1 Days

Service Scheduling in Microsoft Dynamics CRM 2011

This course discusses the scheduling process, scheduling engine, and scheduling service activities in detail since they are key entry points in the scheduling process. It also discusses how to use service scheduling in situations that have complex scheduling requirements.

Course Details

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Course Outline

Module 1: Introduction This module discusses the scheduling process, scheduling engine, and scheduling service activities in detail since they are key entry points in the scheduling process. Lessons Service Scheduling Overview Service Scheduling Scenarios Service Scheduling Process Working with Service Activities and the Service Calendar Closing, Canceling, or Rescheduling a Service Activity Using Charts and Reports to Analyze Service Activities Lab : Create a Service Activity with a Selection Rule After completing this module, students will be able to: Discuss key service scheduling concepts. Compare service scheduling business scenarios. Understand the service scheduling process flow. Set up a Work Schedule for a User, Facility or Equipment. Create service activities and navigate and book service activities in the Service Calendar. Close, cancel or reschedule service activities Analyze service activity information using charts.

Module 2: Advanced Topics This module presents how to use service scheduling in situations that have complex scheduling requirements. Lessons Understanding the Service Activity Scheduling Engine Resources, Services and Selection Rules Incorporating Customer Preferences Resource and Service Capacity Requirements Understanding Sites and Same-Site Requirements Lab : Schedule a Service with a Same-Site Requirement After completing this module, students will be able to: Identify the role and importance of the Service Activity Scheduling Engine. Explain how service activity records synchronize with Microsoft Office Outlook in Microsoft Dynamics CRM. Create and modify Selection Rules for the resources required to perform a service activity. Incorporate customer preferences when scheduling service activities. Configure resources and build selection rules to perform capacity scheduling. Describe the importance of sites, how to associate resources with a site, and how to impose same-site restrictions on a resource selection rule.

Who Should Attend

This course is designed for new partners and customers of Microsoft Dynamics CRM that want to learn about the available service scheduling features in the Microsoft Dynamics CRM product.

Pre Requisite

Before attending this course, students must have: General working knowledge of customer relationship management General understanding of business processes General working knowledge of Microsoft Windows.

Exams

Microsoft Certified Professional (MCP) []

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