

Microsoft CRM EU: 4.0 Introduction

Vendor Course Code: MSCRMINTRO

Course Length: 1 day

Overview: This one-day instructor-led course provides students with basic knowledge of using Microsoft CRM to perform their day-to-day activities.

Skills Gained: After completing this course, students will be able to:

- Navigate Microsoft CRM and understand the standard application terminology
- Microsoft CRM User Interface and application terminology
- Basic and advanced navigation and record maintenance
- Microsoft CRM Client for Outlook functionality and synchronisation

Key Topics: **Module 1: Overview of Microsoft CRM**

- 1.1 Microsoft CRM Modules
- 1.2 Sales Management Module
- 1.3 The Marketing Automation Module
- 1.4 The Service Management Module

Module 2: Accessing MICROSOFT CRM

- 2.1 Web Client
- 2.2 Outlook Client
- 2.3 The Outlook/MS CRM Relationship
- 2.4 Working Offline

Module 3: Navigating MICROSOFT CRM

- 3.1 Menu
- 3.2 The Standard Toolbar
- 3.3 Actions Toolbar
- 3.4 Navigation Pane
- 3.5 List
- 3.6 Locating Records

Module 4: Module Specific Navigation

- 4.1 Navigating Workplace
- 4.2 Navigating Sales
- 4.3 Navigating Marketing
- 4.4 Navigating Service

Module 5: Performing Daily Activities

- 5.1 Understanding Customer Records
- 5.2 Accounts
- 5.3 Contacts
- 5.4 Address and Sub-Records
- 5.5 Activities
- 5.6 Notes and Attachments
- 5.7 Look for Records

Module 6: Tracking Activities with MS CRM 4.0

- 6.1 Managing Outlook and Microsoft CRM
- 6.2 Emails
- 6.3 Tasks
- 6.4 Appointments
- 6.5 Phone Calls

Module 7: Advanced Features

- 7.1 Advanced Find and Views
- 7.2 Mail Merging
- 7.3 Direct Email
- 7.4 Working offline and synchronising

Module 8: Reporting Overview

- 8.1 Accessing Reports
- 8.2 Report Wizard

Target Audience:

New users of CRM 4.0

Prerequisites: