Course Syllabus

Applications in Microsoft Dynamics® CRM 4.0

Key Data

Course #: **8913B**

Number of Days: **3**

Format: **Instructor-Led**

Certification Exams:

This course helps you prepare for the following Microsoft Certified Professional exams:

- MB2-632, Applications in Microsoft Dynamics CRM 4.0

Certification Track:

- Microsoft Certified Business Management Solutions Specialist
- Microsoft Certified Business Management Solutions Professional

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.

This three-day instructor-led course, Applications in Microsoft Dynamics® CRM 4.0, provides students with the necessary tools to use Microsoft Dynamics CRM 4.0. The course focuses on the user interface and application functionality, specifically: Sales, Marketing Automation, Service, and Service Scheduling.

Audience

This course is intended for individuals that plan to implement, use, maintain, or support Microsoft Dynamics CRM in their organization. The course is intended for service schedulers, administrators, office managers, CEOs, and consultants who want to gain foundational knowledge of the application functionality.

At Course Completion

After completing this course, students will be able to:

- Use the Microsoft Dynamics CRM user interface and application terminology
- Develop basic and advanced navigation and record maintenance
- Access the Microsoft Dynamics for Outlook functionality, including synchronization
- Perform planning and budgeting tasks related to marketing campaigns
- Create and manage customer lists
- Create marketing campaigns
- Manage campaigns and track campaign responses
- Create and maintain account, contact, and activity record management
- Schedule, administer, and define services
- Use the advanced find functionality to evaluate customer data
- Access and maintain contracts, cases, the knowledge base, and queues.
- Create and manage accounts, contacts, leads, opportunities, and activities.
- Use the sales functionality, including lead, opportunity, quotes, orders, invoices, and the product catalog.

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 creating and implementing a CRM strategy provides overall value to an organization. It explains how Microsoft Dynamics CRM supports a successful strategy through a set of modules organized by functional area: sales, marketing, and service. This module also explains how Microsoft Dynamics CRM is installed and used in your environment.

Lessons
• Gaining a competitive advantage through CRM • Microsoft Dynamics CRM Modules • Microsoft Dynamics CRM Server and Client Options • Balancing Usability and Reporting • Microsoft Dynamics CRM User Interface • Getting Help • Multi-Language Support in Microsoft Dynamics CRM • Multi-Currency Support in Microsoft Dynamics CRM • Personalizing the CRM Experience • Setting Personal Options

After completing this module, students will be able to:

- Explain the benefits of using Microsoft Dynamics CRM to support a CRM strategy.
- Identify the major modules within Microsoft Dynamics CRM.
- Identify the different types of server options and end-user clients available for deploying and accessing Microsoft Dynamics CRM.
- Describe the user interface.
- Identify how Microsoft Dynamics CRM supports companies that operate in global environments with multi-language and multi-currency support.
- Identify how to personalize Microsoft Dynamics CRM to meet specific interface needs.

Module 2: Microsoft Dynamics CRM Basics

This module explains the variety of tools to track, manage, execute, and report on customer interactions, and how a 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 • Customer Records • Relationships between Customer Records • Record Ownership and Assignment • Using Activities to track Customer Interactions • Using Workflows • Finding and Maintaining Your Data • Using Duplicate Detection • Subject Tree
Lab 2.1: Creating Account and Contact Records
• Create new accounts, new contracts, and contacts associated with existing accounts.
Lab 2.2:Maintaining Accounts and Addresses
• Set up a complex organization model.

After completing this module, students will be able to:

- Describe how Microsoft Dynamics CRM provides a customer-centered view of an organization's activities.
- Identify the organization's goals and expectations for deploying Microsoft Dynamics CRM.
- Support a successful deployment by defining the organization's processes.
- Review Microsoft Dynamics CRM core concepts, including customer records.
- Identify the types of relationships that can be established between different kinds of records.
- Explain record ownership concepts, including assigning and sharing records.
- Create activities to track customer interactions.
- Use workflows to complete 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 3: Microsoft Dynamics CRM for Microsoft Office 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, tasks, and contacts. Then, this module covers how to create personalized communications using Mail Merge. Finally, the module describes 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
• Benefits of Using Microsoft Dynamics CRM for Microsoft Office Outlook • Integration between Microsoft Dynamics CRM and Outlook • Record Management in Microsoft Dynamics CRM for Outlook • E-mail management in Microsoft Dynamics CRM for Outlook • Creating Mail Merge Documents • Differences between Outlook Clients • Using Microsoft Dynamics CRM for Outlook with Offline Access
Lab 3.1: Creating an Opportunity from an Outlook Appointment
• 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 3.2: Using Microsoft Dynamics CRM for Outlook with Offline Access
• Perform offline and online synchronization.

After completing this module, students will be able to:

- Examine the benefits of the Microsoft Dynamics CRM for Microsoft Office Outlook clients.
- Review the features of Microsoft Dynamics CRM that appear in Microsoft Office Outlook after installing the Microsoft Dynamics CRM for Microsoft Office Outlook client.
- Explain 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.
- Use Mail Merge to create personalized form documents.
- Review the functionality available when working offline and online.
- Describe how contacts, e-mail, appointments, and tasks synchronize between Outlook and Microsoft Dynamics CRM.

Module 4: Introduction to Sales Management

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. Also described is how you can use Microsoft Dynamics CRM to work with qualified customers to make a sale. This module goes runs a complex sale process and discusses leads in detail, and how 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. Also explained is

Lessons
• Sales Management Overview • Tracking Competitors • Managing Sales Literature • Introduction to Leads • Creating and Importing Leads • Tracking and Converting Leads • Disqualifying and Reactivating Leads • Reporting on Leads • Introduction to Opportunities • Creating Opportunities • Working with Opportunities • Tracking Opportunities through a Sales Process • Closing Opportunities • Using the Sales Pipeline Report
Lab 4.1: Create Competitors
• Using the competitor form.
Lab 4.2: Creating Leads
• Create a staged Sales Process workflow for opportunities
Lab 4.3: Qualify and Convert Leads
• Create activities and tasks, and then qualify and convert a lead.
Lab 4.4: Creating a Sales Process
• Create a staged sales process workflow.
Lab 4.5: Completing a Sales Process
• Complete activities for an opportunity forward to the closing stage.

After completing this module, students will be able to:

- Explain the fundamental elements of the sales process.
- Discuss when and how to use the Competitors feature.
- Identify when and how to use the Sales Literature area.
- Discuss when to use leads to qualify or disqualify opportunities.
- Manually create leads and import leads from a file into Microsoft Dynamics CRM.

- Qualify leads, track leads in activities, and convert leads to accounts, contacts, and opportunities.
- Disqualify leads that will not result in sales and reactivate leads that have been disqualified.
- View reports about leads.
- Identify when to use opportunities.
- Create opportunities.
- Work with opportunities by applying sales processes, adding activities, viewing sales literature, and adding products and competitors.
- Use sales process workflows for pipeline reporting.
- Close opportunities.
- Examine the importance of the Sales Pipeline report.

Module 5: Sales Order Processing

This module explains 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. This module explains how to process a sales order in Microsoft Dynamics CRM 4.0. It covers quotes, orders, and invoices, and describes the features in Microsoft Dynamics CRM that are used to analyze the data captured in the system. Also described is how the Export to Excel feature enables both static copies and dynamic queries of data to be viewed and evaluated in Microsoft Excel.

Lessons
• Completing the Sales Transaction • Product Catalog • Unit Groups • Adding Products • Creating Price Lists • Creating Discount Lists • Creating and Revising Quotes • Creating and Tracking Orders • Creating and Closing Invoices • Evaluating Sales Data • Measuring Performance with Sales Productivity Reports • Using Export to Excel • Using the Report Wizard
Lab 5.1: Create a Unit Group and Price List
• Create a unit group • Create a price list
Lab 5.2: Convert a Quote to an Order
• Convert a quote to an order.
Lab 5.3: Sales Productivity
• Use Advanced Find to locate information for a report.

After completing this module, students will be able to:

- Review what constitutes a complete sales transaction.
- Identify the role and functions of the product catalog
- Define how unit groups unit groups will be used to collect the different measurements that your products are available in.
- 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.
- Identify 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.
- Describe the tools used 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 a Microsoft® Office Excel® spreadsheet using the Export to Excel feature.
- Use the Report Wizard to create reports.

Module 6: Introduction to Marketing Management

This module describes 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 including: closed loop marketing, quick campaigns, marketing campaigns, and campaign responses and reporting. This module also explains the process for creating quick campaigns, marketing campaigns, marketing lists, and campaign templates in Microsoft Dynamics CRM.

Lessons
• Benefits of Closed Loop Marketing • Marketing Campaigns vs. Quick Campaigns • Quick Campaigns • Marketing Campaigns • Creating a Marketing Campaign • Creating and Using Marketing Lists • Creating and Using Campaign Templates • Managing Campaign Responses • Analyzing Campaigns
Lab 6.1: Quick Campaigns
• Create a quick campaign.
Lab 6.2: Create a Marketing Campaign
• Create a marketing campaign.

After completing this module, students will be able to:

- Examine the benefits of closed loop marketing.
- Identify when to use a quick campaign and when to use a marketing campaign.
- Examine the purpose of quick campaigns and the key steps to create one.

- Review the purpose and elements of marketing campaigns.
- Identify the way campaign results can be captured.
- Discuss the analysis and reporting available for campaigns.
- Create a marketing campaign.
- Create and use marketing lists.
- Create and use campaign templates.
- Demonstrate how to create a marketing campaign.

Module 7: Implementing 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
• Distribute Campaign Activities • Monitoring Marketing Campaigns • Capturing and Viewing Campaign Responses • Working with Campaign Responses • Analyzing Marketing Information
Lab 7.1 Create a Campaign Response
• Locate information regarding a campaign that is specific to a customer.

After completing this module, students will be able to:

- Distribute Campaign Activities.
- Monitor the status of a campaign.
- Capture campaign responses.
- Manage campaign responses.
- Analyze the results of a marketing campaign using reports

Module 8: Introduction to 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. It explains the lifecycle and key concepts of contracts in Microsoft Dynamics CRM, and explains how to create contract templates, and how to modify contracts and how to delete, cancel, renew, or put a contract on hold.

Lessons
• Getting Started with Service Management • Subject Trees • Service Management Process Flow • Contracts • Creating Contract Templates • Creating a Contract and Contract Lines • Modifying Contracts and Contract Lines • Renewing Contracts • Working with Contracts
Lab 8.1: Creating Contracts and Contract Lines
• Create a contract, add contract lines, and invoice the contract.

After completing this module, students will be able to:

- Review the service management tools available in Microsoft Dynamics CRM.
- Explain how a subject tree works and how it relates to service management cases.
- Examine the service management process flow.
- Demonstrate how the service management process flow helps organizations manage and resolve cases.
- Identify the central concepts and life cycle of contract management in Microsoft Dynamics CRM.
- Work with contract templates.
- Create contracts and contract line items.
- Modify contracts and contract lines.
- Renew contracts.
- Explain contract ownership and identify how cases work with contracts.

Module 9: Managing Service 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 also 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 • Accepting Cases • Maintaining Cases • Resolving Cases • Sharing Cases • Reactivating Cases • Canceling and Deleting Cases • Case Management Reports
Lab 9.1: Case Creation and Resolution
• Create a case and then resolve a case.

After completing this module, students will be able to:

- Examine the concepts governing cases and the resolution process for a case.
- Access and view cases in Microsoft Dynamics CRM.
- Discover how to create a new case or convert an activity to a case.
- Assign and reassign cases to customer service representatives.
- Accept cases from a Queue.
- View, edit, and work on cases.
- Explain when and how to resolve cases and how to resolve cases using the knowledge base.
- Describe why and how to share cases with others.
- Reactivate cases that have been resolved.
- Review when and how to cancel and delete cases.
- Identify the types of reports related to case management.

Module 10: Microsoft Dynamics CRM Knowledge Base

This module explains how to use the Microsoft Dynamics CRM Knowledge Base, and discusses how organizations can browse, locate, and share information using this repository. Also discussed is how Microsoft Dynamics CRM service queues work, including how to create public queues and routing rules for queues, the process of deleting queues, viewing the list of cases and activities in queues, and how to accept and assign items from queues.

Lessons
• Knowledge Base Concepts • Working with Article Templates • Creating and Submitting Articles • Approving, Publishing, and Rejecting an Article • Finding Information in the Knowledge Base • Queues • Setting Up Public Queues • Deleting Queues • Working with Queues
Lab 10.1: Creating, Submitting, and Publishing Knowledge Base Articles.
• Create, submit and publish a Knowledge Base article
Lab 10.2: Creating and Assigning Queues
• Create a queue and assign some cases to it.

After completing this module, students will be able to:

- Explain 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.
- Review the basics of queues and the flow of cases and activities through queues.
- Create public queues and routing rules for them.
- Delete queues.
- Work with queues, including assigning items and accepting them.

Module 11: Introduction to Service Scheduling

This module explains the basic service scheduling process and service scheduling activities in detail.

Lessons
• Service Scheduling Overview • Service Scheduling Scenarios • Service Scheduling Process • Navigating and Booking Service Activities in the Service Calendar • Scheduling Service Activities • Close, Cancel, or Reschedule a Service Activity • View Service Activities and Appointments •
Lab 11.1: Following Up on Appointments
• Follow up on appointments.

After completing this module, students will be able to:

- Introduce key service scheduling concepts
- Compare service business scenarios
- Review the service scheduling process flow in Microsoft CRM
- Navigate and book service activities in the Service Calendar.
- Examine service activities.
- Close, cancel, or reschedule a service activity.
- View service activities and appointments.

Module 12: Service Scheduling Administration

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

Lessons
• Scheduling Appointments • Scheduling Users and Other Resources • User Work Schedules • Creating a Group of Resources to Schedule Together • Manage How Resources are allocated for Service Activities • Creating and Managing Sites • Managing Business Closures •
Lab 12.1: Document Time Off for a User
• User work schedules.
Lab 12.2: Create Business Closures
• Create a business closure time.

After completing this module, students will be able to:

- Review 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.
- Remove resources from the scheduled services.
- Create, edit, or add members to a site.
- Set or edit business closures.