

## 80545 - Customer Service in Microsoft Dynamics CRM 2013

Duration: 1 day

### Overview:

This course focuses on how an organisation 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.

[Read more...](#)

### Target Audience:

This course is intended for individuals that plan to implement, use, maintain, or support Microsoft Dynamics CRM 2013 in their organisation. 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.

### Pre-requisites:

Before attending this course, students must have:

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

### At Course Completion:

After completing this course, students will be able to:

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

[Read more...](#)

### Module 1: Introduction

#### Lessons

- Customer Scenarios
- Customer Service Entities and Record Types

### Module 2: Cases

#### Lessons

- 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 3: Knowledge Base

#### Lessons

- 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 4: Queue Management

#### Lessons

- Queue Management

#### Lab : Create and Manage Queues

- Create a New Public Queue for Incoming Questions

### Module 5: Contracts

#### Lessons

- 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 6: Analysis, Reports and Goals

#### Lessons

- 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

### Module 7: Service Scheduling

#### Lessons

- 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