

Course 80292A: Service Management in Microsoft Dynamics CRM 2011

Length: 1 Days
Published: May 12, 2011
Language(s): English
Audience(s): Information Workers
Level: 200
Technology: Microsoft Dynamics CRM 2011
Type: Course
Delivery Method: Instructor-led (classroom)

OVERVIEW

About this Course

This course introduces Microsoft Dynamics CRM service management functionality and explains how it helps organizations track information about cases, customer complaints or requests, and small projects. You will learn how to use the knowledge base and discusses how organizations can browse, locate, and share information in the repository. It also discusses how to create, manage and use teams and queues in Microsoft Dynamics CRM.

Audience Profile

This course is designed for new partners and customers of Microsoft Dynamics CRM that want to learn about the available service management features in the Microsoft Dynamics CRM product.

At Course Completion

After completing this course, students will be able to:

- Use some of the most common service management applications of Queues and Contracts.
- Work with cases in the case grid.
- Understand the steps required to create a new case.
- Create and manage contract templates.
- Create and manage contracts.
- Add contract lines to a contract.
- Associate contracts with cases.
- Create, activate and deactivate, and delete Knowledge Base article templates.
- Search articles from within a case record and utilize articles to resolve cases.
- Create, manage and work with Teams.
- Define steps involved in creating and managing queues.
- Work with queue items.
- Build personal & system charts & dashboards to provide insight into important service management information.

COURSE OUTLINE

Module 1: Introduction

This module introduces Microsoft Dynamics CRM service management functionality and explains how it helps organizations track information about cases, customer complaints or requests, and small projects.

Lessons

- Getting Started with Service Management
- Cases and the Service Management Process
- Queues and Contracts in Service Management
- Working with Cases in the Case Grid

Lab : Assigning Cases and Default Queues

After completing this module, students will be able to:

- Understand the fundamental record types used in Microsoft Dynamics CRM for Service Management.
- Identify how the service management process flows helps organizations manage and resolve cases and provide efficient customer service.
- Understand Queues and Contracts.
- Work with cases in the case grid.

Module 2: Working with Cases and Contracts

This module explains cases and contracts and about how they can be used together in service management functions.

Lessons

- Creating Case Records
- Working with Cases
- Contracts and Contract Templates
- Creating and Working with Contracts
- Using Contracts with Cases

Module 2 (cont'd):

Lab : Resolving a Case with a Contract

After completing this module, students will be able to:

- Identify the steps required to create a new case.
- Understand the impact of activities and procedures for using the knowledge base.
- Understand the components of contracts.
- Create and manage contract templates.
- Create and manage contracts.
- Understand the role of contract lines and add contract lines to a contract.
- Associate contracts with cases.
- Understand the case resolution process when contracts are used.

Module 3: Using the Knowledge Base

This module explains how to use the knowledge base and discusses how organizations can browse, locate, and share information in the repository.

Lessons

- Article Templates
- Creating, Approving and Publishing Articles
- Using and Searching the Knowledge Base
- Cases and Knowledge Base Articles

Lab : Managing Knowledge Base Articles

After completing this module, students will be able to:

- Create, activate, deactivate and delete Knowledge Base article templates.
- Examine the complete process of creating, editing and publishing Knowledge Base articles.
- Search for Knowledge Base articles through the Workplace, Service and Advanced Find.
- Search articles from within a case record.
- Utilize articles to assist in resolving cases.

Module 4: Working with Teams and Queues

This course discusses how to create, manage and use teams and queues in Microsoft Dynamics CRM.

Lessons

- Introduction to Teams
- Introduction to Queues
- Creating and Managing Queues
- Working with Queues and Queue Items
- Using Workflows with Queues

Lab : Routing Cases to Queues

After completing this module, students will be able to:

- Create, manage, and work with Teams.
- Identify uses of queues for sales and customer service.
- Define steps involved in creating and managing queues.
- Work with queue items.
- Identify how queues and workflows can be used together to increase efficiency.

Module 5: Analysis, Reporting and Goals

This module discusses the many methods available for analyzing and reporting on service management information in Microsoft Dynamics CRM.

Lessons

- Service Management Reports
- Service Management Charts and Dashboards
- Goal Management for Service

Lab : Goal and Goal Metrics

After completing this module, students will be able to:

- Work with pre-configured service management reports.
- Build personal and system charts and dashboards to provide insight into important service management information.
- Use the Goal Management features to create and manage goals for service management.

PREREQUISITES

Before attending this course, students must have:

- General working knowledge of customer relationship management
- General understanding of business processes
- General working knowledge of Microsoft Windows.