Microsoft Dynamics

Course Syllabus

Microsoft Dynamics CRM 4.0 Applications

This three-day course explores the Microsoft® Dynamics CRM application from a user's perspective. Application functionality covered in the course includes:

- Sales Management
- Marketing Automation
- Service Management
- Service Scheduling

Elements of this syllabus are subject to change.

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.

Key Data

Course #:	**8913**
Number of Days:	**3**
Format:	**Instructor-Led**
Certification Exams:	**None**
Certification Track:	**None**

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.

Audience

This course is intended for individuals or anyone that plans to implement, use, maintain, or support Microsoft CRM in their organization. The class is targeted toward service schedulers, 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 course, students will be able to:

- Microsoft CRM User Interface and application terminology
- Basic and advanced navigation and record maintenance
- Microsoft CRM Client for Outlook functionality and synchronization
- Planning and budgeting 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

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 kit includes a comprehensive workbook and other necessary materials for this class.

Module 1: Introduction to Microsoft Dynamics CRM

This module explains how the overall value to an organization of creating and implementing a CRM strategy. It explains how Microsoft Dynamics CRM supports a successful CRM strategy through a set of modules organized by functional area: sales, marketing, and service.

Lessons
▪ Gaining a competitive advantage through CRM. ▪ Understanding customer relationships in Microsoft Dynamics CRM. ▪ Managing processes with Microsoft Dynamics CRM.

After completing this module, students will be able to:

- 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

Module 2: Understanding Microsoft Dynamics CRM Software

This module explains how Microsoft Dynamics CRM is installed and used in your environment. It covers the different types of server and client installations, introduces the user interface describes how to access help and how to personalize the user interface.

Lessons
▪ 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.

After completing this module, students will be able to:

- 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.

Module 3: Using Microsoft Dynamics CRM in a Global Market

This module explains how Microsoft Dynamics CRM works in a global environment, including languages, currencies, and adjusting the interface to different languages and regions.

Lessons
▪ Understanding Multi-Language Support in Microsoft Dynamics CRM ▪ Understand Multi-Currency Support in Microsoft Dynamics CRM ▪ Setting Personal Options.

After completing this module, students will be able to:

- 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.

Module 4: The Customer Centered View

This module explains about the variety of tools to track, manage, execute, and report on customer interactions.

Lessons
▪ 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.
Lab 4.1: Creating Account and Contact Records
▪ Create new accounts, new contacts, and contacts associated with existing accounts.
Lab 4.2:Accounts and Contacts
▪ Set up a complex organization model.

After completing this module, students will be able to:

- 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.

Module 5: Using Microsoft Dynamics CRM for Outlook

This module explains the unique benefits of Microsoft Dynamics CRM for Outlook and explains how you can use Microsoft Dynamics CRM for Outlook to manage e-mail, appointments and tasks and contacts. Then, this module covers how to create personalized communications using Mail Merge. Finally, a lesson explains the differences between Microsoft Dynamics CRM for Outlook with off-line functionality verses on-line functionality and how records between Outlook and Microsoft Dynamics CRM are synchronized.

Lessons
▪ 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.
Lab 5.1: Creating an Opportunity and an Appointment from an inbound e-mail.
▪ In this lab, you will use the information provided in an inbound e-mail and Set Regarding to create an opportunity and then create an appointment with that opportunity.
Lab 5.2: Synchronization in the Microsoft Dynamics CRM Client for Outlook.
▪ Perform offline and online synchronization.

After completing this module, students will be able to:

- Understand the benefits of Microsoft Dynamics CRM for MicrosoftOffice Outlook. .
- Understand how records are handled between Microsoft Dynamics CRM for Outlook and Microsoft Dynamics CRM.
- Understand how records are handled between Microsoft 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.

Module 6: Introduction to Sales

This module explains the basic sales process and how sales processes may vary between organizations. It describes and provides guidance for making decisions about which areas of Sales to use and how to use them.

Lessons
▪ Introducing Sales Management. ▪ Managing Leads. ▪ Managing Opportunities. ▪ Processing Sales Orders. ▪ Managing Products and Pricing. ▪ Keeping Track of Competitors. ▪ Managing Sales Literature.
Lab 6.1: Create Competitor List
▪ Using the competitor form.

After completing this module, students will be able to:

- 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.
- 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.

Module 7: Opportunity Management

This module explains how to use Microsoft Dynamics CRM to work with qualified customers in order to make a sale.

Lessons
▪ Understanding Opportunities. ▪ Sales processes and sales pipeline report. ▪ Creating opportunities. ▪ Working with opportunities. ▪ Closing opportunities.
Lab 7.1: Creating a Sales Process
▪ Create a staged Sales Process workflow for opportunities
Lab 7.2: Managing Your Pipeline
▪ Work with the activities of an opportunity in the Proposal sales stage to move the opportunity forward to the Closing stage.

After completing this module, students will be able to:

- 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.

Module 8: Managing Leads

This module explains how to takes a look at a more complex sale process and discusses leads in detail, as they can be a key entry point in the sales process. The discussion begins with entering and importing leads, and then walks through the process of converting a lead to an opportunity, account and contact. It also covers converting an activity to a lead and ways to disqualify and reactivate leads. Finally, the lesson highlights ways to use lead reports.

Lessons
▪ Using Leads in Microsoft Dynamics CRM. ▪ Creating and Importing Leads. ▪ Tracking and Converting Leads. ▪ Disqualifying and Reactivating Leads. ▪ Reporting on Leads.
Lab 8.1: Managing and Creating Leads
▪ Managing and Creating Leads
Lab 8.2: Create Leads
▪ Create a Lead
Lab 8.3 Qualify and Convert Leads
▪ Convert a lead to an Opportunity, account and contact.

After completing this module, students will be able to:

- 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 then.
- 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.

Module 9: Using the Product Catalog

This module explains how to the role of the product catalog in Microsoft Dynamics CRM and the tasks required to set up a product catalog. These tasks include setting up and maintaining unit groups, products, and price lists.

Lessons
▪ Understanding the Product Catalog. ▪ Creating Price Lists. ▪ Creating and Editing Discount Lists.
Lab 9.1: Create a Unit Group and Price List
▪ Create a unit group ▪ Create a price list

After completing this module, students will be able to:

- 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.

Module 10: Sales Order Processing

This module explains how to process a sales order in Microsoft Dynamics CRM 4.0. This module covers quotes, orders, and invoices.

Lessons
▪ Understanding sales order processing. ▪ Creating and revising quotes. ▪ Creating and tracking orders. ▪ Creating and closing invoices.
Lab 10.1: Convert a Quote to an Order
▪ Create an order from a quote.

After completing this module, students will be able to:

- 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.

Module 11: Sales Reporting

This module explains the additional features in Microsoft Dynamics CRM that are used to analyze the data captured in the system. A number of sales productivity reports provide insight into sales performance and allow for sales forecasting.The Export to Excel feature enables both static copies and dynamic queries of data to be viewed and evaluated in Microsoft Excel.

Lessons
▪ Evaluating Sales Data. ▪ Measuring performance with sales productivity reports. ▪ Using export to Excel. ▪ Using the Report Wizard.
Lab 11.1: Sales Productivity
▪ Using Advanced Find to locate and view information for a report.
Lab 11.2: Sales Productivity Reports
▪ Using the Lead Source Effectiveness Report.

After completing this module, students will be able to:

- Understand the tools you use to evaluate sales data.
- Use default sales productivity reports to review potential opportunities, forecast revenue and analyze sales productivity.
- Export the results of an Advanced Find or view an Excel spreadsheet using the Export to Microsoft Excel feature.

Module 12: Understanding Marketing Campaigns

This module explains the marketing functionality and key features you can use to increase marketing effectiveness. It explains the core concepts of marketing campaigns in Microsoft Dynamics CRM. This lesson will give you an understanding of closed loop marketing, quick campaigns, marketing campaigns, the parts of a marketing campaign, and campaign responses and reporting.

Lessons
▪ Benefits of Closed Loop Marketing. ▪ Marketing campaigns versus quick campaigns. ▪ Using quick campaigns. ▪ Understanding marketing campaigns. ▪ Managing campaign responses. ▪ Analyzing campaigns

After completing this module, students will be able to:

- 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.

Module 13: Planning and Creating Marketing Campaigns

This module explains the process for creating quick campaigns, marketing campaigns, marketing lists, and campaign templates in Microsoft Dynamics CRM.

Lessons
▪ Creating quick campaigns. ▪ Creating a marketing campaign. ▪ Creating and using marketing lists. ▪ Creating and using campaign templates.
Lab 13.1: Quick Campaigns
▪ Create a quick campaign.
Lab 13.2: Create a Marketing Campaign
▪ Create a marketing campaign.
Lab 13.3: Campaign Tasks and Activities
▪ Campaign tasks and activities.

After completing this module, students will be able to:

- Create a new quick campaign.
- Create a marketing campaign.
- Create and use marketing lists.
- Create and use campaign templates.

Module 14: Managing Marketing Campaigns

This module explains the process for distributing campaign activities to launch your campaign. Discussed is managing a campaign that is underway and tracking campaign responses.

Lessons
▪ Distributing campaign activities. ▪ Monitoring marketing campaigns. ▪ Capturing and viewing campaign responses. ▪ Working with campaign responses. ▪ Analyzing marketing information.
Lab 14.1 Create a Campaign Response
▪ Locate information regarding a campaign that is specific to a customer.

After completing this module, students will be able to:

- Distributing Campaign Activities. Manage campaign responses.
- Analyze the results of a marketing campaign using reports
- Analyze the results of a marketing campaign using reports

Module 15: Understanding Service Management

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. It covers the core components of service management and explains how the subject tree provides a structured approach for grouping and managing information.

Lessons
▪ Getting Started with Service Management. ▪ Understanding Subject Trees. ▪ Understanding the Service Management Process Flow

After completing this module, students will be able to:

- 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.

Module 16: Managing Contracts

This module explains the lifecycle and key concepts of contracts in Microsoft Dynamics CRM. It explains how to create contract templates that contracts are based on. This module also explains how to modify contracts and how to delete, cancel, renew, or put a contract on hold.

Lessons
▪ Understanding Contracts. ▪ Creating and managing contract templates. ▪ Creating a contract and contract lines. ▪ Modifying contracts and contract lines. ▪ Renewing contracts. ▪ Working with contracts.
Lab 16.1: Creating Contracts and Contract Lines
▪ Create a contract, add contract lines, and invoice the contract.
Lab 16.2: Using Hold, Release Hold, and Renew Contract
▪ Put a contract on hold, reinstate it, and then renew it.

After completing this module, students will be able to:

- 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.

Module 17: Managing Cases

This module explains concepts of case management, the steps in the case resolution process, and the ways you can view and manage cases in Microsoft Dynamics CRM. The module covers creating, deleting, and editing cases, and then discusses other activities related to case management, such as assigning and sharing cases and using the knowledge base to research issues and resolve cases.

Lessons

- 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.

Lab 17.1: Managing Cases

- Manage cases

Lab 17.2: Case Creation and Resolution

- Create a case and then resolve it.

After completing this module, students will be able to:

- 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.
- 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.
- Know how to reactivate cases that have been resolved.
- Understand when and how to cancel and delete cases.
- Know the types of reports related to case managements.

Module 18: Creating A Knowledge Base

This module explains how to the Microsoft Dynamics CRM Knowledge Base, and discusses how organizations can browse, locate and share information using this repository.

Lessons
▪ 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.
Lab 18.1:Creating, Submitting, and Publishing Knowledge Base Articles.
▪ Create, submit and publish a Knowledge Base article
Lab 18.2: Reviewing, Approving, and Rejecting Knowledge Base Articles
▪ Review, approve, and Reject Knowledge Base article.

After completing this module, students will be able to:

- 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.

Module 19: Managing Service Queues

This module explains how Microsoft Dynamics CRM service queues work, including how to create public queues and routing rules for queues. It discusses the process of deleting queues and explains how to view the list of cases and activities in queues and how to accept and assign items from queues.

Lessons
▪ Overview of Queues. ▪ Setting up public queues. ▪ Deleting queues. ▪ Working with queues.
Lab 19.1: Creating and Assigning Queues
▪ Create a queue and assign some cases to it.

After completing this module, students will be able to:

- 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.

Module 20: Service Scheduling

This module explains the basic service scheduling process.

Lessons
▪ Service Scheduling Introduction and Terminology. ▪ Service Scheduling Scenarios. ▪ Service Scheduling Process Flow.
Lab 20.1: Scheduling Terminology
▪ Match terms and descriptions.

After completing this module, students will be able to:

- 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

Module 21: Scheduling Services for Your Customers.

This module explains the service scheduling activities in detail.

Lessons
▪ 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.
Lab 21.1: Scheduling a Service Activity for a Case
▪ Schedule a service activity.
Lab 21.2: Following up on Appointments
▪ Follow up on appointments.

After completing this module, students will be able to:

- 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.

Module 22: Maintaining Users and Resources

This module explains the scheduling administration, set up process, and administrative activities in detail since this is a key entry point in the scheduling process.

Lessons
▪ 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.
Lab 22.1: User Work Schedules
▪ User work schedules.
Lab 22.2: Create Business Closures
▪ Create a business closure time.
Lab 22.3: Remove a resource from a scheduled Service
▪ Remove a resource.

After completing this module, students will be able to:

- 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.