Microsoft CRM 2016 Customer Service

Duration: 1 Day   Course Code: T4CRM036

Overview:

This course introduces the capabilities of Service Management in Microsoft Dynamics CRM 2016. Focuses on how an organization can nurture customer satisfaction through automation of business processes within Microsoft Dynamics CRM 2016. Provides an insight into all of the powerful Customer Service and Service Scheduling functionality capabilities within Microsoft Dynamics CRM 2016. Guides you through the process of working with your customers in Microsoft Dynamics CRM 2016, including: resolution of customer complaints and services issues cost effectively, and provides insight on managing all related correspondence, documents, contacts and conversations.

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 for customer service representatives, service schedulers, administrators, office managers, CEOs, and consultants who want to gain foundational knowledge of the application functionality.

Objectives:

- Understand the context of Service Management and review real-life service scenarios.

- Identify how Goal Management enables organizations to manage and analyze performance.

- Use the service analysis tools that Microsoft Dynamics CRM provides analyze and report on service-related information

- Identify the key set of terms, phrases and elements to effectively work with Customer Service Scenarios and Terminology

- Recognize why cases are the fundamental record type in service management, and represent a single incident of service.

- Use Queues to organize and store Activities and Cases that are waiting to be processed.

- Effectively search the Knowledge Base to access a repository of informational articles used to assist customer service representatives in the resolution of cases.

- Utilize Contract Management to specify the amount of support services a customer is entitled to.

- Use reporting functionality to gain insight into trends, performance, and identifying opportunities and potential issues.

- Practice Goal Management features to establish and track progress against target values for key performance indicators.

- Use the Service scheduling functionality and how it is designed to assist organizations when providing services that require complex combinations of resources.

Prerequisites:

- General knowledge of Microsoft Windows.
- General knowledge of Microsoft Office.
- An understanding of Customer Relationship Management solution processes and practices.

Content:

- Microsoft Dynamics CRM functionality
- Microsoft Dynamics CRM clients
- Microsoft Dynamics CRM records
- Application navigation
- Customer records
- Addresses
- Personal options
- Customer Scenarios
- Customer Service Entities and Record Types
- 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
- 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.
- Queue Management
- Lab: Create and Manage Queues
- Create a New Public Queue for Incoming Questions
- 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
- 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
- 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
- Create a Service Activity based on a Same-Site Requirement Service.
- New interactive service hub dashboards and forms help 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.

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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