Microsoft 8913 – Applications in Microsoft Dynamics CRM 4.0

Vendor Course Code: MS8913

Course Length: 3 days

Overview:

This three-day course explores the Microsoft Dynamics CRM application from a user's perspective. Application functionality covered in the course includes:

- Sales Management
- Marketing Automation
- Service Management
- Service Scheduling

Elements of this syllabus are subject to change.

This three-day instructor-led course provides students with the knowledge and skills to improve their business processes by using the key features of sales management, marketing automation, service management, and service scheduling.

Skills Gained:

After completing this course, students will be able to:

- Microsoft CRM User Interface and application terminology
- Basic and advanced navigation and record maintenance
- Microsoft CRM Client for Outlook functionality and synchronisation
- Planning and budgeting tasks related to marketing campaigns
- Create and manage customer lists
- Create marketing campaigns
- Manage campaigns and track campaign responses
- Account, Contact, and Activity record management
- Service Scheduling functionality. This includes Scheduling Services, Scheduling Administration, and Defining Services.
- Microsoft CRM Advanced Find functionality to evaluate customer data
- Service functionality. This includes Contract, Case, Knowledge Base, and Queue management
- Account, Contact, Lead, Opportunity and Activity record management
- Sales functionality, including Lead, Opportunity, Quote, Order, Invoice, and Product Catalog management

Key Topics:

Course Outline

Module 1: Introduction to Microsoft Dynamics CRM

This module explains how creating and implementing a CRM strategy provides overall value to an organisation. It explains how Microsoft Dynamics CRM supports a successful strategy through a set of modules organised by functional area: sales, marketing, and service. This module also explains how Microsoft Dynamics CRM is installed and used in your environment.

Lessons
Gaining a competitive advantage through CRM
Microsoft Dynamics CRM Modules
Microsoft Dynamics CRM Server and Client Options
Balancing Usability and Reporting
Microsoft Dynamics CRM User Interface
Getting Help
Multi-Language Support in Microsoft Dynamics CRM
Multi-Currency Support in Microsoft Dynamics CRM
Personalising the CRM Experience
Setting Personal Options

After completing this module, students will be able to:

- Explain the benefits of using Microsoft Dynamics CRM to support a CRM strategy.
- Identify the major modules within Microsoft Dynamics CRM.
- Identify the different types of server options and end-user clients available for deploying and accessing Microsoft Dynamics CRM.
- Describe the user interface.
- Identify how Microsoft Dynamics CRM supports companies that operate in global environments with multi-language and multi-currency support.
- Identify how to personalise Microsoft Dynamics CRM to meet specific interface needs.

Module 2: Microsoft Dynamics CRM Basics

This module explains the variety of tools to track, manage, execute, and report on customer interactions, and how a variety of tools to track, manage, execute, and report on customer interactions.

Lessons
View the customer through Microsoft Dynamics CRM
Microsoft Dynamics CRM in Your Organisation
Implementing Processes to support Microsoft Dynamics CRM
Customer Records
Relationships between Customer Records
Record Ownership and Assignment
Using Activities to track Customer Interactions
Using Workflows
Finding and Maintaining Your Data
Using Duplicate Detection
Subject Tree

Lab : Creating Account and Contact Records
Create new accounts, new contracts, and contacts associated with existing accounts.
Lab : Maintaining Accounts and Addresses
Set up a complex organisation model

After completing this module, students will be able to:

- Describe how Microsoft Dynamics CRM provides a customer-centred view of an organisation's activities.
- Identify the organisation's goals and expectations for deploying Microsoft Dynamics CRM.
- Support a successful deployment by defining the organisation's processes.
- Review Microsoft Dynamics CRM core concepts, including customer records.
- Identify the types of relationships that can be established between different kinds of records.
- Explain record ownership concepts, including assigning and sharing records.
- Create activities to track customer interactions.
- Use workflows to complete routine tasks and enforce sales processes.
- Identify the tools you can use to search for records quickly.
- Use Duplicate Detection to ensure data integrity.
- Create a subject tree to help organise your data effectively.

Module 3: Microsoft Dynamics CRM for Microsoft Office Outlook

This module explains the unique benefits of Microsoft Dynamics CRM for Outlook, and explains how you can use Microsoft Dynamics CRM for Outlook to manage e-mail, appointments, tasks, and contacts. Then, this module covers how to create personalised communications using Mail Merge. Finally, the module describes the differences between Microsoft Dynamics CRM for Outlook with off-line functionality verses on-line functionality and how records between Outlook and Microsoft Dynamics CRM are synchronised.

Lessons
Benefits of Using Microsoft Dynamics CRM for Microsoft Office Outlook
Integration between Microsoft Dynamics CRM and Outlook
Record Management in Microsoft Dynamics CRM for Outlook
E-mail management in Microsoft Dynamics CRM for Outlook
Creating Mail Merge Documents
Differences between Outlook Clients
Using Microsoft Dynamics CRM for Outlook with Offline Access

Lab : Creating an Opportunity from an Outlook Appointment
In this lab, you will use the information provided in an inbound e-mail and Set Regarding to create an opportunity and then create an appointment with that opportunity.

Lab : Using Microsoft Dynamics CRM for Outlook with Offline Access
Perform offline and online synchronisation.

After completing this module, students will be able to:

- Examine the benefits of the Microsoft Dynamics CRM for Microsoft Office Outlook clients.
- Review the features of Microsoft Dynamics CRM that appear in Microsoft Office Outlook after installing the Microsoft Dynamics CRM for Microsoft Office Outlook client.
- Explain how records are handled between Microsoft Dynamics CRM for Outlook and Microsoft Dynamics CRM.
- Create and manage Microsoft Dynamics CRM records and activities in Outlook.
- Use Mail Merge to create personalised form documents.
- Review the functionality available when working offline and online.
- Describe how contacts, e-mail, appointments, and tasks synchronise between Outlook and Microsoft Dynamics CRM.

Module 4: Introduction to Sales Management

This module explains the basic sales process and how sales processes may vary between organisations. It describes and provides guidance for making decisions about which areas of Sales to use and how to use them. Also described is how you can use Microsoft Dynamics CRM to work with qualified customers to make a sale. This module goes runs a complex sale process and discusses leads in detail, and how they can be a key entry point in the sales process. The discussion begins with entering and importing leads, and then walks through the process of converting a lead to an opportunity, account and contact. It also covers converting an activity to a lead and ways to disqualify and reactivate leads.

Lessons
Sales Management Overview
Tracking Competitors
Managing Sales Literature
Introduction to Leads
Creating and Importing Leads
Tracking and Converting Leads
Disqualifying and Reactivating Leads
Reporting on Leads
Introduction to Opportunities
Creating Opportunities
Working with Opportunities
Tracking Opportunities through a Sales Process
Closing Opportunities
Using the Sales Pipeline Report

Lab : Create Competitors
Using the competitor form.

Lab : Creating Leads
Create a staged Sales Process workflow for opportunities

Lab : Qualify and Convert Leads
Create activities and tasks, and then qualify and convert a lead.

Lab : Creating a Sales Process
Create a staged sales process workflow.

Lab : Completing a Sales Process
Complete activities for an opportunity forward to the closing stage.

After completing this module, students will be able to:

- Explain the fundamental elements of the sales process.
- Discuss when and how to use the Competitors feature.
- Identify when and how to use the Sales Literature area.
- Discuss when to use leads to qualify or disqualify opportunities.

- Manually create leads and import leads from a file into Microsoft Dynamics CRM.
- Qualify leads, track leads in activities, and convert leads to accounts, contacts, and opportunities.
- Disqualify leads that will not result in sales and reactivate leads that have been disqualified.
- View reports about leads.
- Identify when to use opportunities.
- Create opportunities.
- Work with opportunities by applying sales processes, adding activities, viewing sales literature, and adding products and competitors.
- Use sales process workflows for pipeline reporting.
- Close opportunities.
- Examine the importance of the Sales Pipeline report.

Module 5: Sales Order Processing

This module explains the role of the product catalog in Microsoft Dynamics CRM and the tasks required to set up a product catalog. These tasks include setting up and maintaining unit groups, products, and price lists. This module explains how to process a sales order in Microsoft Dynamics CRM 4.0. It covers quotes, orders, and invoices, and describes the features in Microsoft Dynamics CRM that are used to analyse the data captured in the system. Also described is how the Export to Excel feature enables both static copies and dynamic queries of data to be viewed and evaluated in Microsoft Excel.

Lessons
Completing the Sales Transaction
Product Catalog
Unit Groups
Adding Products
Creating Price Lists
Creating Discount Lists
Creating and Revising Quotes
Creating and Tracking Orders
Creating and Closing Invoices
Evaluating Sales Data
Measuring Performance with Sales Productivity Reports
Using Export to Excel
Using the Report Wizard

Lab : Create a Unit Group and Price List
Create a unit group
Create a unit group

Lab : Convert a Quote to an Order
Convert a quote to an order.

Lab : Sales Productivity
Use Advanced Find to locate information for a report.

After completing this module, students will be able to:

- Review what constitutes a complete sales transaction.
- Identify the role and functions of the product catalog
- Define how unit groups unit groups will be used to collect the different measurements that your products are available in.
- Add products, create kits of products, and specify substitute products.
- Create price lists and set up different prices lists for different types of customers.
- Create and maintain discount lists to use as customer incentives.
- Identify the two states of quotes, how to use quotes, and how to create and edit quotes.
- Create a new order, create an order from a quote, and track order fulfilment.
- Create an invoice from an order and close or cancel an invoice.
- Describe the tools used to evaluate sales data.
- Use default sales productivity reports to review potential opportunities, forecast revenue, and analyse sales productivity.
- Export the results of an Advanced Find or view a Microsoft Office Excel spreadsheet using the Export to Excel feature.
- Use the Report Wizard to create reports.

Module 6: Introduction to Marketing Management

This module describes the marketing functionality and key features you can use to increase marketing effectiveness. It explains the core concepts of marketing campaigns in Microsoft Dynamics CRM including: closed loop marketing, quick campaigns, marketing campaigns, and campaign responses and reporting. This module also explains the process for creating quick campaigns, marketing campaigns, marketing lists, and campaign templates in Microsoft Dynamics CRM.

Lessons
Benefits of Closed Loop Marketing
Quick Campaigns
Marketing Campaigns vs. Quick Campaigns
Creating a Marketing Campaign
Creating and Using Marketing Campaign
Creating and Using Campaign Templates
Managing Campaign Responses
Analysing Campaigns

Lab : Quick Campaigns
Create a quick campaign.

Lab : Create a Marketing Campaign
Create a marketing campaign.

After completing this module, students will be able to:

- Examine the benefits of closed loop marketing.
- Identify when to use a quick campaign and when to use a marketing campaign.
- Examine the purpose of quick campaigns and the key steps to create one.
- Review the purpose and elements of marketing campaigns.
- Identify the way campaign results can be captured.
- Discuss the analysis and reporting available for campaigns.
- Create a marketing campaign.
- Create and use marketing lists.
- Create and use campaign templates.
- Demonstrate how to create a marketing campaign.

Module 7: Implementing Marketing Campaigns

This module explains the process for distributing campaign activities to launch your campaign. Discussed is managing a campaign that is underway and tracking campaign responses.

Lessons
Distribute Campaign Activities
Monitoring Marketing Campaigns
Capturing and Viewing Campaign Responses
Working with Campaign Responses
Analysing Marketing Information

Lab : Create a Campaign Response
Locate information regarding a campaign that is specific to a customer.

After completing this module, students will be able to:

- Distribute Campaign Activities.
- Monitor the status of a campaign.
- Capture campaign responses.
- Manage campaign responses.
- Analyse the results of a marketing campaign using reports

Module 8: Introduction to Service Management

This module introduces Microsoft Dynamics CRM service management functionality and explains how it helps organisations track information about cases, customer complaints or requests, and small projects. It covers the core components of service management and explains how the subject tree provides a structured approach for grouping and managing information. It explains the lifecycle and key concepts of contracts in Microsoft Dynamics CRM, and explains how to create contract templates, and how to modify contracts and how to delete, cancel, renew, or put a contract on hold.

Lessons
Getting Started with Service Management
Subject Trees
Service Management Process Flow
Contracts
Creating Contract Templates
Creating a Contract and Contract Lines
Modifying Contracts and Contract Lines
Renewing Contracts
Working with Contracts

Lab : Creating Contracts and Contract Lines
Create a contract, add contract lines, and invoice the contract.

After completing this module, students will be able to:

- Review the service management tools available in Microsoft Dynamics CRM.
- Explain how a subject tree works and how it relates to service management cases.
- Examine the service management process flow.
- Demonstrate how the service management process flow helps organisations manage and resolve cases.
- Identify the central concepts and life cycle of contract management in Microsoft Dynamics CRM.
- Work with contract templates.
- Create contracts and contract line items.
- Modify contracts and contract lines.
- Renew contracts.
- Explain contract ownership and identify how cases work with contracts.

Module 9: Managing Service Cases

This module explains concepts of case management, the steps in the case resolution process, and the ways you can view and manage cases in Microsoft Dynamics CRM. The module also covers creating, deleting, and editing cases, and then discusses other activities related to case management, such as assigning and sharing cases and using the knowledge base to research issues and resolve cases.

Lessons
Understanding Case Management
Viewing Cases
Creating Cases
Assigning and Reassigning Cases
Accepting Cases
Maintaining Cases
Resolving Cases
Sharing Cases
Reactivating Cases
Cancelling and Deleting Cases
Case Management Reports

Lab : Case Creation and Resolution
Create a case and then resolve a case.

After completing this module, students will be able to:

- Examine the concepts governing cases and the resolution process for a case.
- Access and view cases in Microsoft Dynamics CRM.
- Discover how to create a new case or convert an activity to a case.
- Assign and reassign cases to customer service representatives.
- Accept cases from a Queue.
- View, edit, and work on cases.
- Explain when and how to resolve cases and how to resolve cases using the knowledge base.
- Describe why and how to share cases with others.
- Reactivate cases that have been resolved.

- Review when and how to cancel and delete cases.
- Identify the types of reports related to case management.

Module 10: Microsoft Dynamics CRM Knowledge Base

This module explains how to use the Microsoft Dynamics CRM Knowledge Base, and discusses how organisations can browse, locate, and share information using this repository. Also discussed is how Microsoft Dynamics CRM service queues work, including how to create public queues and routing rules for queues, the process of deleting queues, viewing the list of cases and activities in queues, and how to accept and assign items from queues.

Lessons
Knowledge Base Concepts
Working with Article Templates
Creating and Submitting Articles
Approving, Publishing, and Rejecting an Article
Finding Information in the Knowledge Base
Queues
Setting Up Public Queues
Deleting Queues
Working with Queues

Lab : Creating, Submitting, and Publishing Knowledge Base Articles.
Create, submit and publish a Knowledge Base article

Lab : Creating and Assigning Queues
Create a queue and assign some cases to it.

After completing this module, students will be able to:

- Explain the purpose of the Microsoft Dynamics CRM Knowledge Base, Knowledge Base concepts, and the life cycle of Knowledge Base articles.
- Create Knowledge Base article templates.
- Create and submit Knowledge Base articles.
- Approve, reject, and publish Knowledge Base articles.
- Find information in the Knowledge Base.
- Review the basics of queues and the flow of cases and activities through queues.
- Create public queues and routing rules for them.
- Delete queues.
- Work with queues, including assigning items and accepting them.

Module 11: Introduction to Service Scheduling
This module explains the basic service scheduling process and service scheduling activities in detail.

Lessons
Service Scheduling Overview
Service Scheduling Scenarios
Service Scheduling Process
Navigating and Booking Service Activities in the Service Calendar
Scheduling Service Activities
Close, Cancel, or Reschedule a Service Activity
View Service Activities and Appointments

Lab : Following Up on Appointments
Follow up on appointments.

After completing this module, students will be able to:

- Introduce key service scheduling concepts
- Compare service business scenarios
- Review the service scheduling process flow in Microsoft CRM
- Navigate and book service activities in the Service Calendar.
- Examine service activities.
- Close, cancel, or reschedule a service activity.
- View service activities and appointments.

Module 12: Service Scheduling Administration

This module explains the scheduling administration, setup process, and administrative activities in detail since this is a key entry point in the scheduling process.

Lessons
Scheduling Appointments
Scheduling Users and Other Resources
User Work Schedules
Creating a Group of Resources to Schedule Together
Manage How Resources are allocated for Service Activities
Creating and Managing Sites
Managing Business Closures

Lab : Document Time Off for a User
User work schedules.

Lab : Create Business Closures
Create a business closure time.

After completing this module, students will be able to:

- Review the concepts of scheduling users and other resources in Microsoft CRM
- Set up a schedule for a user, facility or equipment.
- Create, and add users, facility, or equipment to a resource group.
- Remove resources from the scheduled services.
- Create, edit, or add members to a site.
- Set or edit business closures.

Target Audience:

This course is intended for individuals or anyone that plans to implement, use, maintain, or support Microsoft CRM in their organisation. The class is targeted toward service schedulers, administrators, office managers, CEO's, and consultants who want to understand the technical aspects of Microsoft CRM and gain foundational knowledge of the application functionality.

Prerequisites:

Before attending this course, students must have:
General knowledge of Microsoft Windows
An understanding of Customer Relationship Management solution processes and practices