

(80545A) –Customer Service in Microsoft Dynamics CRM 2013

OBJECTIVE

This course focuses on how an organization can nurture customer satisfaction through automation of business processes within Microsoft Dynamics CRM 2013. This course provides an insight into all of the powerful Customer Service and Service Scheduling functionality capabilities within Microsoft Dynamics CRM 2013.

Additionally, this course guides you through the process of working with your customers in Microsoft Dynamics CRM 2013, including: resolution of customer complaints and services issues cost effectively, and provides insight on managing all related correspondence, documents, contacts and conversations. This course demonstrates the rich and relevant view of your customer that provides your team with actionable insights, including the use of knowledge management in a centralized knowledge base.

COURSE TOPICS

Module 1: Introduction

- Customer Scenarios
- Customer Service Entities and Record Types

Module 2: Cases

- 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

Module 3: Knowledge Base

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

Module 4: Queue Management

- Customization or Development? Microsoft Dynamics CRM Solutions Introduction to Entity Customization

Module 5: Contracts

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

Module 6: Analysis, Reports and Goals

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

Module 7: Service Scheduling

- 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

After completing this course, students will be able to:

- Identify the key set of terms, phrases and elements to effectively work with Customer Service Scenarios and Terminology
- Recognize why cases are the fundamental record type in service management, and represent a single incident of service.
- Use Queues to organize and store Activities and Cases that are waiting to be processed.
- Effectively search the Knowledge Base to access a repository of informational articles used to assist customer service representatives in the resolution of cases.
- Utilize Contract Management to specify the amount of support services a customer is entitled to.
- Use reporting functionality to gain insight into trends, performance, and identifying opportunities and potential issues.
- Practice Goal Management features to establish and track progress against target values for key performance indicators.

- Use the Service scheduling functionality and how it is designed to assist organizations when providing services that require complex combinations of resources.

PREREQUISITES

Before attending this course, students must have:

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

TRAINING APPROACH

This course includes lectures, course notes, exercises and hands-on practice.

COURSE DURATION

24 Hours (in 3 days)

CERTIFICATION COMPLETION

A certificate of completion is provided for all trainees attending the course