Course Outline

ADVANCEDTRAINING

Microsoft Dynamics CRM 4.0 Applications

Introduction

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. It explores the Microsoft Dynamics CRM application from a user's perspective.

Pre-Requisites

Before attending this course, students must have a general knowledge of Microsoft Windows and an understanding of Customer Relationship Management solution processes and practices.

Outcomes

At the completion of this course, participants will be able to:

- Use Microsoft CRM User Interface and application terminology
- Use basic and advanced navigation and record maintenance
- Use Microsoft CRM Client for Outlook functionality and synchronization
- Plan and budget 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

Nationally Recognised Training
RTO No. 21932

Microsoft GOLD CERTIFIED Partner | Learning Solutions

(1300 86 87246
1300 TO TRAIN

Course Details

Course Code: MS 8913
Duration: 3 days
Starting time: 9am
Finishing time: 4.30pm
Lunch and refreshments are provided.

Booking guidelines

Contact our Learning Consultants on 1300 86 87246 and we will assist you with your booking.

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Introduction to Microsoft Dynamics CRM

- Gaining a competitive advantage through CRM
- Understanding customer relationships in Microsoft Dynamics CRM
- Managing processes with Microsoft Dynamics CRM
- Understand the benefits of using Microsoft Dynamics CRM to support a CRM strategy
- Identify the functionality and purpose of the Microsoft Dynamics CRM sales module
- Identify the foundation of customer relationships in Microsoft Dynamics CRM
- Understand how Microsoft Dynamics CRM balances the needs of usability and reporting to benefit both management and staff

Understanding Microsoft Dynamics CRM Software

- Understanding the Microsoft Dynamics CRM Server and Client Options
- Accessing Microsoft Dynamics CRM
- Understanding the Microsoft Dynamics CRM User Interface
- Getting Help
- Personalizing the CRM Experience
- Identify the different types of server options and end-user clients available for deploying and accessing Microsoft Dynamics CRM
- Access Microsoft Dynamics CRM
- Become familiar with the user interface
- Recognize how to access Help
- Identify how to personalize Microsoft Dynamics CRM to meet your specific interface needs

Using Microsoft Dynamics CRM in a Global Market

- Understanding Multi-Language Support in Microsoft Dynamics CRM
- Understand Multi-Currency Support in Microsoft Dynamics CRM
- Setting Personal Options
- Understand how Microsoft Dynamics CRM supports companies that operate in global environments with multi-language support
- Use Microsoft Dynamics CRM features to support multiple currencies
- Personalize user environments to match the user's preferred language, currency and date format

The Customer Centered View

- View the customer through Microsoft Dynamics CRM
- Microsoft Dynamics CRM in your organization
- Implementing processes to support Microsoft Dynamics CRM
- Understanding customer records
- Relationships between customer records
- Understanding record ownership and assignment
- Using Activities to track customer interactions
- Using workflows
- Finding and maintaining your data
- Using duplicate detection
- Understanding the subject tree
- Create new accounts, new contacts, and contacts associated with existing accounts
- Set up a complex organization model
- Understand how Microsoft Dynamics CRM provides a customer-centered view of an organization's activities
- Identify your organization's goals and expectations for deploying Microsoft Dynamics CRM
- Support a successful deployment by defining your organization's processes
- Understand Microsoft Dynamics CRM core concepts, including customer records
- Identify the types of relationships that can be established between different kinds of records
- Understand record ownership concepts, including assigning and sharing records
- Create activities to track customer interactions
- Use workflows to carry out 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 organize your data effectively

Using Microsoft Dynamics CRM for Outlook

- Understanding Microsoft Dynamics CRM for Outlook
- Understanding integration between Microsoft Dynamics CRM and Outlook
- Understanding records in Microsoft Dynamics CRM for Outlook
- E-mail management in Microsoft Dynamics CRM for Outlook
- Creating mail merge documents
- Understanding differences between Outlook clients
- Synchronizing Microsoft Dynamics CRM data
- Perform offline and online synchronization
- Understand the benefits of Microsoft Dynamics CRM for Microsoft Office Outlook
- Understand how records are handled between Microsoft

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- Dynamics CRM for Outlook and Microsoft Dynamics CRM
- Create and manage Microsoft Dynamics CRM records and activities in Outlook
- Understand how to use Mail Merge to create personalized form documents
- Understand the functionality available when working Offline and Online
- Understand how contacts, e-mail, appointments and tasks synchronize between Outlook and Microsoft Dynamics CRM

ø Introduction to Sales

- Introducing Sales Management
- Managing Leads
- Managing Opportunities
- Processing Sales Orders
- Managing Products and Pricing
- Keeping Track of Competitors
- Managing Sales Literature
- Using the competitor form
- Know the fundamental elements of the sales process
- Know when to use leads to qualify or disqualify opportunities
- Know when to use opportunities
- Understand sales order processing and know when to use quotes, orders, and invoices
- Create, post, and review purchase invoices
- Know when to use the Product Catalog
- Know when and how to use the Competitors area
- Know when and how to use the Sales Literature area

ø Opportunity Management

- Understanding Opportunities
- Sales processes and sales pipeline report
- Creating opportunities
- Working with opportunities
- Closing opportunities
- Create a staged Sales Process workflow for opportunities
- Work with the activities of an opportunity in the Proposal sales stage to move the opportunity forward to the Closing stage
- Understand the role of opportunities in Microsoft Dynamics CRM
- Use sales process workflows for pipeline reporting
- Create opportunities
- Work with opportunities, by applying such things as sales processes, adding Activities, viewing sales literature, adding products and competitors
- Close opportunities

ø Managing Leads

- Using Leads in Microsoft Dynamics CRM
- Creating and Importing Leads
- Tracking and Converting Leads
- Disqualifying and Reactivating Leads
- Reporting on Leads
- Managing and Creating Leads
- Create a Lead
- Convert a lead to an Opportunity, account and contact
- Understand the process for using leads in Microsoft Dynamics CRM
- Create and import leads into Microsoft Dynamics CRM from a file
- The goal of this demonstration is to convert an e-mail activity to a lead
- Qualify leads and track and convert them
- Convert a lead to an opportunity
- Review the new contact and account
- Disqualify leads that will not result in sales and reactivate leads that have been disqualified
- View reports about leads

ø Using the Product Catalog

- Understanding the Product Catalog
- Creating Price Lists
- Creating and Editing Discount Lists
- Create a unit group
- Create a price list
- Identify the role and functions of the product catalog
- Define unit groups to reflect packaging
- 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

ø Sales Order Processing

- Understanding sales order processing
- Creating and revising quotes
- Creating and tracking orders
- Creating and closing invoices
- Create an order from a quote
- Understand what constitutes a complete sales transaction
- Understand 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 fulfillment
- Create an invoice from an order and close or cancel an invoice

ø Sales Reporting

- Evaluating Sales Data
- Measuring performance with sales productivity reports
- Using export to Excel
- Using the Report Wizard
- Using Advanced Find to locate and view information for a report
- Using the Lead Source Effectiveness Report
- Understand the tools you use to evaluate sales data
- Use default sales productivity reports to review potential opportunities, forecast revenue and analyze sales productivity

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- Export the results of an Advanced Find or view an Excel spreadsheet using the Export to Microsoft Excel feature

Understanding Marketing Campaigns

- Benefits of Closed Loop Marketing
- Marketing campaigns versus quick campaigns
- Using quick campaigns
- Understanding marketing campaigns
- Managing campaign responses
- Analyzing campaigns
- Understand the benefits of closed loop marketing
- Identify when to use a quick campaign and when to use a marketing campaign
- Know the purpose of quick campaigns and the key steps to create one
- Know the purpose and elements of marketing campaigns
- Identify the way campaign results can be captured
- Understand the analysis and reporting available for campaigns

Planning and Creating Marketing Campaigns

- Creating quick campaigns
- Creating a marketing campaign
- Creating and using marketing lists
- Creating and using campaign templates
- Create a quick campaign
- Create a marketing campaign
- Campaign tasks and activities
- Create a new quick campaign
- Create a marketing campaign
- Create and use marketing lists
- Create and use campaign templates

Managing Marketing Campaigns

- Distributing campaign activities
- Monitoring marketing campaigns
- Capturing and viewing campaign responses
- Working with campaign responses
- Analyzing marketing information
- Locate information regarding a campaign that is specific to a customer
- Distributing Campaign Activities. Manage campaign responses
- Analyze the results of a marketing campaign using reports
- Analyze the results of a marketing campaign using reports

Understanding Service Management

- Getting Started with Service Management
- Understanding Subject Trees
- Understanding the Service Management Process Flow
- Understand the service management tools available in Microsoft Dynamics CRM
- Understand how a subject tree works and how it relates to service management cases
- Understand the service management process flow
- Gain an understanding of how the service management process flow helps organizations manage and resolve cases by viewing a demonstration

Managing Contracts

- Understanding Contracts
- Creating and managing contract templates
- Creating a contract and contract lines
- Modifying contracts and contract lines
- Renewing contracts
- Working with contracts
- Create a contract, add contract lines, and invoice the contract
- Put a contract on hold, reinstate it, and then renew it
- Learn the key concepts and lifecycle of contract management in Microsoft Dynamics CRM
- Work with contract templates
- Create contracts and contract line items
- Modify contracts and contract lines
- Renewing contracts
- Working with contracts
- Create a contract, add contract lines, and invoice the contract
- Put a contract on hold, reinstate it, and then renew it
- Learn the key concepts and lifecycle of contract management in Microsoft Dynamics CRM
- Work with contract templates
- Create contracts and contract line items
- Modify contracts and contract lines
- Renew contracts
- Understand contract ownership and identify how cases work with contracts
- Managing Cases
- Understanding case management
- Viewing Cases
- Creating Cases
- Assigning and reassigning cases
- Editing cases
- Resolving cases
- Sharing cases
- Reactivating cases
- Canceling and deleting cases
- Case management reports
- Manage cases
- Understand the concepts governing cases and the resolution process for a case
- Become familiar with where to access and view cases in Microsoft Dynamics CRM
- Learn how to create a new cases or convert an activity to a case

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- Understand how to assign and reassign cases to customer service representatives
- Understand how to accept cases from a Queue
- Understand how to view, edit and work on cases
- Learn when and how to resolve cases and how to resolve cases using the knowledge base
- Learn why and how to share cases with others
- Learn why and how to share cases with others
- Understand when and how to cancel and delete cases
- Know the types of reports related to case managements

Creating A Knowledge Base

- What is the Microsoft Dynamics CRM Knowledge Base
- Working with article templates
- Creating and submitting articles
- Approving, publishing, and rejecting an article
- Finding information in the knowledge base
- Create, submit and publish a Knowledge Base article
- Review, approve, and Reject Knowledge Base article
- Understand 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

Managing Service Queues

- Overview of Queues
- Setting up public queues
- Deleting queues
- Working with queues
- Create a queue and assign some cases to it
- Understand the basics of queues and the flow of cases and activities through queues
- Create public queues and routing rules for them
- Know how to delete queues
- Work with queues, including assigning items and accepting them

Service Scheduling

- Service Scheduling Introduction and Terminology
- Service Scheduling Scenarios
- Service Scheduling Process Flow
- Match terms and descriptions
- Introduce key service scheduling concepts
- Compare service business scenarios
- Understand the service scheduling process flow in Microsoft CRM
- View a demonstration of the service scheduling process

Scheduling Services for Your Customers

- Scheduling Services
- Navigating and Booking Service Activities in the Service Calendar
- Scheduling Service Activities
- Close, Cancel, or Reschedule a Service Activity
- View Service Activities and Appointments
- Setting Service Activity Preferences for Customers
- Schedule a service activity
- Follow up on appointments
- Navigate and book service activities in the Service Calendar
- Schedule a service activity for your customers
- This demonstration illustrates how to create and schedule a service activity using the Service Calendar in Microsoft CRM
- Close, cancel, or reschedule a service activity
- This demonstration illustrates how to reschedule a service activity
- View service activities and appointments
- Set customer preferences for a service activity

Maintaining Users and Resources

- Scheduling users and other resources for services
- User work schedules
- Creating a group of resources that can be scheduled together
- View schedules for resources
- Manage how resources are allocated for service activities
- Create, edit, or add members to a site
- Set or edit business closures
- User work schedules
- Create a business closure time
- Remove a resource
- Understand 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
- View schedules for resources
- Remove resources from the scheduled services
- Create, edit, or add members to a site
- Set or edit business closures