

MOC 80545 - Customer Service in Microsoft Dynamics CRM 2013

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Course duration

- 1 Days

Course Outline

This Customer Service in Microsoft Dynamics CRM 2013 training class 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.

This course is intended for individuals that plan to implement, use, maintain, or support Microsoft Dynamics CRM 2013 in their organization. The training is intended for customer service representatives, service schedulers, administrators, office managers, CEOs, and consultants who want to gain foundational knowledge of the application functionality.

- Learn to identify the key set of terms, phrases and elements to effectively work with Customer Service Scenarios and Terminology.
- Learn to recognize why cases are the fundamental record type in service management, and represent a single incident of service.
- Learn to use Queues to organize and store Activities and Cases that are waiting to be processed.
- Learn to effectively search the Knowledge Base to access a repository of informational articles used to assist customer service representatives in the resolution of cases.

- Learn to utilize Contract Management to specify the amount of support services a customer is entitled to.
 - Learn to use reporting functionality to gain insight into trends, performance, and identifying opportunities and potential issues.
 - Learn to practice Goal Management features to establish and track progress against target values for key performance indicators.
 - Learn to use the Service scheduling functionality and how it is designed to assist organizations when providing services that require complex combinations of resources. .
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- General knowledge of Microsoft Windows.
 - General knowledge of Microsoft Office.
 - An understanding of Customer Relationship Management solution processes and practices.

1. Introduction

1. Customer Scenarios
2. Customer Service Entities and Record Types

2. Cases

1. Creating Case Records
2. Understanding the Process Ribbon and Menu Options
3. Case Resolution, Canceling and Deleting
4. Assigning Case Records
5. Other Actions on Cases From Forms and Views
6. Working with the Subject Tree
7. Working with the Case List and Views
8. Lab: Case Resolution Processing
9. Case Resolution Processing

3. Knowledge Base

1. Article Templates
2. Creating, Approving and Publishing Articles
3. Using and Searching the Knowledge Base
4. Cases and Knowledge Base Articles
5. Sending Knowledge Base Articles
6. Lab: Managing Knowledge Base Articles

4. Queue Management

1. Queue Management
2. Lab: Create and Manage Queues

5. Contracts

1. Contracts and Contract Templates
2. Creating and Working with Contracts
3. Using Contracts with Cases
4. Lab: Resolving a Case with a Contract

6. Analysis, Reports and Goals

1. Customer Service Reports
2. Customer Service Charts and Dashboards
3. Customer Service Goals and Metrics
4. Lab: Goals and Goal Metrics

7. Service Scheduling

1. Service Scheduling Scenarios
2. Service Scheduling Terminology
3. Service Scheduling Process
4. Resources, Services and Selection Rules
5. Include Customer Preferences
6. Understand Sites and Same-Site Requirements
7. Manage Business Closures
8. Explain the Service Activity Scheduling Engine
9. Working with Service Activities and the Service Calendar
10. Close, Cancel, or Reschedule a Service Activity
11. Lab: Schedule a Service by Using a Same-Site Requirement

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