T4CRM032 - CRM 2016 In 5 Days Flat

Duration: 5 Days   Course Code: T4CRM032

Overview:

This course takes an accelerated approach to covering all the major aspects of Microsoft Dynamics CRM, including utilising CRM's Sales, Services and Marketing applications, managing and customising the CRM system to meet specific business requirements, creating and importing automated processes including Workflows and Business Rules.

Target Audience:

This course is intended for individuals that plan to implement, use, maintain, or support Microsoft Dynamics CRM 2016 in their organization. The training is intended any individuals focused on utilising CRM, including sales representatives, customer service representatives, service schedulers, administrators, office managers, CEOs, and consultants who want to gain a full and complete knowledge of CRM's adaptability and functionality for specific and general business requirements

Prerequisites:

Before attending this course, students must have:

■ General knowledge of Microsoft Windows.
■ General knowledge of Microsoft Office.

Content:

PART ONE

Module 1: Microsoft Dynamics CRM Concepts

- Microsoft Dynamics CRM functionality
- Microsoft Dynamics CRM clients
- Microsoft Dynamics CRM records
- Application navigation

Module 2: Working with the Application

- Customer records
- Addresses
- Personal options

Module 3: Introduction to Sales Management

- Customer Scenarios
- Basic Record Types

Module 4: Lead Management

- Lead to Opportunity Process Form and Process Ribbon
- Convert Activity Records to Leads
- Qualifying and Disqualifying Leads
- Create, Maintain, and Use Sales Literature
- Create, Maintain, and Use Competitors
- Lab: Create and Disqualify a Lead

Module 5: Working with Opportunity Records

- Create Opportunities and Work with Opportunity Form
- Changing Opportunity Status
- Lab: Managing Sales Opportunities
- Create, work with, close, and reopen Opportunity records.
- Describe the different statuses of an opportunity.
- Use the assign functionality in Microsoft Dynamics to assign opportunities to other users.
- Manage opportunities from system views.

Module 6: Working with the Product Catalog

- The Microsoft Dynamics CRM Product Catalog
- Unit Groups
- Adding and Maintaining Products
- Creating, Maintaining and Using Price Lists
- Currency Management
- Creating a Price List
- Lab: Managing the Product Catalog
- Create Currency
- Create a Unit Group associated with the Currency
- Create a Product
- Create a Price List and Price List Item Tied to the Currency

Module 7: Sales Order Processing

Module 11: 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

Module 12: 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.

Module 13: Queue Management

- Queue Management
- Lab: Create and Manage Queues
- Create a New Public Queue for Incoming Questions

Module 14: 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

Module 15: Analysis, Reports and

- Customer Service Charts and Dashboards
- Customer Service Goals and Metrics
- Lab : Goals and Goal Metrics
- Modify a Goal Metric to Include in-Progress Cases

Module 16: Service Scheduling

- Service Scheduling Scenarios
- Service Scheduling Terminology
- Service Scheduling Process

Module 3: Customizing Entities

- Entity Customization Concepts. Create a Custom Entity. Additional Entity Properties. Modifying the Configuration of an Entity.
- Lab : Create Custom Entities
- Lab : Create a Custom Activity Entity

Module 4: Customizing Fields

- Field Data Types. Field Display Formats. Field Properties. Customise Existing Fields. Configure Option Sets. Status and Status
- Reason Fields. Delete Fields.
- Lab: Create and Modify a Global Option Set

Module 5: Managing Relationships

- Types of Entity RelationshipsCreate Entity Relationships1:N Relationship BehaviorField Mappings in 1:N
- RelationshipsConnections and Connection Roles.
- Lab : Create New Relationships Lab : Customize Relationship Mappings

Module 6: Customising Forms

- Form Customisation Overview. Create and Modify Forms. Quick Create and Quick View Forms. Manage Multiple Forms. Mobile
- Clients.
- Lab : Modify Form Layout and Add Fields Lab : Create a Role-Based Form for the Competitor entity.

Module 7: Configuring Business Rules

- Configure Business Rules
- Lab : Create a Business Rule

Module 8: Customising Views

- View Customisation Concepts. System Views. Create Custom Views. Remove Unwanted Views.
- Lab : Modify a Quick Find View
- Lab : Create Custom Views

Module 9: Customising Charts and Dashboards

- Create and Modify Charts. Export and Import Charts. Create and Modify Dashboards.
- Lab : Create a Custom Chart
- Lab : Create a Dashboard

Module 10: Additional Security Options

- Adding Line Items (Opportunity Products) to Opportunities
- Quote Management
- Working with Orders
- Working with Invoices
- Lab: Sales Order Process

Module 8: Metrics and Goals

- Configuring Goal Metrics
- Configuring Fiscal Periods
- Creating and Assigning Goal Records
- Creating and Recalculating Parent and Child Goal Records
- Creating a Rollup Query
- Lab : Goal Management for Individuals
- Implement a Goal Metric

Module 9: Sales Analysis

- Running Built-in Reports
- Exporting Sales Information to Excel
- Working with Charts and Dashboards
- Working with System Charts from the Opportunity List
- Working with Dashboards
- Create a New Dashboard in the Workplace
- Sharing DASHBOARDS, Charts and Advanced Find Queries
- Lab: Create a New Personal, Sales Dashboard
- Create an advanced find query
- Create a chart.
- Create a dashboard, and add the advanced find query and chart to it.
- Share the dashboard.

Module 10: Introduction to Services Management

- Customer Scenarios
- Customer Service Entities and Record Type

- 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
- Create a Service Activity based on a Same-Site Requirement Service.

Module 17: NEW IN CRM 2016 SALES AND MARKETING

- Use of pre-formatted Excel templates to quickly create Excel documents directly from CRM
- One click easy generation of documents from CRM using role based pre-defined Word templates
- SMS marketing including inbound and outbound campaigns Next generation Cortana integration for sales teams
- Interactive generation of HTML in emails
- New CRM app for Outlook included expand support to include Firefox, Safari for Mac and Outlook for Mac ......and lots more new features we can reveal when CRM 2016 ships!

Module 18: NEW IN CRM 2016 SERVICES!

- New interactive service hub dashboards and formshelp you prioritize workloads
- Use of pre-formatted Excel templates to quickly create Excel documents directly from CRM.
- One click easy generation of documents from CRM using role based pre-defined Word templates.
- Next generation Cortana integration for service teams.
- Interactive generation of HTML in emails.

PART TWO

Module 1: Introduction to Customising Microsoft Dynamics CRM 2016

- Customisation or Development? Introduction or Entity Customisation.
- Lab: Create a Solution and publisher

Module 2: Building a Security Model in Microsoft Dynamics CRM 2016

- Introduction to Business Units. Overview of Security Roles. User Management Overview. Team Management Overview,
- Teams and Sharing. Manage Security

- Field Security. Access Team Templates. Auditing Overview
- Lab : Configure Field Security
- Lab : Create and Configure an Access Team Template

Module 11: Business Process Flows

- Business Process Flows
- Lab : Create a Multi-Entity Business Process Flow

Module 12: NEW IN CRM 2016!

- Next generation search to make Search simpler, and faster!
- Document management improvements.
- Solution enhancements.
- Interactive Service Hub including Multi-stream and Single-stream Dashboards.
- External Party Access enhancements to the CRM API and SDK.
- App-to-app deep linking.
- Web Resources and IFRAME enhancements.
- Data Performance Dashboard optimization recommendations.
- Bulk Data Loader for CRM Online including recurring data import/export.
- Modern web API enhancements including open industry standard OData v4.

Roles for Users and Teams.
- Lab: Configure Security Roles
- Lab: Configure User Access

Further Information:

For More information, or to book your course, please call us on Head Office 01189 123456 / Northern Office 0113 242 5931

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