**Prerequisites for installing the Solution Package:**

* Dynamics 365 v 8.2.2.2114 online or above
* Voice of the Customer v 9.0.1188.3 or above
* Install VOC solution from Office 365 admin tenant using the below steps:
  + Go to **Admin centers** > **Dynamics 365**
  + Choose **Applications** tab, select **Voice of the Customer** then press **Manage**
  + Under **Dynamics 365 instances** choose the required instance to install VOC to it, then mark on **I Accept..** and press **Install**
  + You can track the installation process from **Dynamics 365 Administration Center**, **Instances** tab, Select desired instance and click on **Solutions** from the right side.
  + Track the Application installation status until **Status > “Installed”**

**After Deploying the package**

**Activating Survey System:**

* Open Settings > Voice of the Customer Imports, press on new then set the survey import name, in the “Survey Xml To Import” field past all the components from the “Survey.txt” attached file, then press on SAVE & CLOSE.
* Activate and Publish the Survey
* In case of any modifications needed in the survey it can be made from the “Designer” section inside the survey itself.

**Adjust Support Workflow:**

* Inside Dynamics 365, open Settings > processes, from “All Processes” open “Customer Support Workflow” process, at the top choose “Order Process Flow” and move “Customer Support Workflow” to the top of processes, then press Update.

**Adjust Automated Mails:**

* Open Settings > Processes, open process “Auto-Reply Ticket Opened”, edit the two steps titled “Ticket Created Client Confirmation” & “Support Team Notification”, Adjust the sender in both and for the second one adjust the “sent to” mail with the Support Team/Agent alias. Then save and activate the process.
* Open process “Auto-Reply Ticket Closed”, edit the step titled “Closure Team Confirmation” to adjust the sender mail, also adjust the sent to mail with the Support Team/Agent alias. Then edit the two steps titled “Closure Client Confirmation” & “Sending Survey” to adjust the sender mail. Then save and activate the process.

**Set Working Hours & Public Holidays:**

* For Public Holidays: Open Settings > Service Management > Holiday Schedule, Click on New, Set the name for the Public Holidays schedule, click on it then start adding public holidays by pressing on “New” and setting Name, Date & Duration for each holiday.
* For Working Hours: Open Settings > Service Management > Customer Service Schedule, click on New, set the name for the working hours’ schedule, under “Weekly Schedule” set the weekly working hours and off-work days.
* Beside “Holiday Schedule” clock on Observe and from the Lookup field choose the previously set Public Holidays schedule.
* Then Click on Save & Close.

**Adjust SLA timers & Notifications:**

* Open Settings > Service Management > Service Level Agreements, click on “Support SLA” SLA, under the “SLA details” section you can find all the SLA conditions, this table shows the name of each condition and the Warning & Failure timers. Click on each condition to adjust its failure time under “SLA item Failure” and its warning time under “SLA Item Warning”.

*The SLA failure/warning time is calculated according to the real amount of working hours.*



* Click on each condition under the “SLA Details” section and for every “Send Email” action click on “set properties” button beside and set the sender mail, also adjust the sent to mail with the Support Team/Agent alias. *(after setting the correct mails make sure that the red cross beside the sent Email action disappeared)*.
* Beside “Business Hours” title in the SLA form choose the previously set working hours’ schedule.
* After finishing all the conditions and setting the working hours, click on “Activate”. After the loading bar ends click on “Set as Default”.