Course Syllabus

Microsoft CRM Service Management

Key Data

Course Number: **8523A**

Number of Days: **1**

Available: **December 2005**

Languages:

- US English

Format:

- Instructor-Led Training (lecture and labs)

Student Materials:

- Student Courseware

Certification Exam:

This course helps prepare for the Microsoft CRM Applications certification exam

This course syllabus should be used to determine whether the course is appropriate for the students, based on their current skills and technical training needs.

Course content, prices, and availability are subject to change without notice.

Key Related Courses:

Microsoft CRM Sales Management, 8521

Microsoft CRM Marketing Automation, 8522

Microsoft CRM Service Scheduling, 8524

Microsoft CRM Customization, 8525

Microsoft CRM Installation and Configuration, 8526

Introduction

This one-day course explores the Microsoft® CRM application from a user's perspective. Application functionality covered in the course includes Core CRM Navigation, User Interface, Outlook Client, and the Service module. This application course does not include materials or instructor discussion of Microsoft CRM Installation, Application Configuration, Workflow Configuration, Customization, Back Office Integration or Data Migration.

This course teaches the processes and functionality used by Service managers and Service representatives. The course starts with an introduction to the core concepts of Microsoft CRM and then an overview of the Service processes. Subsequent chapters explore the Service concepts in more detail. A complete understanding of the service processes in Microsoft CRM helps you receive the most out of the system.

Audience

Microsoft CRM Service training is recommended for anyone who plans to implement, use, maintain, or support Microsoft CRM in their organization. The class is targeted toward service representatives, 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.

At Course Completion

After completing this chapter, students should understand:

- The Microsoft CRM User Interface and application terminology
- How to use options to personalize the Microsoft CRM User Interface and personal settings
- Basic and advanced navigation and record maintenance
- Microsoft CRM Client for Outlook functionality and synchronization
- Account, Contact, and Activity record management
- Service functionality. This includes Contract, Case, Knowledge Base, and Queue management
- Microsoft CRM Advanced Find functionality to evaluate customer data

Prerequisites

Before attending this course, students must have:

- General knowledge of Microsoft® Windows®
- An understanding of Customer Relationship Management solution processes and practices

Student Materials

The student materials include comprehensive courseware and other appropriate materials for this class.

For a referral to a Microsoft Certified Partner Learning Solution in your area, see the Microsoft Training and Certification Web site at http://www.microsoft.com/traincert.
Call your local Microsoft Certified Partner Learning Solution for more information and to register for classes.

Chapter 1: Microsoft CRM Concepts

This chapter describes the overall solution of Microsoft CRM and the benefits to an organization.

Main Topics
▪ Microsoft CRM Modules ▪ Accessing Microsoft CRM ▪ Customer Records ▪ Customer Relationships ▪ Understanding customization availability
Labs
▪ Working with Records ▪ Accounts and Contacts

After completing this chapter, students should be able to:

- Recognize the overall solution that Microsoft® CRM provides
- Identify the functionality and purpose of the Microsoft CRM modules
- Log on to Microsoft CRM
- Recognize the relationship between account and contact records in Microsoft CRM
- Identify the types of relationships that can be created between records

Chapter 2: Microsoft CRM Client for Outlook

This chapter examines how the Microsoft CRM Client for Outlook works, how the functionality is similar to the web client, and how to work in the Outlook Client interface.

Main Topics
▪ Identifying the functionality available in the Microsoft CRM Client for Outlook ▪ Navigate within the Microsoft CRM client for Outlook user interface ▪ Navigate within the Microsoft CRM client for Outlook user interface ▪ Create and manage Microsoft CRM records and activities in Outlook
Labs
▪ Synchronization in the Outlook client

After completing this chapter, students should be able to:

- Identify the functionality available in the Microsoft CRM Outlook client.
- Navigate the user interface of the Microsoft CRM Outlook client.
- Identify how the Outlook client synchronizes with Microsoft Outlook and the Microsoft CRM Server and also to how to take the Outlook client offline and online.
- Identify the difference between Microsoft CRM and Outlook records and how the different record types are managed in the Outlook client.
- Create mail merge documents for the available record types in the Microsoft CRM Outlook client.

Chapter 3: Service Management Life Cycle

This chapter discusses a basic service management process starting with resolving a case for an existing customer.

Main Topics
• Understand the service management process flow in Microsoft CRM • View a demonstration of the service management process

After completing this chapter, students should be able to:

- Identify the service management process flow in Microsoft CRM
- Complete an overview of the service management process including the following tasks:
- Create a case
- Browse and use the knowledge base
- Use contract agreements to ensure that customers receive appropriate levels of service
- Run reports to check for service level activity

Chapter 4: Contract Management

This chapter looks at the Microsoft CRM Contract Management, and discusses how organizations can use service level agreements to determine customer entitlement.

Main Topics
▪ Understand the Contract life cycle ▪ Understand the role of Contracts and Contract Lines ▪ Create, manage, and define Contracts and Contract Templates
Labs
▪ Contracts, Contract Lines, and Cases ▪ Creating and Sharing Contracts ▪ Modifying Contracts and Contract Lines ▪ Renewing Contracts ▪ Changing the Status of a Contract

After completing this chapter, students should be able to:

- Identify the role of Contracts and Contract Lines
- Create and manage contract Templates
- Create and manage Contracts
- Modify Contracts
- Assign and share Contracts
- Compare Contracts relationships to other Microsoft CRM records
- Recognize the Contract life cycle

Chapter 5: Case Management

This chapter looks at the Case Management, and discusses how organizations can use cases to track, and resolve customer related issues.

Main Topics
▪ Understand the lifecycle of a case ▪ Understand the effects of Case routing ▪ Create, modify, assign, share, and resolve cases
Labs
▪ Case Management ▪ Case Resolution Process ▪ Case Creation and Resolution

After completing this chapter, students should be able to:

- Recognize the role of Cases
- Identify the life cycle of a case
- Create Cases
- Recognize the effects of Case routing
- Access and Navigate Cases
- Assign and Share Cases
- Relate Cases to Contracts
- Resolve, Cancel, Reactivate, and Delete Cases
- Print Reports related to Case Management

Chapter 6: Creating a Knowledge Base

This chapter looks at the Microsoft CRM Knowledge Base, and discusses how organizations can browse, locate and share information in this repository.

Main Topics
▪ Recognize the purpose of the Microsoft CRM Knowledge Base. ▪ Understand the life cycle of Knowledge Base articles. ▪ Create Knowledge Base articles and article templates. ▪ Create, submit reject, and publish Knowledge Base articles.
Labs
▪ Creating, Submitting, and Publishing Knowledge Base Articles ▪ Reviewing, approving and rejecting Knowledge Base Articles

After completing this chapter, students should be able to:

- Identify Knowledge Base terminology
- Recognize the life cycle of the Knowledge Base
- Create, edit, or deactivate an article template
- Find information in the knowledge base
- Create or delete an article
- Change the contents of an article

- Deactivate or delete article templates
- Add or delete article comments
- Submit an article for approval
- Approve and publish, or reject an article
- Send articles in e-mail
- Print articles

Chapter 7: Managing Service Queues

This chapter takes a look at the process of managing service queues in Microsoft CRM, and discusses how to create, manage, and use queues based on how an organization is structured.

Main Topics
▪ Understand the flow of cases and activities through queues ▪ View and explore queues ▪ Assign and Accept queue items ▪ Create, Edit and Delete public queues ▪ Understand case routing and queues
Labs
▪ Flow of Cases and Activities through Queues ▪ Assigning and Accepting Queue Items ▪ Case Routing and Using Queues ▪ Queue Monitoring and Case Resolution

After completing this chapter, students should be able to:

- Identify the flow of cases and activities through queues
- View and explore queues
- Assign and Accept queue items
- Create, Edit, and Delete public queues
- Recognize case routing and queues