POWER OBJECTS

DETAILED BOOT CAMP AGENDA

2 **Intro to Dynamics CRM (Day 1 and 2): Sales, Marketing, Service**

Overview

Navigation

Working with the Application
Working with Records
Microsoft Dynamics CRM for Microsoft Office Outlook
Searching and Reporting Overview

3 **Sales**

Sales Management: Introduction
Sales Management: Working with the Product Catalog
Sales Management: Sales Order Processing
Sales Management: Analysis, Reporting and Goals

4 **Marketing**

Service Management: Introduction
Service Management: Working with Cases
Service Management: Using the Knowledge Base
Service Management: Working with Teams and Queues

5 **Advanced Dynamics CRM (Day 3): Search, Analyze and Present**

Advanced Find   Reports
Export to Excel   Collaboration Tools
Visualizations   Data Mangement

6 **Administrator (Day 4 and 5): Processes, Administration and Customization**

Administration

Business Units and Security Roles
Users and Teams
System Settings

Customization

Overview   Portable Business Logic
Solutions   Field Level Security
Fields, Entities, Forms, and Views   Auditing

7 **Processes**

Workflows   Process Flows
Dialogs   Managing Processes

⚲ **Service**   💬 **Support**   🎓 **Education**   ✦ **Add-Ons**

Intro to Dynamics CRM (Day 1 and 2): Sales, Marketing, Service

Overview

Sales Features / Sales Process Overview

Prospecting and qualifying leads
Managing opportunities and keeing track of the stages of deal closure
Managing and tracking communications between salespeople and customers
Maintaining a database of product information
Using sales processes to guide sales representatives through the sales life-cycle

Marketing Features / Marketing Process Overview

Marketing activity in Microsoft Dynamics CRM
Segmenting lists of customers and prospects to market
Tracking lead sources and the effectiveness of marketing efforts
Executing email, phone call, and mail campaigns to people in CRM

Service Features / Service Examples

Recording complaints, problems, questions, or other inquiries (case records)
Recording entitlement to service (contract records)
Defining services provided and the resources needed for the services
Scheduling appointments using the scheduling engine
Building a store of intelligence using the Knowledge Base

Microsoft Dynamics CRM Access Overview
Application Navigation Tips and Tricks
Microsoft Dynamics CRM Help Resources

Navigation

Working with the Application

Personalize Microsoft Dynamics CRM
Customer Records
Relationship Concepts
Address Concepts
Notes and Attachments

Connections
Activity Basics
Search Overview
Personal Options

Working with Records

Views / Grids / Hierarchical Visualizations
Record Ownership Concepts
Assigning
Sharing Records
Bulk Actions

Microsoft Dynamics CRM for Microsoft Office Outlook

Integration with Outlook / Navigation

Tracking Outlook Items

    Records Available to Track

    How-to Track

    Features of Tracking

Synchronizing Records from CRM to Outlook

    Concepts of Synchronization

    Synchronization Filters

Working with Off-line clients

Searching and Reporting Overview

Quick Find

Advanced Find

Export to Excel

Default Reports

Report Wizard - Create Simple Reports

Visualizations

    Charts

    Dashboards (Display charts and views)

Sales

Sales Management: Introduction

Overview of Sales Process

Examples of Sales Cycles / Processes

Business Rules and Process Automation

Core Sales Records

Other Records in the Sales Process

Working with Leads

Opportunity Management

Sales Management: Working with the Product Catalog

Benefits

Product Catalog Uses

Setting up the Product Catalog

Maintaining Product Catalog

Sales Management: Sales Order Processing

Dynamics CRM Sales Order Processing

Opportunities, Quotes and the Sales Process

Sales Order Process flow

Working with Quotes, Orders and Invoices

Sales Management: Analysis, Reporting, and Goals

Data Grids, Views, and Charts

Default Sales Reports

Create Custom Reports with Report Wizard

Export to Excel

Goal Management

Visualizations and Sales Module: Charts and Dashboards

Marketing

Marketing Automation: Introduction

Closed Loop Marketing
  Definition / Importance
  How it's used in Dynamics CRM
  Benefits of Closed Loop Marketing
Creating and Using Marketing Lists
Campaigns
  Planning
  Creating
Quick Campaigns
Creating and Using Campaign Templates

Implementing and Managing Marketing Campaigns

Campaign Activities and Marketing Lists
Marketing Campaign Execution
  Associate Sales Literature with a Campaign
  Associate Target Products with a Campaign
  Adding a Special Offer Price List
Working with Campaign Responses

Service

Service Management: Introduction

Overview: Cases
Subject Tree
Overview: Knowledge Base
Typical Service Case Management Process
Overview: Queues for Service Management
Overview: Entitlements and SLAs

Service Management: Working with Cases

Understanding Case Management
  Viewing Cases
  Creating Cases
  Working with Cases
Characteristic Service Management Process
Case Assignment and Routing
Entitlements and SLAs
  Creating Entitlements
  Creating SLAs
  Using Entitlements and SLAs with Cases

Service Management: Using Knowledge Base

Knowledge Base Concepts
Knowledge Base Article Templates
Creating, Approving and Publishing Articles
Using and Searching the Knowledge Base
Cases and Knowledge Base Articles
Managing Knowledge Base Articles

Service Management: Working with Teams and Queues

Introduction to Teams
Introduction to Queues
Common Uses of Queues
Working with Queues and Queue Items
Queue Item Views

Advanced Dynamics CRM (Day 3): Search, Analyze, and Present

Advanced Find

Overview of Capabilities
Creating Queries
Sharing Views

Export to Excel

Static and Dynamic Sheets
Pivot Tables
Reimporting

Visualizations

Charts
Dashboards

Reports

Default
Report Wizard

Collaboration Tools

Mail Merge
Email Templates
Sharing

Data Managment

Import Wizard
Excel Reimport
Duplication Detection

Administrator (Day 4 and 5): Processes, Administration, and Customization

Administration

Business Units and Security Roles

Defined
Managing
Features / Use

Users and Teams

User Management
User Creation and Maintenance
Team Configuration and Management
Position and Manager Security

System Settings

Customization

Overview

Methodology
Types of Customization

Solutions

Defined / Concepts
Purpose
Exporting and Importing Solutions
Managed vs. Unmanaged Solutions

Fields, Entities, Forms, and Views

Fields
  Types
  Concepts
  Creating
Entities
  Concepts
  Modifying
  Creating
Relationships and Mappings
  Types
  Creating
  Mapping
Customizing Forms, Views, and Charts

Portable Business Logic

Defined

Creating Business Rules

Field Level Security

Defined / Scope

Configuring

Auditing

Best Practices

Configuring

Managing

Processes

Workflows

Implementing and Creating Workflow Processes

Creating a Workflow - Overview

Starting Workflows

How a Simple Workflow is Created

How to Create a Workflow Using a Wait Condition

Configuring Multistage Workflows

Child Workflows

Real Time Workflows

Testing Workflows

Dialogs

Defined

Dialog Concepts / Dialog Demonstrations

Creating Dialogs

Process Flows

Defined

Out-of-the-Box Process Flows

Creating & Modifying Process Flows

How to Work with Process Flows Branching

Managing Processes

How and Where Processes can be Monitored

How to Import and Export Processes

How Security Applies to Processes

The Impact of Importing Data on Server Performance

Monitoring Processes

Process Security