

80545: Customer Service in Microsoft Dynamics CRM 2013

Course Outline

1. Module 1: Introduction
 - Customer Scenarios
 - Customer Service Entities and Record Types
2. 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
 - Lab : Case Resolution Processing
 - Create a case
 - Associate a phone call with the case
 - Resolve the case
3. 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
 - Lab : Managing Knowledge Base Articles
 - Create, Submit, and Publish a Knowledge Base Article.
4. Module 4: Queue Management
 - Queue Management
 - Lab : Create and Manage Queues
 - Create a New Public Queue for Incoming Questions
5. Module 5: Contracts
 - 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

6. Module 6: Analysis, Reports and Goals

- 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

7. 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
- Lab : Schedule a Service by Using a Same-Site Requirement