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Course Title: Microsoft Dynamics CRM – Core Foundation

Objectives: To provide delegates with the confidence, knowledge and practical experience to be able to use Microsoft Dynamics CRM core features.

Delegates will learn how to use Microsoft Dynamics CRM key features in working with organisations and contacts, such as finding, creating and modifying. In addition delegates will also learn to effectively manage activities related to client data. Delegates will also learn what options are available to report on CRM data and how to use these.

Who should attend: This course is aimed at delegates who have some experience of using CRM and would like to better understand the tool and the features available to them. It is assumed that delegates are accessing Microsoft Dynamics CRM through the Microsoft Outlook CRM client.

Duration: Half Day – One Day (depending on depth of coverage in each area)

Course Content

- **Review of Core Fundamentals in CRM**
 - Accessing CRM – logging on
 - The 360 degree customer view
 - User preferences
- **Search for Contacts & Organisations**
 - The alpha bar & search bar
 - Using wildcards
 - Quick Advanced Find
 - Personal views – viewing more records onscreen
- **Key entity records**
 - The Employing Organisation records
 - Related records
 - The Contact record
 - Related records
- **Creating and modifying records**
 - Creating a new Organisation
 - Creating a new Contact
 - Mandatory field options
 - Saving options
 - Activate vs deactivate vs delete
 - Adding notes and attachments
- **Activities – Recording Engagements in Outlook or in CRM only**
 - Where to find activities
 - Where to create activities from
 - Creating email activities
 - Recording events of an engagement
 - Creating follow up appointments
 - Tracking activity in CRM
 - Set Regarding option
 - Checking History
 - Working online vs offline
- Q & A session