

80545: Customer Service in Microsoft Dynamics CRM 2013

Course Outline

Module 1: Introduction

Microsoft Dynamics CRM includes a comprehensive set of features that increases the efficiency of customer service operations. This module introduces Microsoft Dynamics CRM Customer Service terminology and customer scenarios that the Customer Service module might be used. The module discusses the basic components of case management, and works with the knowledge base, queues, and service contracts. The module also provides an overview of service scheduling and service management.

Lessons

- Customer Scenarios
- Customer Service Entities and Record Types

Module 2: Cases

Customer service is important to a customer relationship management strategy. Microsoft Dynamics CRM provides many features that organizations can use to manage the services they provide to customers. This module discusses cases and how the cases can be used together in service management functions.

Lessons

- Creating Case Records
- Understanding the Process Ribbon and Menu Options
- Case Resolution, Canceling and Deleting
- Assigning Case Records
- Other Actions on Cases From Forms and Views
- Working with the Subject Tree
- Working with the Case List and Views

Lab : Case Resolution Processing

- Create a case
- Associate a phone call with the case
- Resolve the case

Module 3: Knowledge Base

Most customer service organizations use a knowledge base to provide customer service representatives (CSRs) with the information that they must have to answer questions about a product or service. In Microsoft Dynamics CRM, the Knowledge Base provides a central repository for an organization's information, stored as Articles and organized by Subject.

Lessons

- Article Templates
- Creating, Approving and Publishing Articles

- Using and Searching the Knowledge Base
- Cases and Knowledge Base Articles
- Sending Knowledge Base Articles

Lab : Managing Knowledge Base Articles

- Create, Submit, and Publish a Knowledge Base Article.

Module 4: Queue Management

A queue is an area that is used to organize and store activities and work items that are waiting to be processed. A queue is also used for activities and work items that are currently being worked on.

Microsoft Dynamics CRM includes queuing and workflow tools to improve how incoming requests for sales, marketing, and customer service are handled.

Lessons

- Queue Management

Lab : Create and Manage Queues

- Create a New Public Queue for Incoming Questions

Module 5: Contracts

Microsoft Dynamics CRM provides many features that organizations can use to manage the services they provide to customers. This module describes how contracts can be used together with other record types in Microsoft Dynamics CRM to help service and manage functions.

Lessons

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

Lab : Resolving a Case with a Contract

- Create a Contract Template
- Create a Contract using a Contract Template
- Open a case and associate a contract
- Create and Close an Appointment Activity a With the Case
- Resolve the Case

Module 6: Analysis, Reports and Goals

In Microsoft Dynamics CRM, many methods are available to analyze and report Service Management information. By default, several reports are available, and this includes the “Case Summary Table” report. This report is discussed in this module.

Lessons

- Customer Service Reports
- Customer Service Charts and Dashboards
- Customer Service Goals and Metrics

Lab : Goals and Goal Metrics

- Modify a Goal Metric to Include in-Progress Cases

Module 7: Service Scheduling

This module provides an overview of the service scheduling features of Microsoft Dynamics CRM. The organizations that use service scheduling require a complex combination of resources. Service scheduling considers the availability of employees, facilities, and equipment to make sure that the resources are available to deliver service activities for customers.

Lessons

- Service Scheduling Scenarios
- Service Scheduling Terminology
- Service Scheduling Process
- Resources, Services and Selection Rules
- Include Customer Preferences
- Understand Sites and Same-Site Requirements
- Manage Business Closures
- Explain the Service Activity Scheduling Engine
- Working with Service Activities and the Service Calendar
- Close, Cancel, or Reschedule a Service Activity

Lab : Schedule a Service by Using a Same-Site Requirement

- Create a Service Activity based on a Same-Site Requirement Service.