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Course Title: Microsoft Dynamics CRM – Business Support Co-ordinator

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 clients 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: One Day

Course Content

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| <ul style="list-style-type: none">• Core Aspects of CRM<ul style="list-style-type: none">• Accessing CRM• The 360 degree customer view• User preferences• Finding Records<ul style="list-style-type: none">• The alpha bar• The search bar• Advanced Find• Personal views• Key Entity Records<ul style="list-style-type: none">• The Employing Organisation record• Related records• The Contact record• Related records• Relationships• Creating and Modifying Records<ul style="list-style-type: none">• Creating a new record• Mandatory fields• Save options• Activate vs deactivate vs delete• Adding notes and attachments• Quick Campaigns<ul style="list-style-type: none">• An overview | <ul style="list-style-type: none">• Activities<ul style="list-style-type: none">• Where to find activities• Where to create activities from• Creating email activities• Tracking emails• Creating appointments• The Outlook Client<ul style="list-style-type: none">• Working online v offline• Synchronising data to Outlook• Tracking activities in CRM option• Linking Records - Set Regarding option• Creating Reports<ul style="list-style-type: none">• The Report Wizard• Export to static Excel• Export to dynamic Excel• Data Management<ul style="list-style-type: none">• Existing rules• Data duplication rules• Merging data records• Data imports and exports• Ownership and sharing |
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