



Microsoft Dynamics CRM 2013

MCRM 2013
Applications

Applications Course: Programme

- ✿ Introduction course PDF
- ✿ Customer Service 80545
- ✿ Sales Management 80546
- ✿ Case Study: CRM Features
- ✿ Exam MB2-700



Applications Course: Overview


Course Overview:

- Overview of to Microsoft Dynamics CRM Application
- Microsoft Dynamics CRM Basics
- What's new in Dynamics CRM 2013
- Records, Data and Processes
- Service Management in CRM
- Managing Service Cases
- Microsoft Dynamics CRM Knowledge Base
- Using Service Scheduling
- Service Scheduling Administration
- Sales Management in CRM
- Sales Order Processing
- Goals and Reporting
- Case Study

3



Introduction to Dynamics CRM Application: Objectives

 Base/Common functionality of Dynamics CRM 2013 not covered by Microsoft courseware

 New features in Dynamics CRM 2013

4



Introduction to Dynamics CRM Application: Modules

- ✿ Dynamics CRM Overview
- ✿ Working with the Dynamics CRM Application
- ✿ Working with Dynamics CRM Records
- ✿ Working with Dynamics CRM Data
- ✿ Working with Dynamics CRM Processes

5



Introduction to Dynamics CRM Application: Module 1

The key objective of this module is to provide a high level overview of Microsoft Dynamics CRM 2013 and its capabilities.

In this module we will cover:

- ✿ CRM Concepts
- ✿ What's New in CRM 2013
- ✿ Navigation
- ✿ What's coming up

6



Introduction to Dynamics CRM Application: Lesson 1.1

Dynamics CRM Functionality

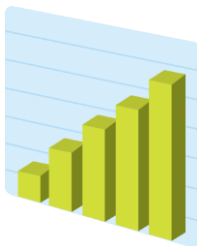
- ✿ Support Sales, Marketing & Service
- ✿ Customisable
- ✿ Marketplace



Introduction to Dynamics CRM Application: Lesson 1.1

Functional Areas

Sales



Marketing



Customer Care



Introduction to Dynamics CRM Application: Lesson 1.1

Sales Functionality

- ✿ Leads
- ✿ Opportunities
- ✿ Communication tracking
- ✿ Products and Pricing
- ✿ Sales processes



Introduction to Dynamics CRM Application: Lesson 1.1

Marketing Functionality

- ✿ Market lists
- ✿ Campaigns
- ✿ Tracking responses
- ✿ Reporting



Introduction to Dynamics CRM Application: Lesson 1.1

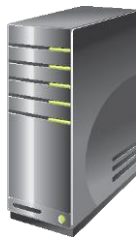
Service Functionality

- ✿ Case recording and resolution
- ✿ Contract Management
- ✿ Service and Resource Management
- ✿ Service Scheduling
- ✿ Knowledge Base



Introduction to Dynamics CRM Application: Lesson 1.1

Deployment Options



On-Premise



Online/Cloud

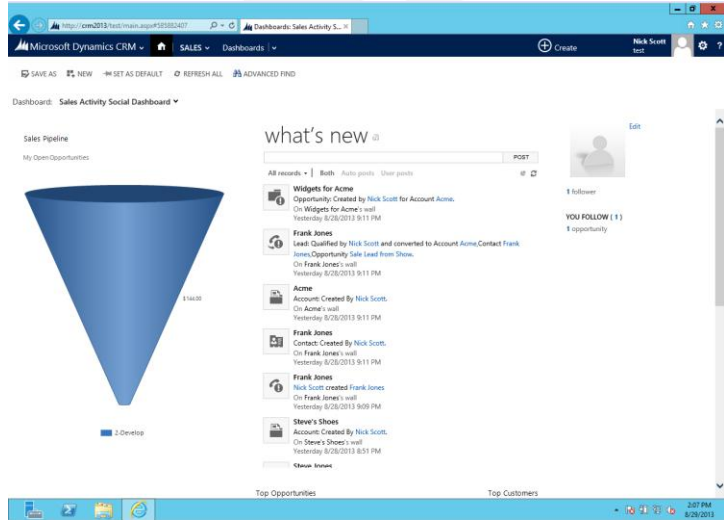


Partner Hosted



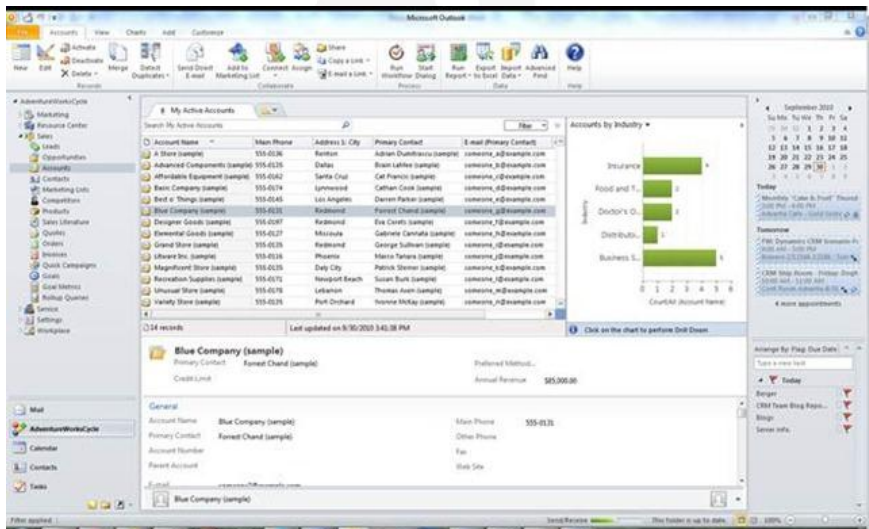
Introduction to Dynamics CRM Application: Lesson 1.1

Web Client



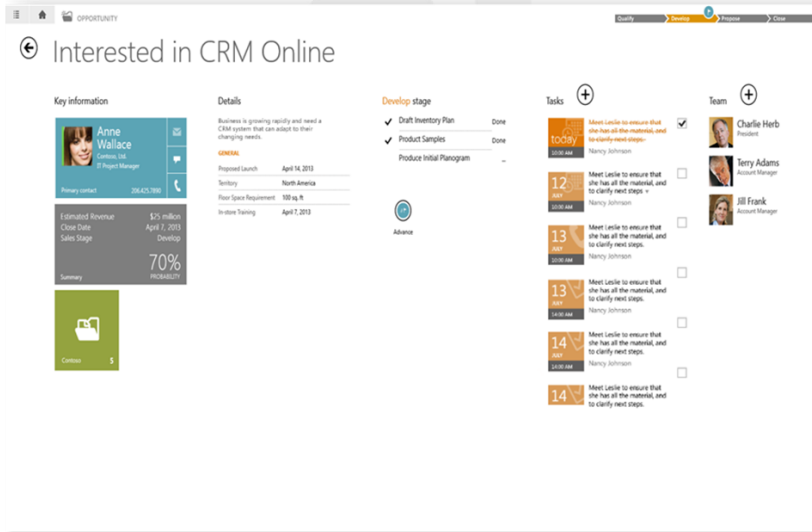
Introduction to Dynamics CRM Application: Lesson 1.1

Outlook Client



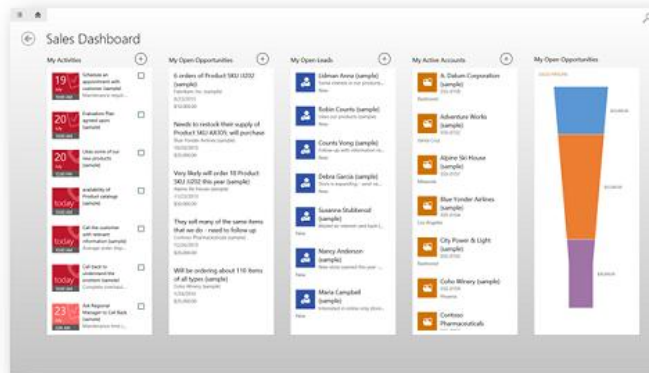
Introduction to Dynamics CRM Application: Lesson 1.1

Mobile Client



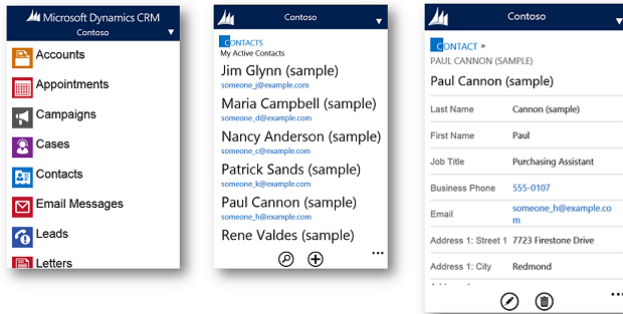
Introduction to Dynamics CRM Application: Lesson 1.1

Mobile Client



Introduction to Dynamics CRM Application: Lesson 1.1

Mobile Client



17

Introduction to Dynamics CRM Application: Lesson 1.1

Security

Authentication



Security Roles

Forms, Field level security

Sharing, Access Teams



18

Introduction to Dynamics CRM Application: Lesson 1.2

What's New in CRM 2013

- ✿ New UI and Navigation
- ✿ Quick Create form
- ✿ Quick View forms
- ✿ Business Rules
- ✿ Business Process Flows
- ✿ Real time / Synchronous Workflows



Introduction to Dynamics CRM Application: Lesson 1.2

What's New in CRM 2013

- ✿ Auto Save
- ✿ Role-Based Security Teams (owner Teams) and Access Teams
- ✿ Native Mobile Apps
- ✿ Database encryption
- ✿ Composite fields
- ✿ Inline editing



Introduction to Dynamics CRM Application: Lesson 1.2

What's New in CRM 2013

- ✿ Yammer Integration
- ✿ Skype & Lync Integration (Phone Number field)
- ✿ Bing Maps
- ✿ Server Side Sync
- ✿ FetchXML Outer Join
- ✿ Image field

21



Introduction to Dynamics CRM Application: Lesson 1.2

What's Gone in CRM 2013

- ✿ Get started pane
- ✿ Popups
- ✿ Duplicate Detection

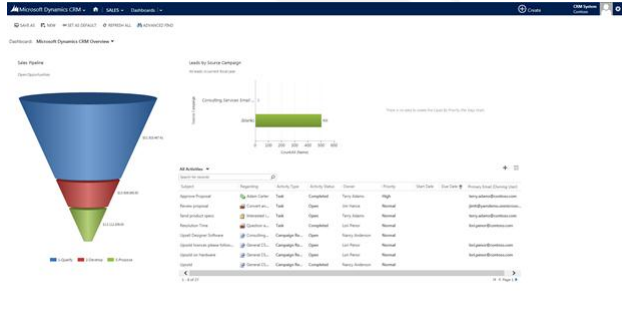
22



Introduction to Dynamics CRM Application: Lesson 1.3

Navigation Changes from 2011

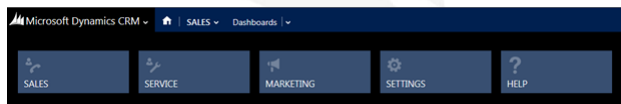
🌀 Left hand navigation - gone



Introduction to Dynamics CRM Application: Lesson 1.3

Navigation Changes from 2011

🌀 Ribbon -> Command bar



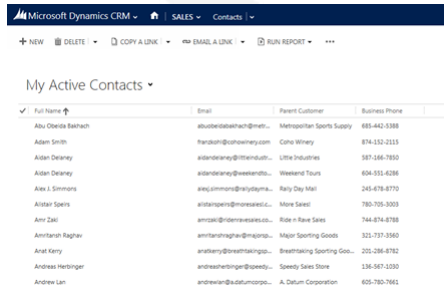
Introduction to Dynamics CRM Application: Lesson 1.3

Navigation

Record Types



Find records

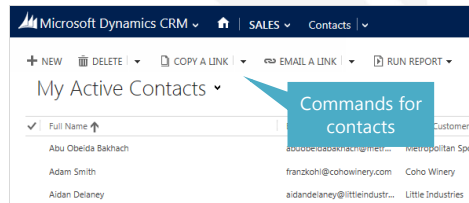


25

Introduction to Dynamics CRM Application: Lesson 1.3

Navigation

Action Bar

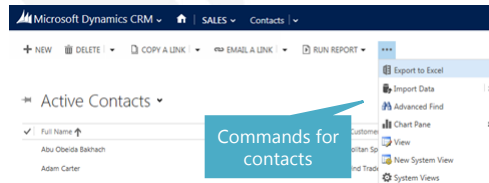


26

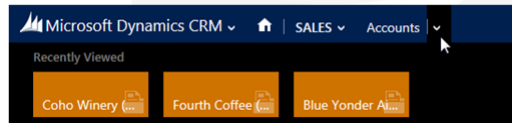
Introduction to Dynamics CRM Application: Lesson 1.3

Navigation

More commands



Recently viewed

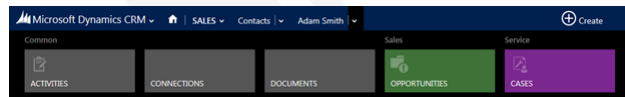


27

Introduction to Dynamics CRM Application: Lesson 1.3

Navigation

Related information



28

Introduction to Dynamics CRM Application: Lesson 1.3

Navigation

- ✿ Edit data inline
- ✿ Quick create
- ✿ Add notes
- ✿ Related records
- ✿ Opportunity products

29



Introduction to Dynamics CRM Application: Lesson 1.4

New functionality coming up

- ✿ Marketing Pilot
- ✿ Parature
- ✿ Social Listening
- ✿ Unified Service Desktop (CCA)
- ✿ New Enterprise License

30



Introduction to Dynamics CRM Application: Lesson 1 Labs

Lab 1A: Quick Create

- Find all the places you can use Quick Create from within the User Interface

Exercise 1B: Navigate





- Navigate to Contacts
- Changes to All Contacts view
- Open Contact record
- Close Contact record
- Browse to Applications_Exercise_Navigate folder and click on practice.html

31



Introduction to Dynamics CRM Application: Module 2

The key objectives of this module are to:

-  Understand customer records
-  Use notes and attachments
-  Use Connections
-  Use activity records to track customer interactions

32



Working with Dynamics CRM Application

Customer Records

- Accounts
- Contact

Accounts and Sub-Accounts

Contacts and Parent Account

Primary Contact

Addresses

33



Working with Dynamics CRM Application

Notes and Attachments

Connections

Activities

34



Introduction to Dynamics CRM Application: Module 3

The key objectives of this module are to:

- ✿ The key objectives of this module are to:
- ✿ Create records
- ✿ Edit records
- ✿ Understand ownership of records
- ✿ Understand sharing of records

35



Introduction to Dynamics CRM Application: Lesson 3.1

Working with Dynamics CRM Records

- ✿ Creating Records
- ✿ Editing Records
- ✿ Ownership
- ✿ Sharing

36



Introduction to Dynamics CRM Application: Lesson 3 Labs

Lab 3A: Create and Link Records

- Create an Account
- Create a Contact and make its parent the Account
- Make the Contact the Primary Contact on the Account
- Create a Connection between the Account and the Contact

Exercise 3B: Create a Activity

- Browse to Applications_Exercise_CreateActivity folder and click on practice.html

Exercise 3C: Create an Opportunity

- Browse to Applications_Exercise_CreateOpportunity folder and click on practice.html

Exercise 3D: Process a Case

- Browse to Applications_Exercise_ProcessCase folder and click on practice.html ³⁷



Introduction to Dynamics CRM Application: Module 4

The key objectives of this module are to:

 Quick Find

 Views and Advanced Find

 Data Import and Export



38

Introduction to Dynamics CRM Application: Lesson 4.1

Working with Dynamics CRM Data

- ✿ Quick Find
- ✿ Views
- ✿ Advanced Find
- ✿ Data Export
- ✿ Data Import



Introduction to Dynamics CRM Application: Lesson 4 Labs

✿ Exercise 4A: Views

- Browse to Applications_Exercise_View folder and click on practice.html

✿ Exercise 4B: Saved Views

- Browse to Applications_Exercise_SaveView folder and click on practice.html



Introduction to Dynamics CRM Application: Module 5

The key objectives of this module are to:

- ✿ Processes
- ✿ Workflows
- ✿ Dialogs
- ✿ Business Process Flows
- ✿ Actions

41



Introduction to Dynamics CRM Application: Lesson 5.1

Working with Dynamics CRM Data

- ✿ Workflows
- ✿ Dialogs
- ✿ Business Process Flows
- ✿ Actions

42



Lab 5A: Workflow

- Create a workflow for the Contact entity that creates a Task if there is no Parent Customer when a Contact is created

Lab 5B: Business Process Flow

- Create a business process flow for the case entity with three stages and required fields:
 - Log
 - Investigate
 - Resolve

