



Course Syllabus

Microsoft CRM Service Scheduling

Key Data

Course Number: 8524A

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 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 Dynamics GP Foundation, 8506A

Microsoft Dynamics GP General Ledger, 8507A

Microsoft Dynamics GP Receivables Management, 8508A

Microsoft Dynamics GP Bank Reconciliation, 8510A

Microsoft Dynamics GP Fixed Assets, 8511A

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 Scheduling 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 scheduling managers and service schedulers. The course starts with an introduction to the core concepts of Microsoft CRM then an overview of the service scheduling processes. Subsequent lessons explore the service scheduling concepts in more detail. A complete understanding of the scheduling processes in Microsoft CRM helps you receive the most out of the system.

Audience

Microsoft CRM Service Scheduling training is recommended 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 you complete this chapter, you should be able to 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 Scheduling functionality. This includes Scheduling Services, Scheduling Administration, and Defining Services.
- 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. There is a brief overview of each of the available modules. The chapter also discusses the concepts, tasks, navigation, and functions that are used throughout the product.

Main Topics
<ul style="list-style-type: none"> ▪ Microsoft CRM Modules ▪ Accessing Microsoft CRM ▪ Customer Records ▪ Customer Relationships ▪ Understanding customization availability
Labs
<ul style="list-style-type: none"> ▪ Working with Records ▪ Accounts and Contacts

After completing this chapter, students should be able to:

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

Chapter 2: Microsoft CRM Client for Outlook

This chapter discusses how the Microsoft CRM Client for Outlook works, how the functionality is similar to the web client. It provides information on how to work in the Outlook Client interface. The lesson begins by identifying the functionality available in the Outlook Client, and then discusses how to use the functionality.

Main Topics
<ul style="list-style-type: none"> ▪ 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
<ul style="list-style-type: none"> ▪ Synchronization in the Outlook client

After you complete this chapter, students should be able to:

- Identify the functionality available in the Microsoft CRM Outlook client.
- Understand how to navigate the user interface of the Microsoft CRM Outlook client.
- Understand 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.
- Understand how to differentiate between Microsoft CRM and Outlook records and how the different record types are managed in the Outlook client.
- Understand how to create mail merge documents for the available record types in the Microsoft CRM Outlook client.

Chapter 3: Service Scheduling Life Cycle

This chapter discusses a basic service scheduling process starting with defining a service. The Service Manager creates the service, and ensures that the appropriate resources are added to the service. Once this process is complete the Service Representative can schedule a service activity.

Lessons
<ul style="list-style-type: none">▪ Understand the service scheduling process flow in Microsoft CRM.▪ View a demonstration of the service scheduling process

After completing this chapter, students should be able to:

- Understand the service scheduling process flow in Microsoft CRM
- Complete an overview of the service scheduling process including the following tasks: Create a service, Adding a resource to the schedule, Schedule the service, and Run reports to check for service scheduling activity levels

Chapter 4: Scheduling Services for Your Customers

This chapter discusses the scheduling process scheduling service activities in detail since this is a key entry point in the scheduling process. The lesson begins by scheduling services, and then discusses the other activities related to scheduling.

Lessons
<ul style="list-style-type: none">▪ Navigate and book service activities in the Service Calendar▪ Schedule a service activity for your customers▪ Close, Cancel or reschedule a service activity▪ View service activities and appointments▪ Set Customer preferences for a service activity
Labs
<ul style="list-style-type: none">▪ Scheduling a Service Activity for a case▪ Create and Schedule a Service Activity▪ Rescheduling, Closing or Canceling a Service Activity▪ Follow up on appointments, adding notes, and changing service statuses

After you complete this chapter, students should be able to:

- Understand service scheduling
- Book service activities in the service calendar
- Schedule service activities
- View service activities in the appointment book
- Close, cancel or reschedule a service activity
- Search for service activities and resources
- Set scheduling activity preferences
- Find customer information
- Print service information

Chapter 5: Maintaining User and Resources

This chapter discusses the scheduling administration and set up process, and administrative activities in detail since this is a key entry point in the scheduling process. The lesson begins by selecting the working hours for your business, resources and so on, and then discusses the other activities related to ensuring that the scheduling engine has all required information to begin the scheduling process.

Main Topics
<ul style="list-style-type: none">▪ 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▪ Set or edit business closures
Labs
<ul style="list-style-type: none">▪ User Work Schedules▪ Create Business Closures▪ Remove a resource from a scheduled service

After you complete this chapter, students should be able to:

- Set up user, facility and equipment work schedules
- Create resource groups
- Add users, facility, or equipment to a resource group
- View schedules for resources
- Remove resources from the schedule
- Set business closures

Chapter 6: Defining Services

This chapter discusses defining the services that your organization provide, and how resources are added to these services to ensure that Microsoft CRM selects the appropriate resource. The lesson begins by defining rules and resources for services, and then discusses the other activities related to adding the appropriate resources to perform the service activities.

Main Topics
<ul style="list-style-type: none">▪ Define rules and resources for services▪ Create or edit a service
Labs
<ul style="list-style-type: none">▪ Create a Service, and Add Resources

After you complete this chapter, students should be able to:

- Define rules and resources for service activities
- Create or modify a service
- Add resources to a service