## **Microsoft** Services



## Application

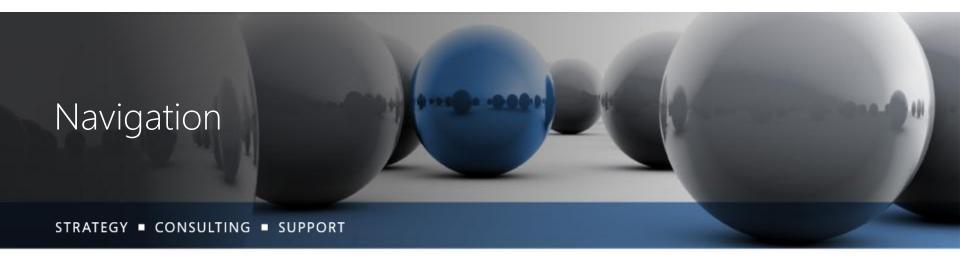
- Application What's New
  - Navigation
  - Forms and Views
  - Grid
- Sales
  - What is the Sales Module
  - Accounts, Contacts and Leads
  - Opportunities
  - Sales Literature
  - Orders, Quotes and Invoices
  - Goals and Metrics
  - Connections



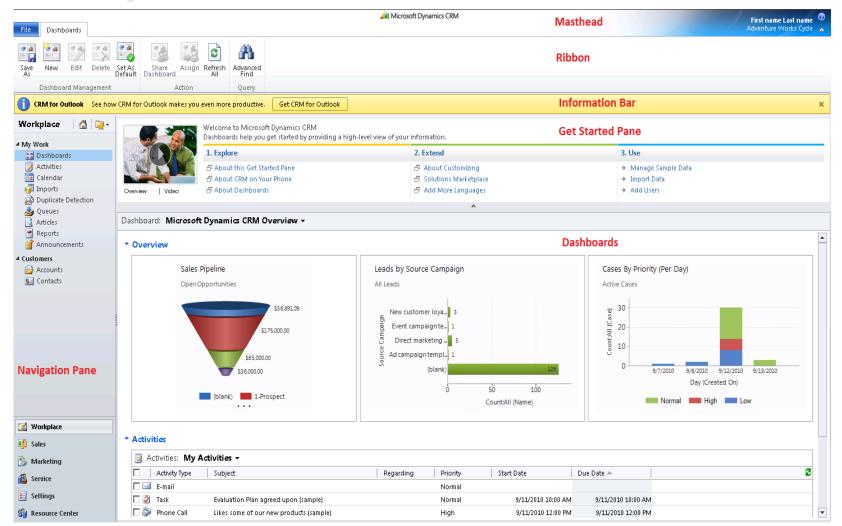
## Application (Cont.)

- Service
  - What is the Service Module
  - Cases
  - Knowledge Base
  - Queues
  - Product Catalog
  - Contracts
  - Service Scheduling
- Marketing
  - What does the Marketing Module
  - Campaigns/Quick Campaigns
  - Dynamics Lists

## **Microsoft** Services







#### Ribbon

- Ribbon Commands on the Grid
- Enhanced Tooltips
- Hide the Ribbon



#### Get Started Panes

- Relevant Information
- Can be replaced with custom content
- Hide or Disable



Welcome to Microsoft Dynamics CRM

Dashboards help you get started by providing a high-level view of your information.

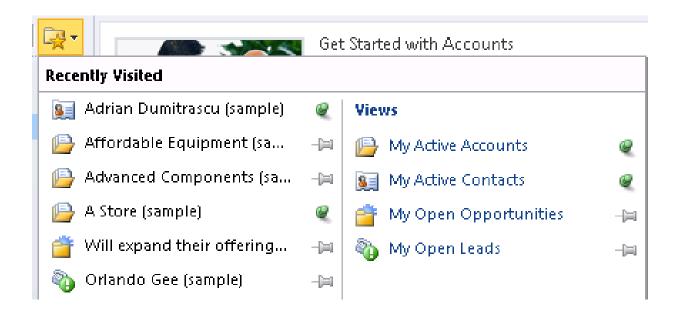
1. Explore	2. Extend	3. Use
<ul><li>♂ About this Get Started Pane</li><li>♂ About CRM on Your Phone</li><li>♂ About Dashboards</li></ul>	<ul><li>About Customizing</li><li>Solutions Marketplace</li><li>Add More Languages</li></ul>	<ul><li>→ Manage Sample Data</li><li>→ Import Data</li><li>→ Add Users</li></ul>

#### Most Recently Used

- Recently Visited
- Shortcut Menu for Views and Records
- Record Set Navigation (Lesson 2)
- Default Views and Sticky Views

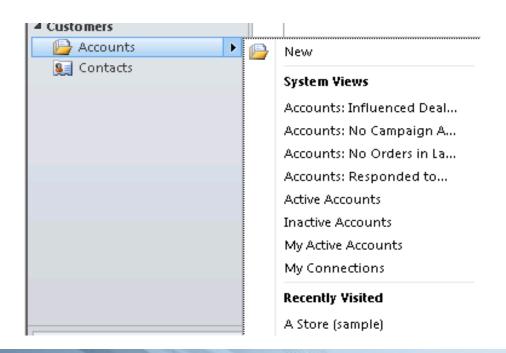
#### Recently Visited

- List of Recently viewed records and views
- Available in Outlook
- Pin Items



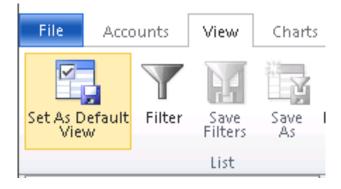
#### Shortcut Menu for Views and Records

- Open a selected view directly
- Lists All System and Personal Views
- Create New Records
- Contains six last visited records



#### **Default Views**

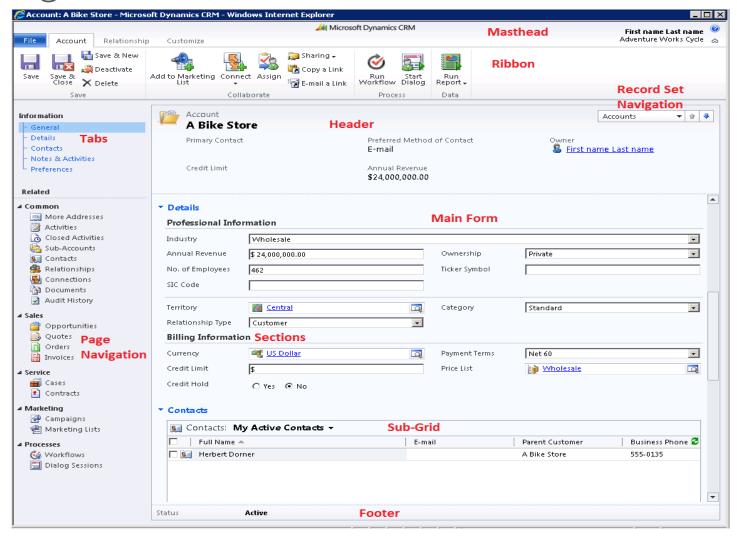
- User Selected Default Views
  - Per User
  - Per Entity
  - Saved to Database
- Sticky Views
  - Per Session Only



## **Microsoft** Services

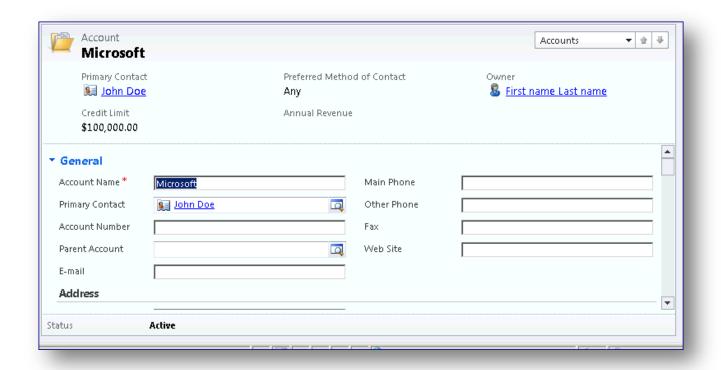


## Page



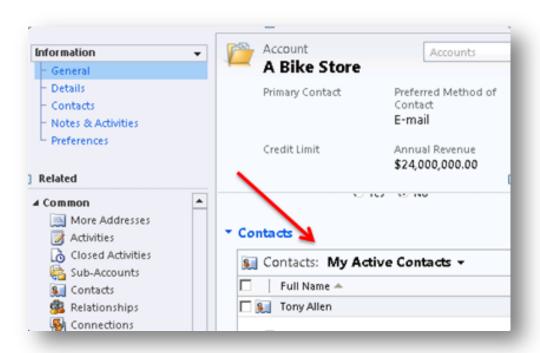
## Header and Footer

- Maintain Rich Context
- Read Only View of Data



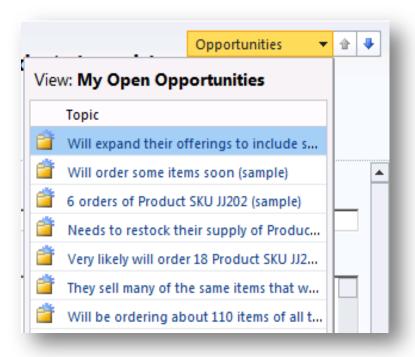
#### Sub-Grids

- Entity Grids added to a form
- Four sub-grids loaded when form is loaded
- Use Entity Level Views



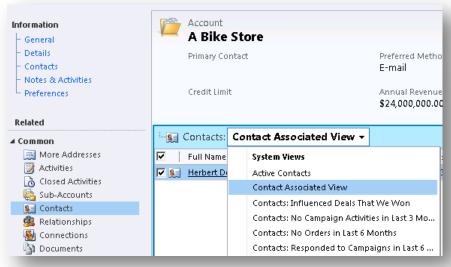
## Record Set Navigation

- Navigate to next records within the form
- Maintain Same order as List



## Associated Views and Lookup Views

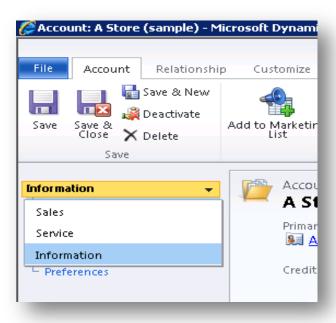
- Entity Grid views available
- Not limited to one associated view or Lookup view





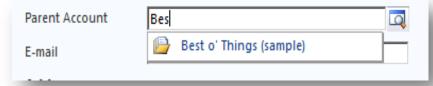
## Role Based Forms

- Multiple Forms per Entity
- Limit the fields a user needs to see



## Lookup – Most Recently Used and Form Assistant

- Most Recently Used (MRU)
  - Allows for quick data entry on lookup fields



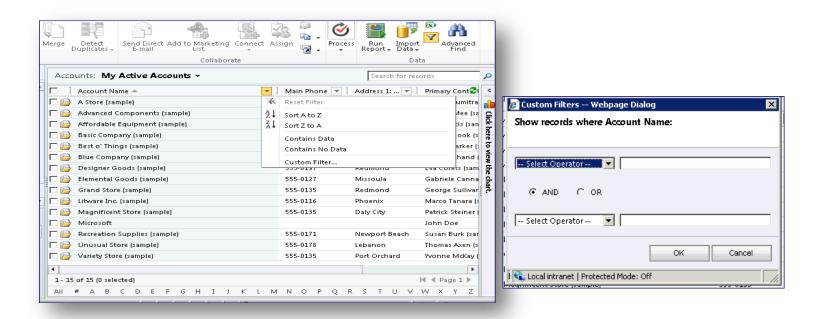
- Form Assistant has been removed in most areas
  - Still available for Products

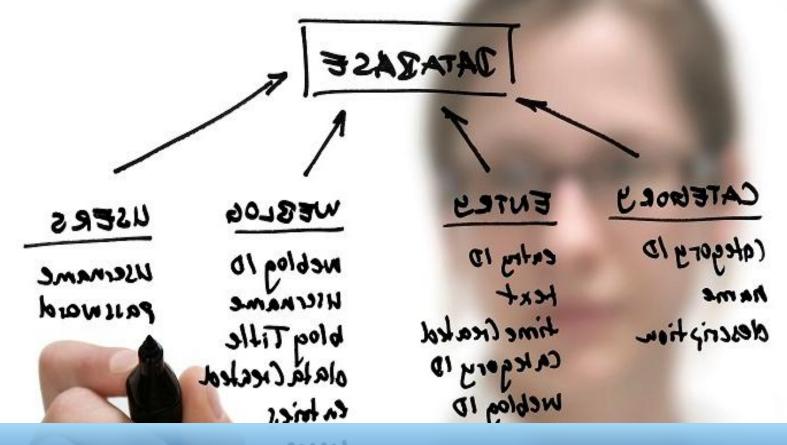
## *Microsoft* Services



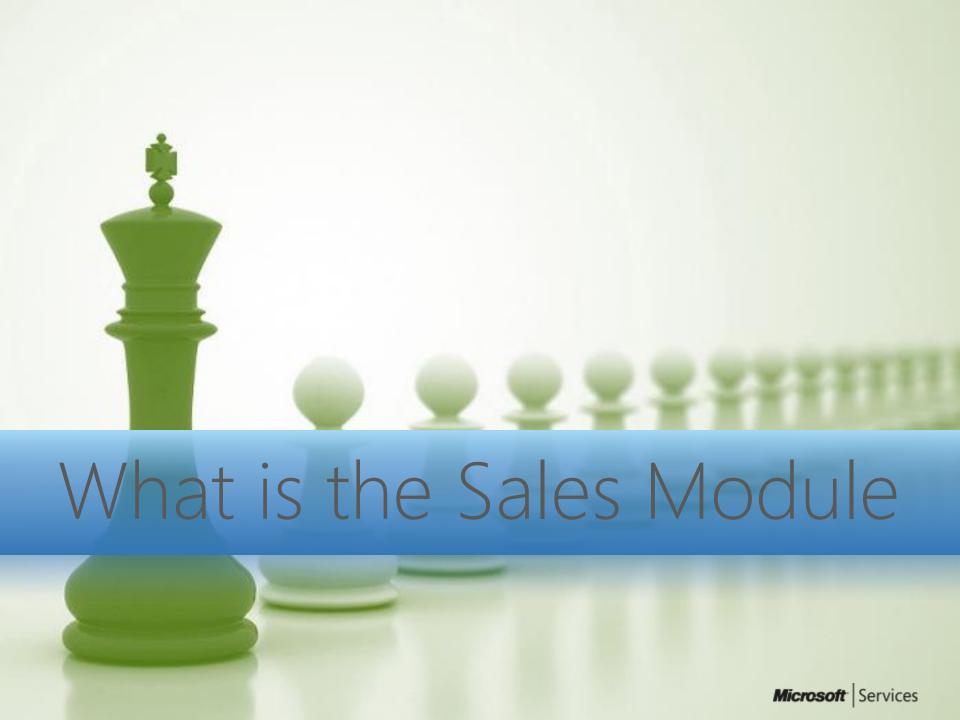
#### Grid

- New Column Filter option
- Custom Filter that allows two filter values
- Integrated filtering with Charts
- Show record counts





# Advanced Find Overview and Lab



#### What is the Sales Module

- Organizations can use sales management functionality to track information about customers, contacts, leads and/or manage order information.
- Organizations can also set Goals and monitor the progress towards those particular goals

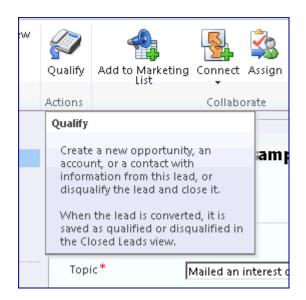


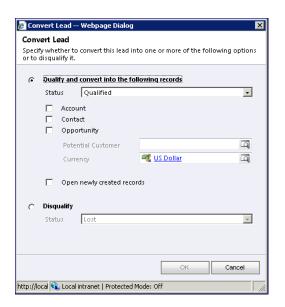
## Accounts, Contacts and Leads

- Accounts represent companies that your organization does business with
- Contacts are people who may or may not represent an account
- Leads are potential or prospective customers

#### Lead Conversion

- Information regarding potential customers are stored as leads.
- Those leads can be converted into Accounts, Contacts and Opportunities once they've been qualified.
- Activities carry over to converted records







## Opportunities

- Opportunities are records that represent potential sale
- Opportunities are not a specific customer, such as a lead, contact, or account, and therefore require a customer record to be added to the opportunity
- Can be converted from a Lead



## Sales Literature

#### Sales Literature

 Sales Literature is a searchable library of sales and marketing materials, including brochures, white papers, and competitor information

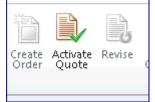


## Quotes

- A draft Quote is a formal offer for products and services, proposed at specific prices and related payment terms which is sent to an opportunity, account, or contact.
- When the quote is ready, it is activated and sent to the customer
- A Quote frequently undergoes several revisions between the salesperson and customer before it is accepted
- Once accepted and Order is generated from the quote.

## Quote Conversion

- Activate the Quote
- Once activated you can click "Revise" to make changes.

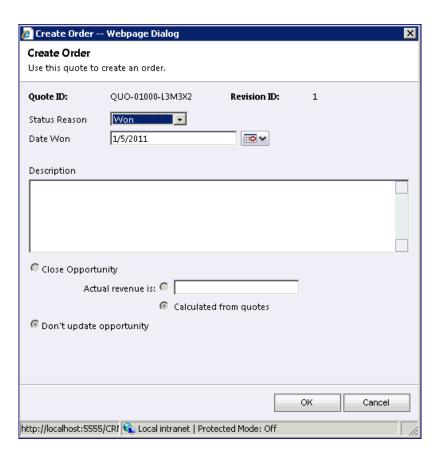


Once the Quote is Activated you can create the Order



## Quote Conversion

Create the Order



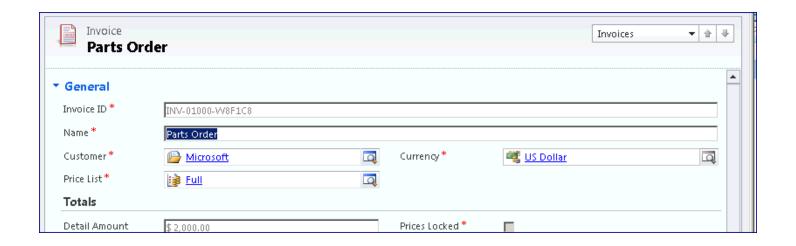
#### Orders and Invoices

- An Order is used to fulfill the agreement of goods and services that were offered in the quote.
- Once the Order is created and sent to the customer an Invoice is created and sent to the customer.

#### Create the Invoice

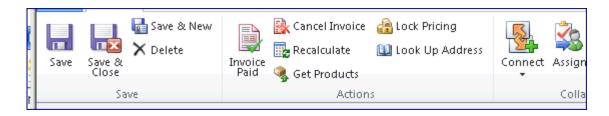
Create the Invoice from the Order

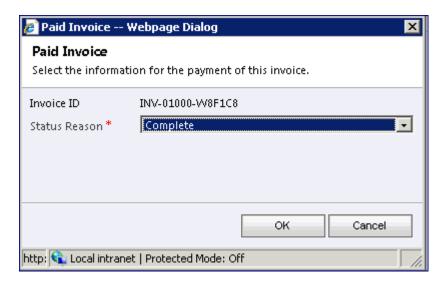




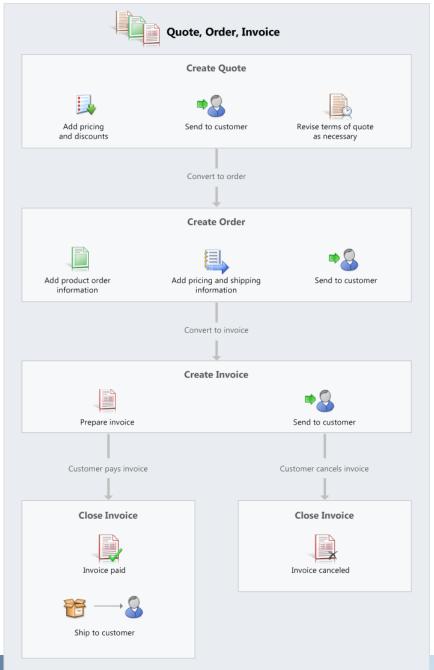
#### Mark Invoice as Paid

Mark Invoice as Paid by clicking the "Invoice Paid" button





#### Process

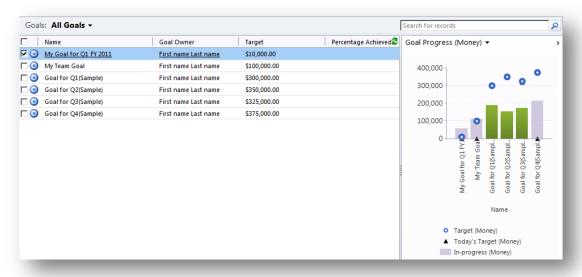




# Goals and Metrics

#### Goals

- Goals are results that can be achieved
  - Manage and Monitor Achievements
  - Units Sold
  - Revenue Earned

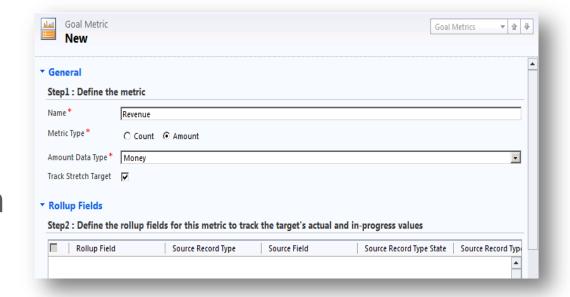


#### Goals

- Goal Metrics
  - Metric Types
  - Rollup Fields
- Rollup Query
  - Query to collect the data
- Goal
  - What is the target, Who is accountable, What is the time period

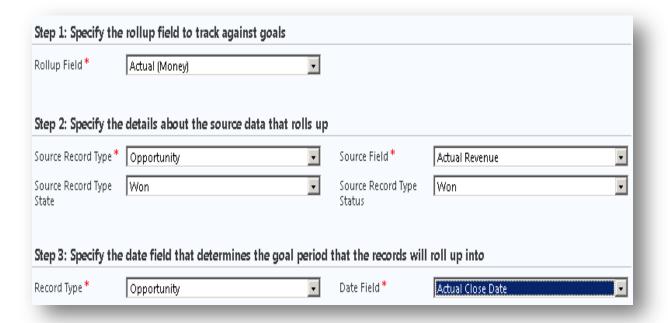
#### Goals

- Metric Type for Goal
  - Amount
    - Money
    - Decimal
    - Integer
  - Count
    - Integer
- Track StretchTarget



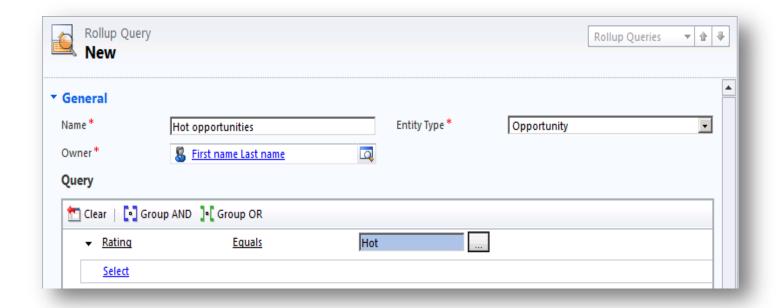
### Rollup Fields

Used To Select What Fields To Pull Data For The Goal (max of 3 per goal)



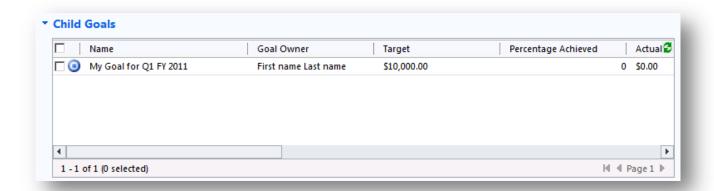
### Rollup Query

Used To Specify The Query To Use In the Goal Rollup



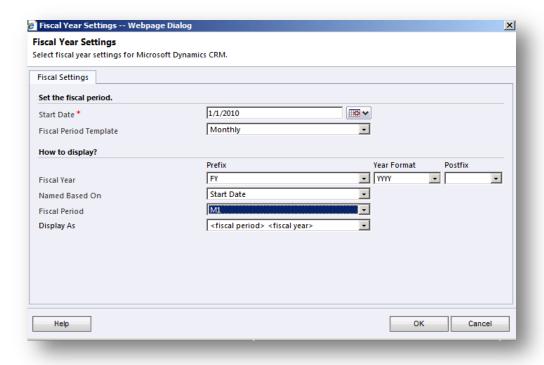
#### Parent and Child Goals

- Monitor Results of Your Sales Team
- Have Team Goals



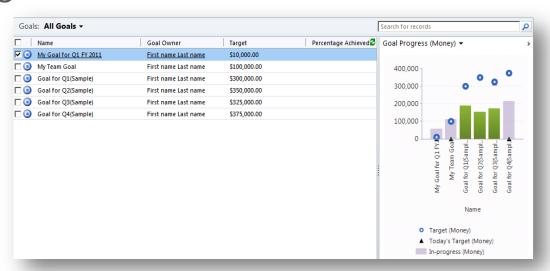
### Fiscal Year Settings

Set Fiscal Year and Fiscal Period Details

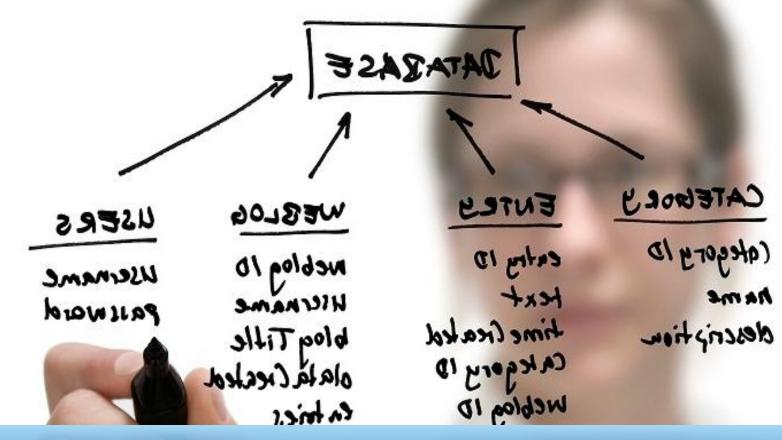


### Fiscal Year Settings

- Monitor progress in Visualization
  - Goal Progress Charts
  - Percentage Achieved Charts



- Monitor progress via Reports
  - Progress Against Goals report

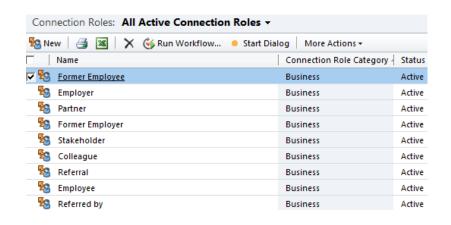


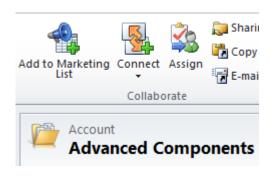
Goal La Detrold

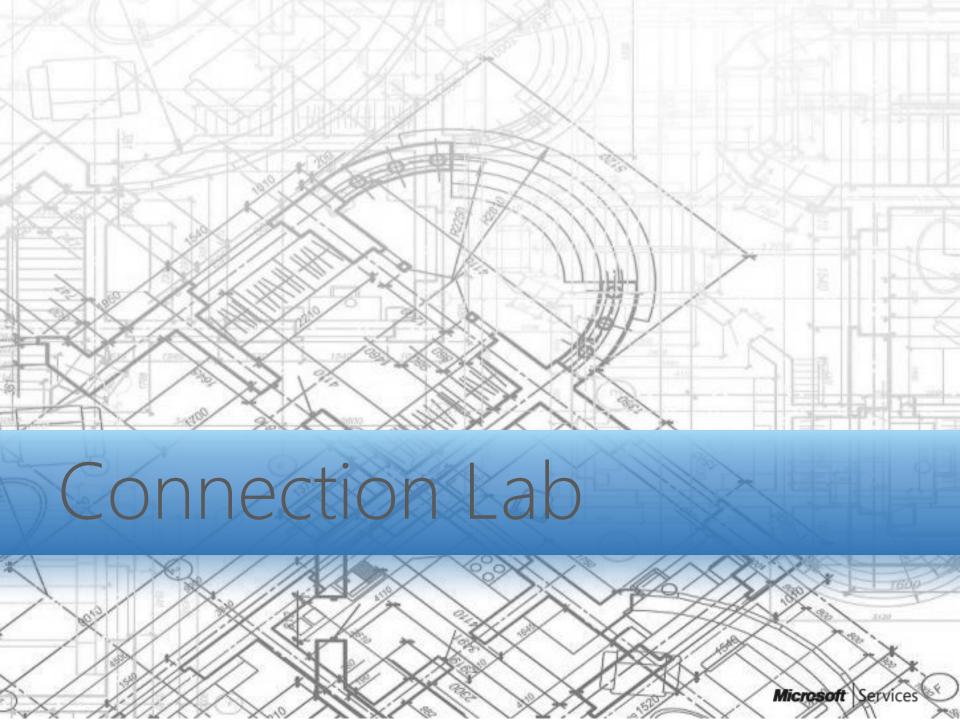


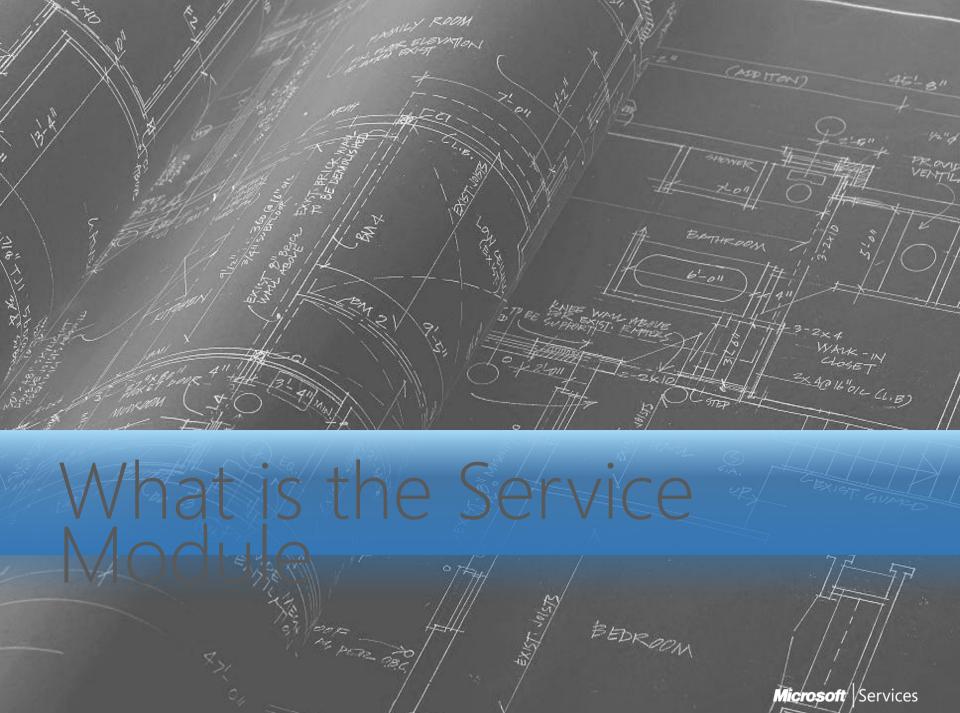
### Connection Roles

- Create and view the relationship between two records by using Connections
- Connection Role Entity
  - Used by the Connection entity to describe the role of one or both of the connected entities









#### What is the Service Module

 Organizations can use service management functionality to track information about cases, customer complaints, requests, and small projects.



Cases

#### Cases

- Cases can be used for many different scenarios:
  - Customer Service Request (computer mouse no longer works)
  - Customer Complaints (driver reports potholes in the road)
  - Small Projects (new reports need to be developed and imported into CRM)
- Allows organizations to use rules based routing for better escalation process and faster resolution times

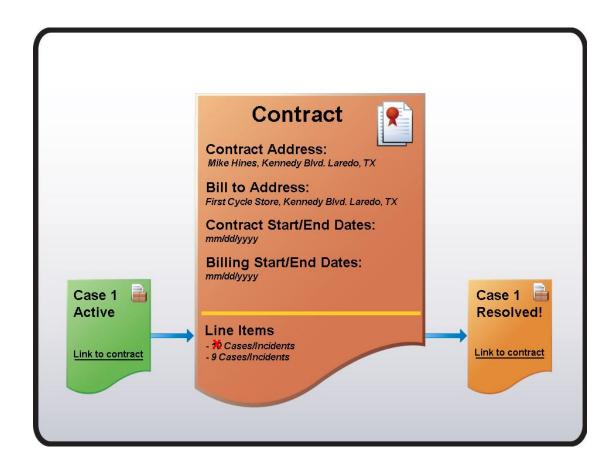
### Subject Trees

- Subject Tree hierarchy of subjects that can be applied to cases and KB articles
- Can be used to help route cases
- Example (auto parts dealer):
  - Parts
    - Engine
      - Spark plugs
      - Filters
      - Belts
  - Wheels
    - Tires
    - Rims

## Assigning Cases

- Cases can be assigned to:
  - User
  - Team
  - Queue

#### Relate Cases to Contracts





#### Contracts

- A Contract is a service agreement associated with a specific product covering a specific date
- There are 3 elements to a Contract:
  - Contract The actual agreement detailing the support
  - Contract Lines Details the specific coverage for various products
  - Contract Template Are created to cover the various types of Contracts written within a specific organization
    - Contract are always created from template

### Creating Contract Templates

A contract template is a framework for creating new contracts. You can use templates to ensure that contracts are consistent across the organization.

- Key Elements
  - Name template name and ID helps users determine whether this is the correct template for the type of contract they are creating
  - Allotment Type type of support
    - Number of cases
    - Time
    - Coverage dates
  - Available Times times when support is available under contract

### Modifying Contracts

- You can modify or delete a contract or a contract line when the contract has a status of Draftbefore it has been invoiced or the contract has begun.
- You cannot delete a contract that is active or has been invoiced, nor can you delete its contract lines. However, you can cancel an active contract.
- You can also change the status of contracts by putting them on hold, canceling them, or reactivating a contract that has been put on hold.

### Renewing Contracts

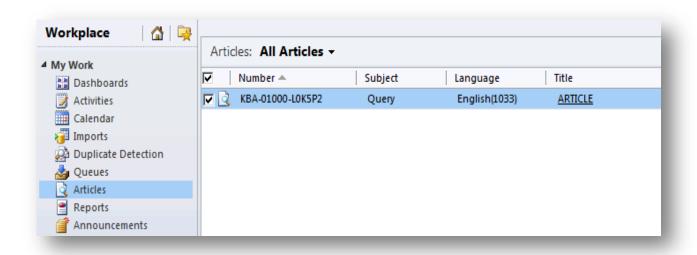
When the end date of a contract passes, the contract expires. You can renew the contract to make it active again and allow cases to be logged against it.

- You can make modifications to the draft contract, including adding or modifying contract lines.
- You also have the option to include contract lines that were canceled from the original contract.
- You can then invoice and activate the renewed contract so that new cases can be logged against it.



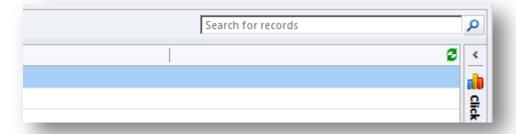
# Knowledge Base

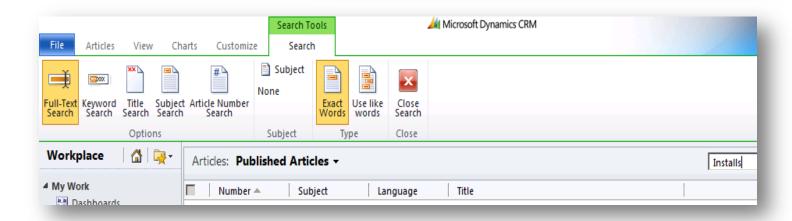
- Is a repository of articles containing problem resolution, best practices or other documentation
- Helps to resolve common issues fast and avoids duplicated efforts



### Search

Searchable with quick find or search tools in the Ribbon





# Accessing Articles

- Articles can be accessed from two places.
  - Workplace | Articles
    - The default view is published articles.
    - When clicking on a published article it will open in HTML view.
  - Service | Knowledge Base
    - The default view is draft articles.
    - When clicking on an article it will open in the Article Editor

### Article Customizations

- New Default Language Column Added
- Ability to Customize Article Entity

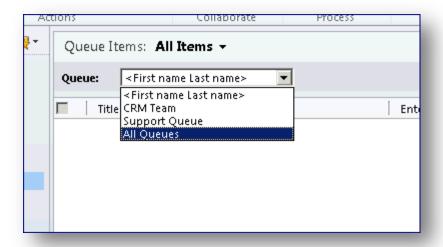


### Queues

- A Queue is a container for a specific work item
  - Cases and all Activities are enabled
  - Other entities can be enabled
- Multiple queues can be used for case routing
- Each User and Team has a Default Queue created with the respective name of the User or Team
- A particular default queue can be changed

#### Security

- Queues are a User Owned Entity
- Visibility of Queues and Queue Items can be limited



#### Default Queues

- User and Team Default Queues
  - Used in Workflows
  - Used with Automatically move records to users default queue

#### Customization

- Enable Entities to be Available for Queues
- Customize Queue and Queue Item Entity



#### Support for Processes

- Queue and Queue Item Entities Can Trigger Workflows
- Assign to Queue in Dynamics CRM 4.0
  - Now two steps in Dynamics CRM 2011
    - Assign to User
    - Add to Queue

#### Queue details

- Queues can have email addresses assigned to them
  - Router will process email for Queue if "approved"
- Assigning an item in a queue will not change the ownership of the Queue Item
  - "Working On" concept so Queue Item can have a different working on user than actual owner
  - User can mark an item as "working on" but leave it in current queue
  - "Items I'm Working On" view
  - "Release" set Worked By to blank so another user can pick it up

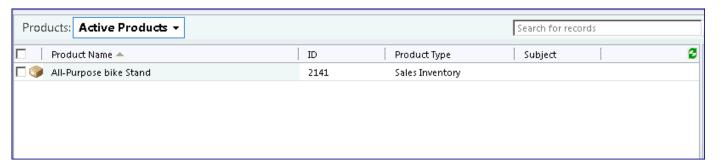
#### Queue details (cont.)

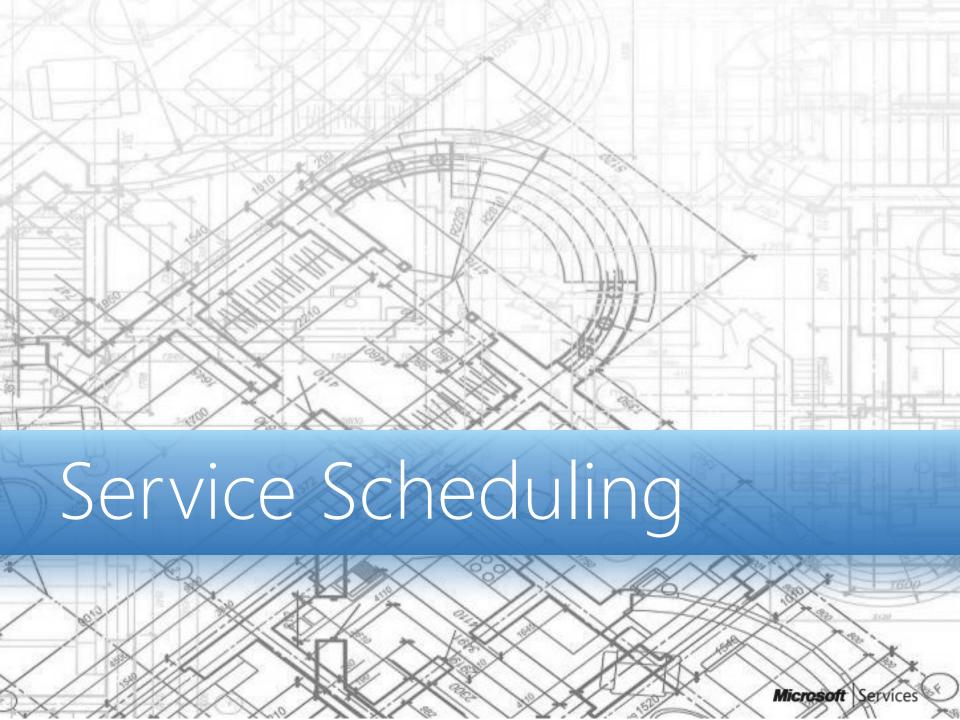
- Routing
  - Queue Routing allows you to move the Queue Items to a different queue and set the Worked By field of the queue item to another user, team or leave it blank
- Marketing Lists
  - Campaigns and Quick Campaigns can have a Queue as the From email address



### Product Catalog

- The Product Catalog lists the products sold by an Organization
- Within the Product Catalog the following options are available:
  - Discount List Lists the specific discounts which can be offered on a product
  - Unit Group Contains the base unit a product is available in
  - Price List Specifies the price each unit in the unit group



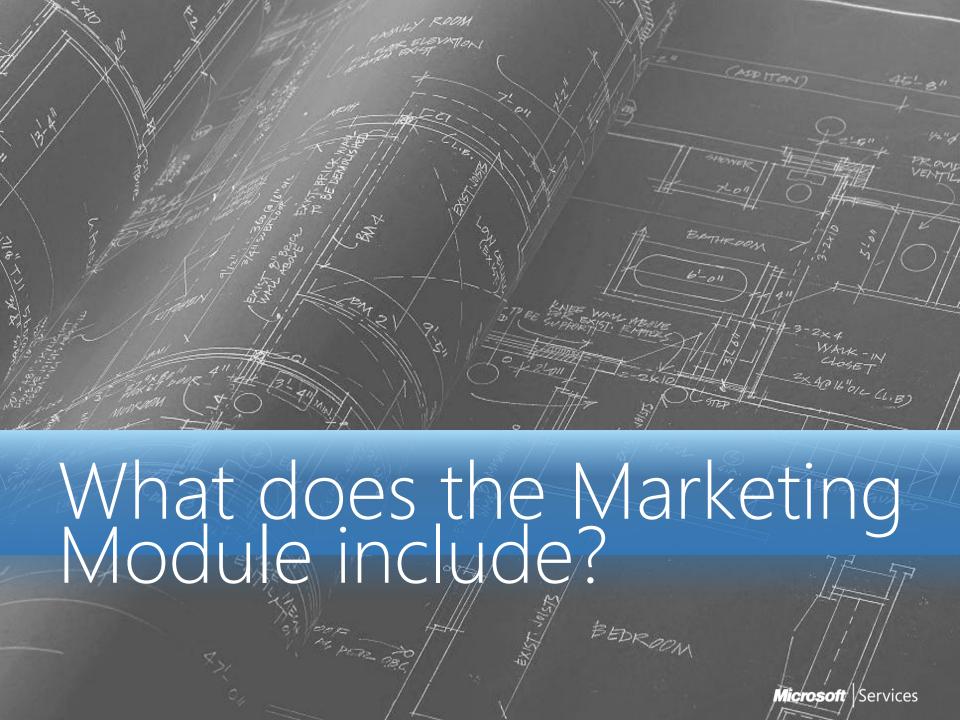


#### Service Scheduling

- Service Scheduling is for service providing companies which specialize in resource and time management
- Service Scheduling will help to reduce resource inefficiencies and deliver prompt, accurate service.
- Benefits of Service Scheduling
  - Scheduling tighter appointments
  - Prevent over scheduling
  - Provide reliable time estimates to clients

#### Service Scheduling

- Concepts used in Service Scheduling:
  - Resources Equipment, facilities or users
  - Resource Groups Groups individual resources together as one resource i.e. if one resource is scheduled they are both scheduled
  - Selection Rules Groups resources into sets which are used to manage the schedule and tracking each service



#### What does the Marketing Module include?

- Access to the following entities (out of the box)
  - Leads
  - Accounts
  - Contacts
  - Marketing Lists
  - Campaigns
  - Products
  - Sales Literature
  - Quick Campaigns



# Campaigns/Quick Campaigns

#### Campaigns/Quick Campaigns

- What is a campaign?
  - Allow tracking of all the various campaign activities
  - Ability to track collateral and content used in a campaign
  - Define the target audience for the campaign
  - Track costs associated with the campaign
  - Report on financials as well as various other factors to determine success of a campaign
- Campaigns vs. Quick Campaigns
  - Quick campaigns are simpler, wizard driven campaigns meant to accomplish a single task (such as an email blast)
  - Campaigns themselves can be this simple but are intended to track the various activities, financials, etc. of a full campaign



#### Marketing Lists

- Two kinds of marketing lists in CRM 2011
  - Static
    - This is the default list type
    - Same as marketing list in CRM 4.0
  - Dynamic
    - List that includes any record that matches defined criteria
      - Criteria set via Advanced View style query
    - Records added to CRM after dynamic list is created will be added to the dynamic list
    - Any dynamic list can be copied to a static list

Application - Summary

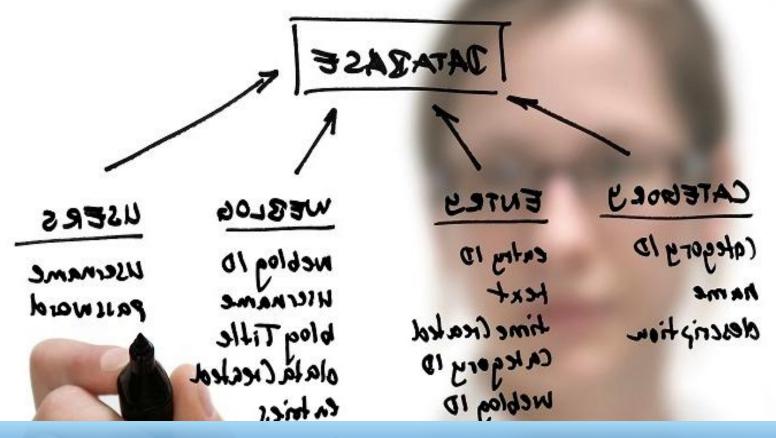
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## Questions?

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