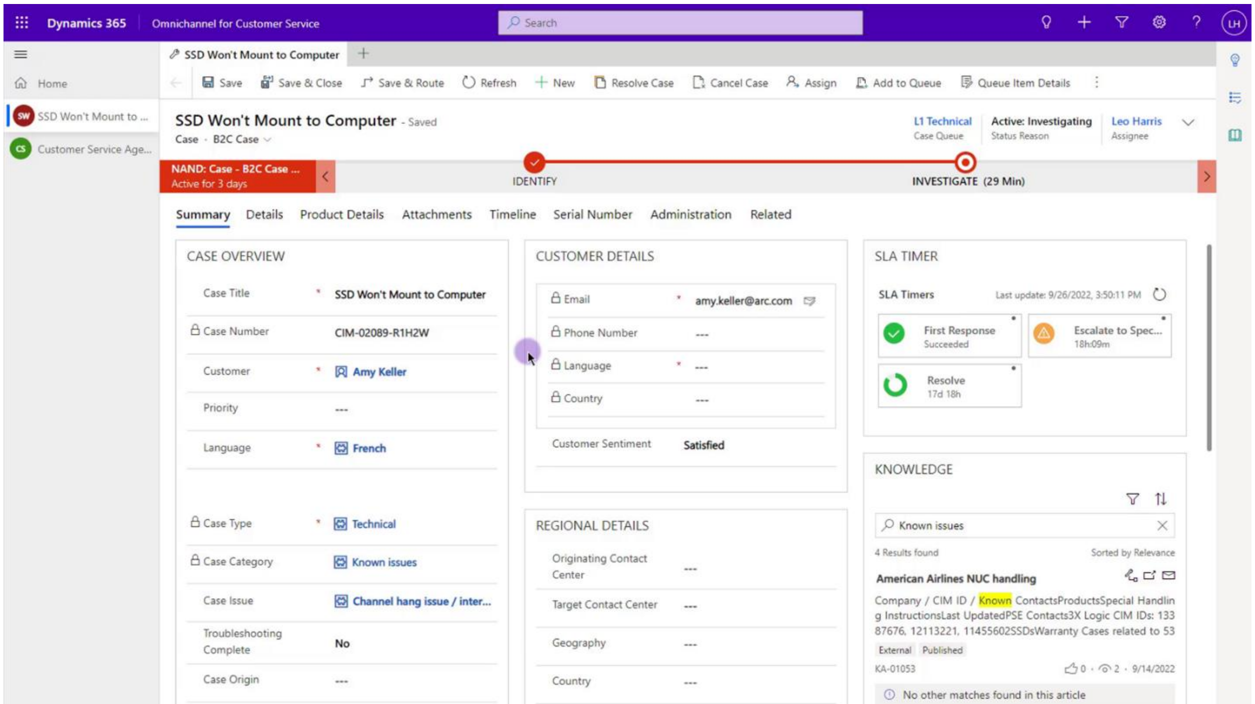
Step	Action
Step 1	Click on the **Summary** tab to check that the Case Category and Case Issue have been properly identified.
Step 2	Troubleshoot the case with Knowledge Articles.
Step 3	Knowledge articles tagged as External can be emailed directly to the customer.
Step 4	Knowledge Articles that you 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



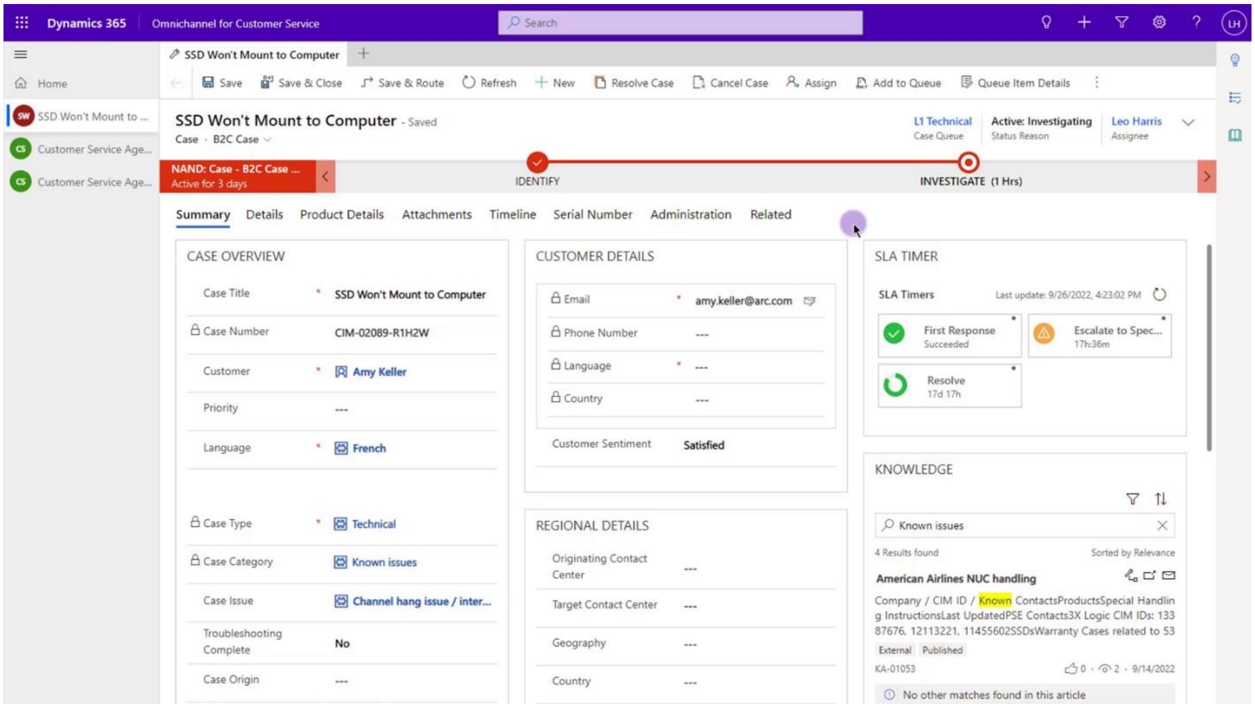
Step	Action
Step 1	Create appointments from the case in which you are working.
Step 2	Within the Accounts, Contacts or Cases view, navigate to the Timeline within that view and, in the Timeline window, click the plus "+" symbol. Click **Appointment**.
Step 3	Click **Save and Close** to create the appointment and send an invitation via email to all of the attendees you have added to the appointment.
Step 4	View all of *your* 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



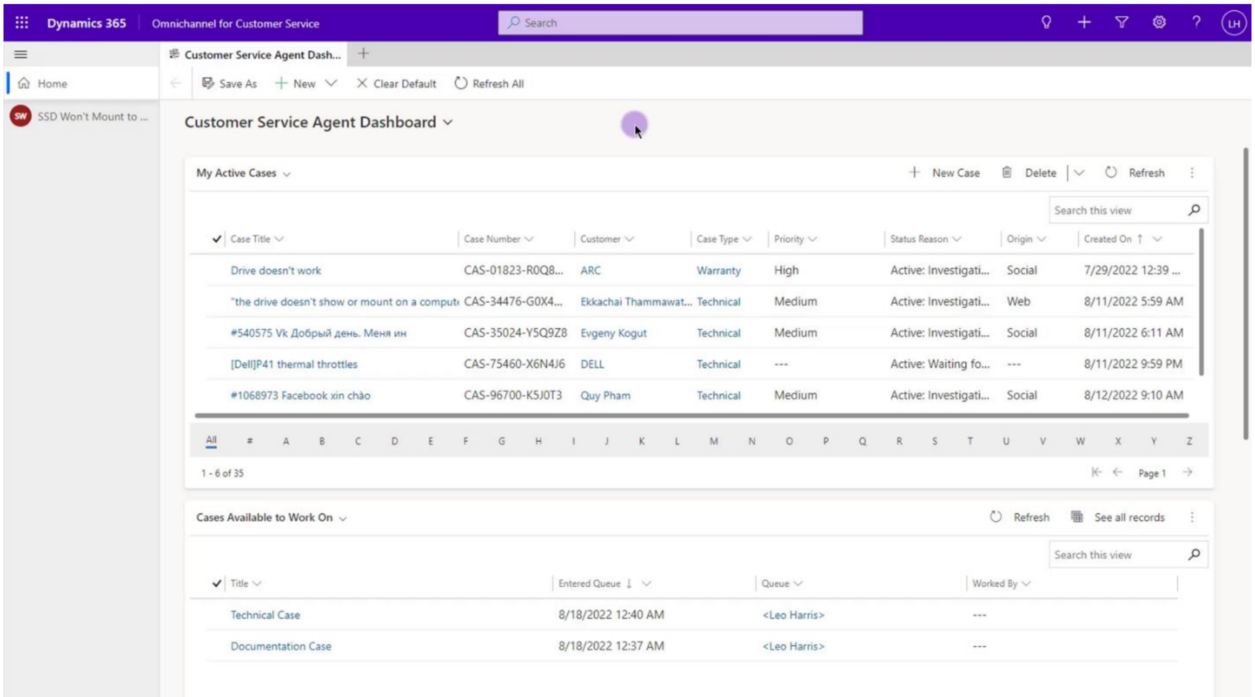
Step	Action
Step 1	Create tasks from the case in which you are working. From the Timeline of the Case, Account or Contact, click the plus "+" symbol. This opens the Quick Create: Task window.
Step 2	By default, you will be the owner of the task, but you can also assign tasks to others.
Step 3	Filling 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



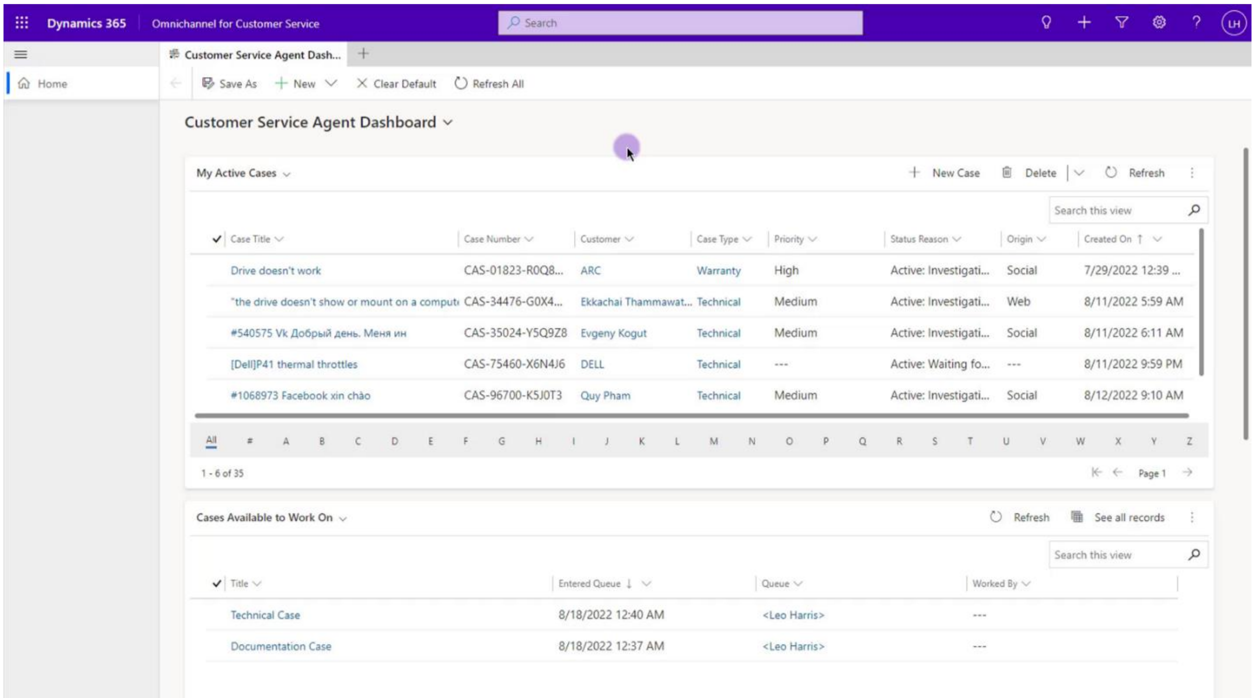
Step	Action
Step 1	Click on the Add to Queue button.
Step 2	Select the queue where you would like to assign the case. Click **Add**.

Resolve a Case



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



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**.