

Microsoft CRM EU: 4.0 Service and Scheduling

Vendor Course Code: MSCRMSERVS

Course Length: 1 day

Overview: This one-day instructor-led course provides students with the knowledge and skills to improve their day to day working environment by using the service management, and service scheduling module within CRM.

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

- Navigate Microsoft CRM and understand the standard application terminology
- Understand Service functionality. This includes Contract, Case, Knowledge Base, and Queue management
- Use the Service Scheduling functionality. This includes Scheduling Resources and managing resources.
- Using the Knowledge base.
- Creating a Contract
- Using and viewing Reports specific to the Service Module in CRM

Key Topics:

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Module 1: Creating Customer Service Contracts

- 1.1 Viewing Contracts
- 1.2 Contract Templates
- 1.3 Create a contract
- 1.4 Contract Lines
- 1.5 Adding Notes and Attachments to a Contract
- 1.6 Contract Status
- 1.7 Renewing Contracts

Module 2: Customer Service Management

- 2.1 Creating Cases
- 2.2 Viewing & Managing Cases
- 2.3 Using Knowledge Base
- 2.4 Resolving Cases
- 2.5 Assigning / Reassigning Cases
- 2.6 Sharing Cases
- 2.7 Reactivating Cases

Module 3: Queues

- 3.1 Viewing Queues
- 3.2 Public Queues
- 3.3 Case Routing

Module 4: Managing Resources

- 4.1 User Work Schedules
- 4.2 Resource Groups
- 4.3 Resource Selection Rules
- 4.4 Site Management

Module 5: Scheduling Services

- 5.1 Service Calendar
- 5.2 Booking Service Activities
- 5.3 Close, Cancel or Reschedule Activities
- 5.4 Customer Preferences

Module 6: Knowledge Base

- 6.1 Article Templates
- 6.2 Creating Articles
- 6.3 Publishing Processes
- 6.4 Approval and Rejection
- 6.5 Updating Articles

Module 7: Advanced Features

- 7.1 Create a Contract Template
- 7.2 Deleting a Contract Template

Module 8: Reporting & Analytics

- 8.1 About the Reports

Target Audience:

Service and scheduling users of CRM 4.0

Prerequisites:

Microsoft CRM EU: 4.0 Introduction