



CRM TRAINING

AGENDA

GOALS

Improve customer service
Visibility into customer requests (types and quantity)

ACCESSING CRM

Internet browser (<http://crm>)
Outlook client

GENERAL CRM CONCEPTS

Accounts	Vehicles
Contacts	Queues
Cases	My Workplace
Centers	

CASE CREATION

Incoming emails into cases
Each CSS email address has separate queue
Each department has a queue

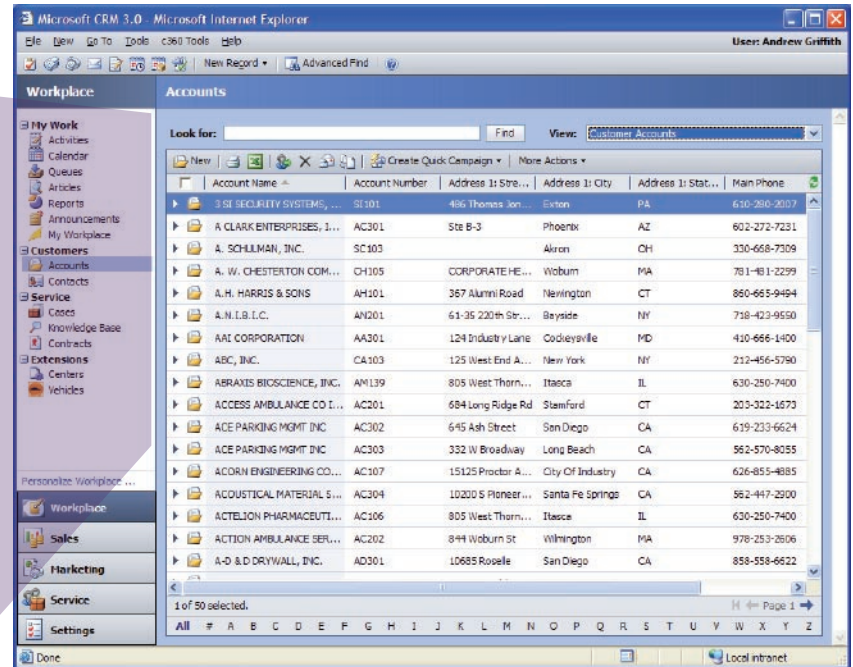
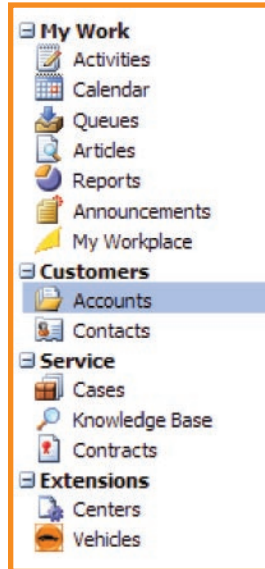
REVIEW AND UPDATE CASE

Original email	Update subject
View	Case assignment
Reply	Accept case
Email tracking	Assign to a department queue
Account	Working the case
Emkay unassigned cases	Updating notes
Accounts matched by email address	Resolving cases
	Assigning cases

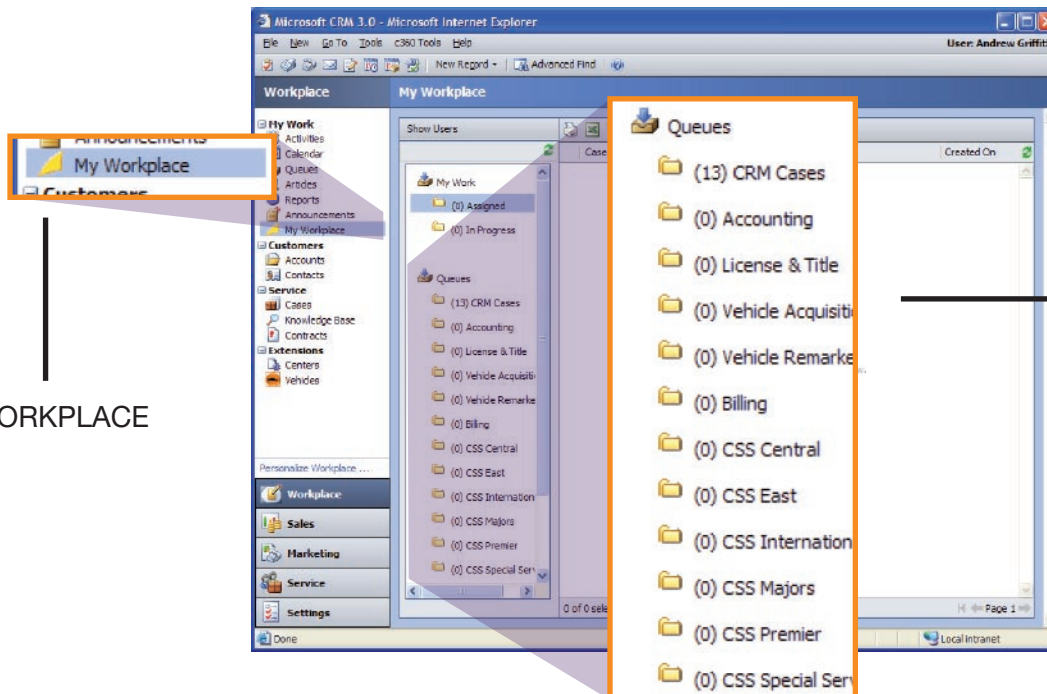
VIEWING CASES**QUESTIONS & ANSWERS**

WORKPLACE

ACCOUNTS VEHICLES
CONTACTS QUEUES
CASES MY WORKPLACE
CENTERS



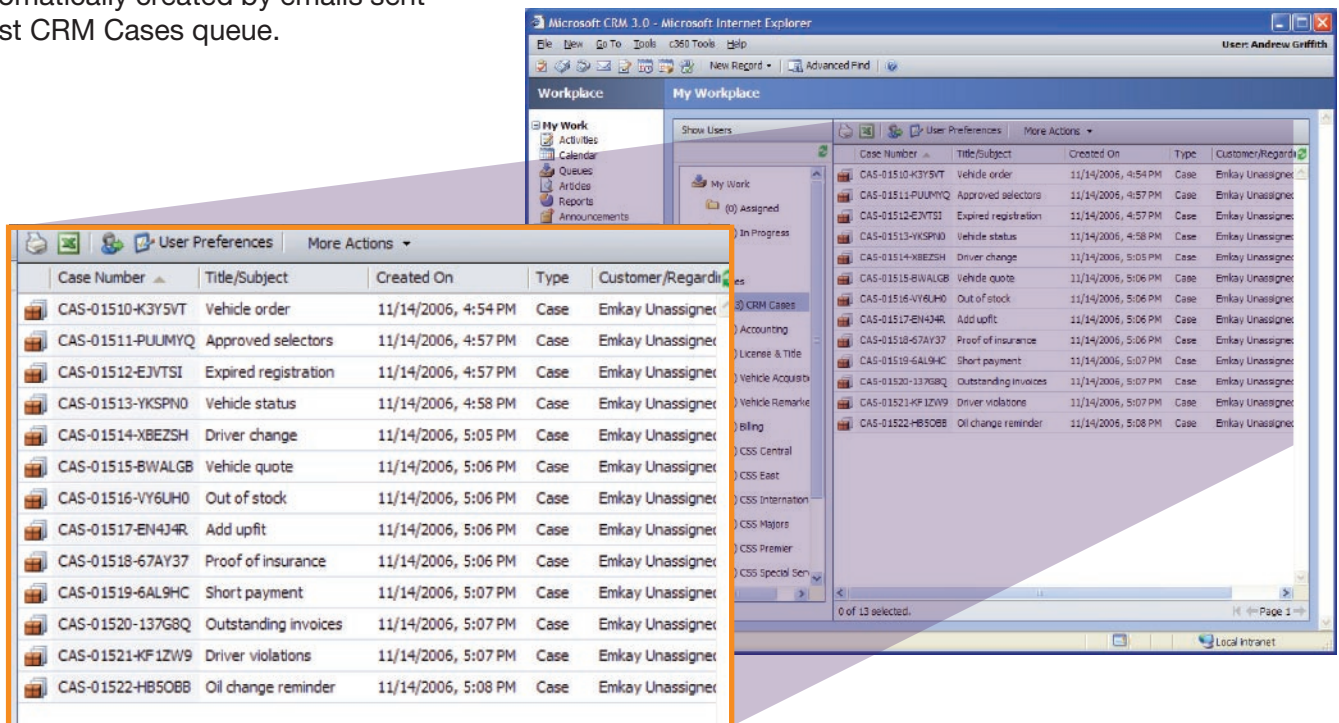
MY WORKPLACE



QUEUES
MY WORK
CSS QUEUES
QUEUES

CASES AUTOMATICALLY CREATED BY EMAILS

Cases automatically created by emails sent into the test CRM Cases queue.

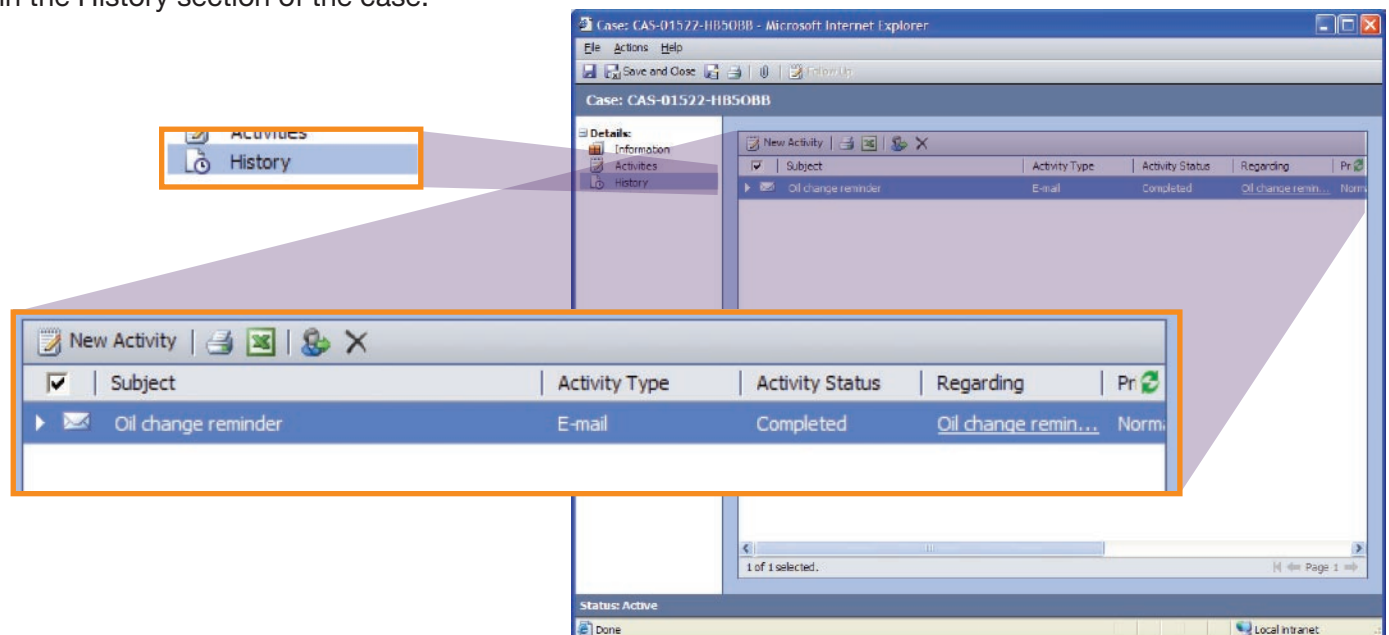


The screenshot shows the Microsoft CRM 3.0 interface in Microsoft Internet Explorer. The 'My Workplace' view displays a list of cases. A callout box highlights a specific case with the following details:

Case Number	Title/Subject	Created On	Type	Customer/Regarding
CAS-01510-K3Y5VT	Vehicle order	11/14/2006, 4:54 PM	Case	Emkay Unassigned
CAS-01511-PUUMYQ	Approved selectors	11/14/2006, 4:57 PM	Case	Emkay Unassigned
CAS-01512-EJVTSI	Expired registration	11/14/2006, 4:57 PM	Case	Emkay Unassigned
CAS-01513-YKSPN0	Vehicle status	11/14/2006, 4:58 PM	Case	Emkay Unassigned
CAS-01514-XBEZSH	Driver change	11/14/2006, 5:05 PM	Case	Emkay Unassigned
CAS-01515-BWALGB	Vehicle quote	11/14/2006, 5:06 PM	Case	Emkay Unassigned
CAS-01516-VY6UHO	Out of stock	11/14/2006, 5:06 PM	Case	Emkay Unassigned
CAS-01517-EN434R	Add upfit	11/14/2006, 5:06 PM	Case	Emkay Unassigned
CAS-01518-67AY37	Proof of insurance	11/14/2006, 5:06 PM	Case	Emkay Unassigned
CAS-01519-6AL9HC	Short payment	11/14/2006, 5:07 PM	Case	Emkay Unassigned
CAS-01520-137G8Q	Outstanding invoices	11/14/2006, 5:07 PM	Case	Emkay Unassigned
CAS-01521-KF1ZW9	Driver violations	11/14/2006, 5:07 PM	Case	Emkay Unassigned
CAS-01522-HB5OBB	Oil change reminder	11/14/2006, 5:08 PM	Case	Emkay Unassigned

ORIGINAL EMAIL THAT GENERATED THE CASE

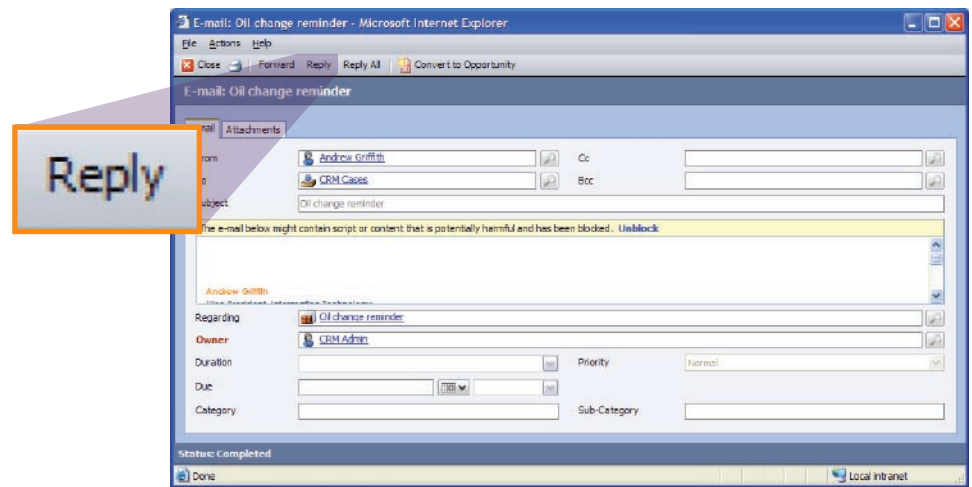
The email that generated the case can be found in the History section of the case.



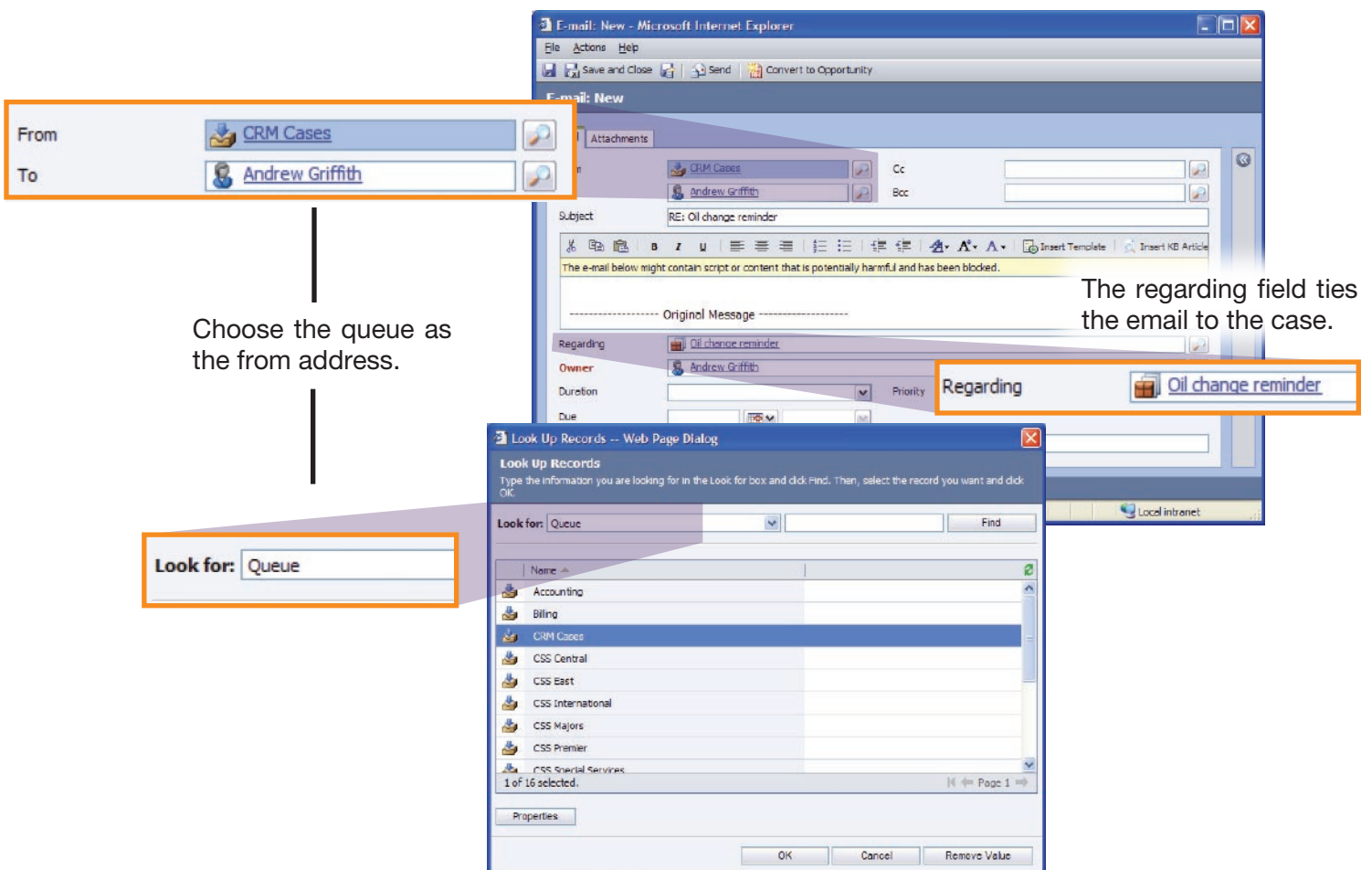
The screenshot shows the Microsoft CRM 3.0 interface in Microsoft Internet Explorer, displaying the details of a specific case (CAS-01522-HB5OBB). The 'History' section is highlighted, showing a list of activities. A callout box highlights the original email activity with the following details:

Subject	Activity Type	Activity Status	Regarding	Priority
Oil change reminder	E-mail	Completed	Oil change remin...	Normal

ORIGINAL EMAIL THAT GENERATED THE CASE



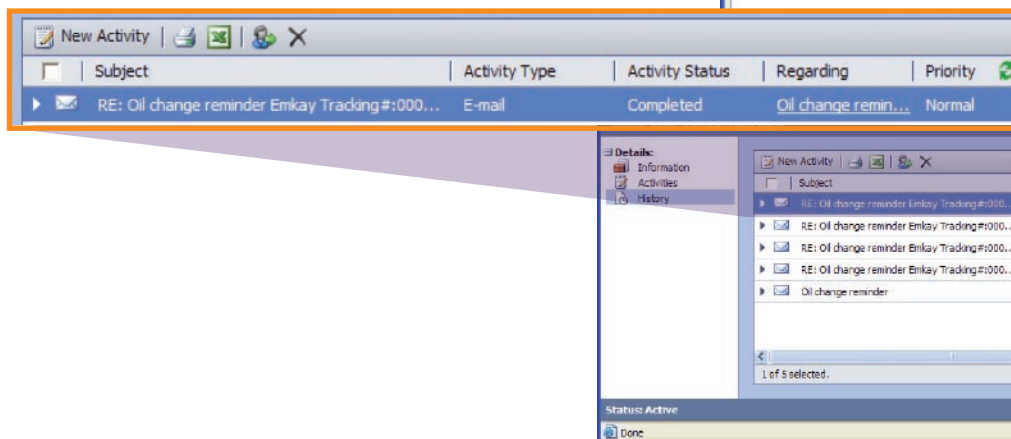
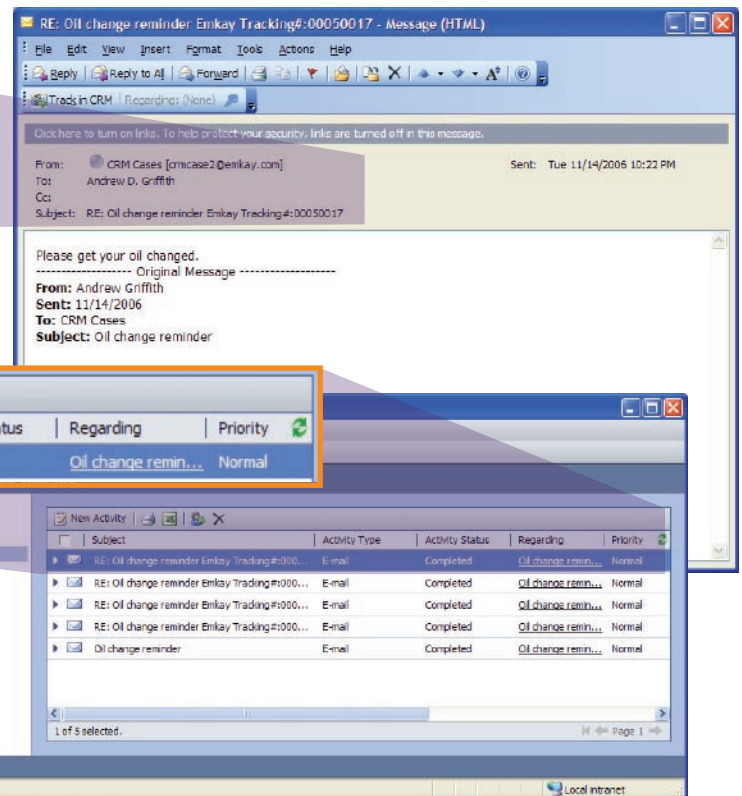
REPLY TO ORIGINAL EMAIL



EMAIL REPLY FROM CRM

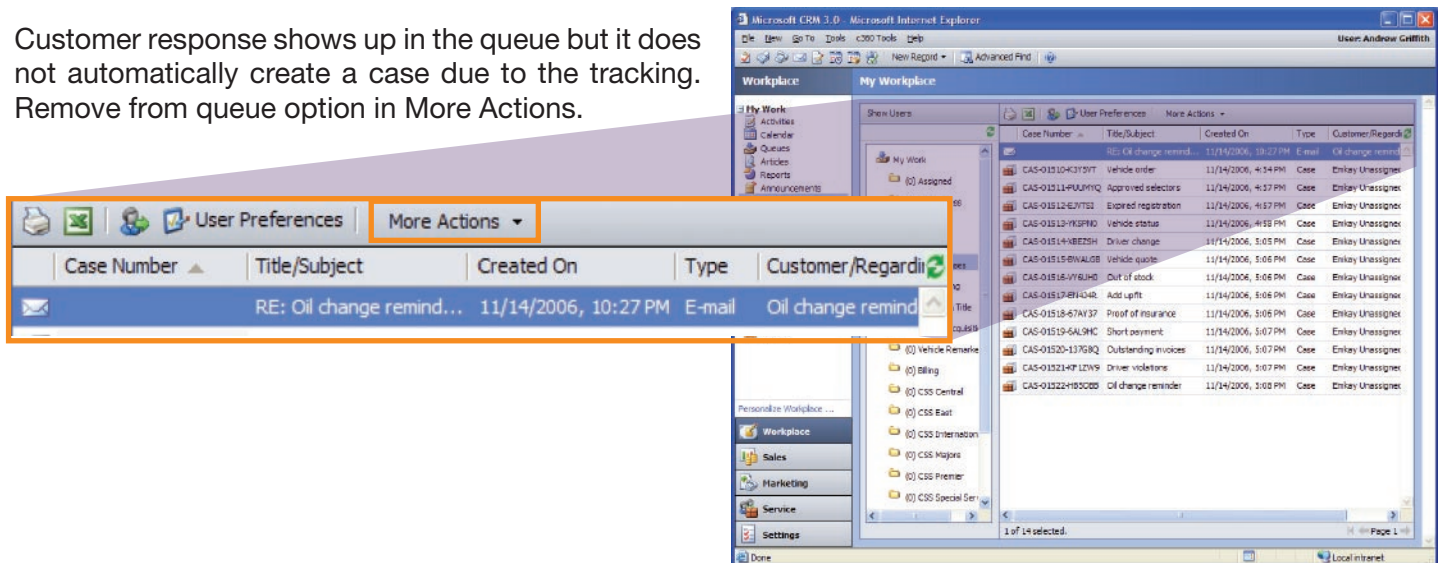
From: CRM Cases [crmcase2@emkay.com]
To: Andrew D. Griffith
Cc:
Subject: RE: Oil change reminder Emkay Tracking#:00050017

CRM tracking in the subject line automatically routes emails into the history area of the case.



CUSTOMER RESPONSE IN THE QUEUE

Customer response shows up in the queue but it does not automatically create a case due to the tracking. Remove from queue option in More Actions.



UPDATE CASE

Overview

Title: Oil change reminder

Customer: Emkay Unassigned Cases

Center: [Dropdown]

Case Origin: E-mail

Vehicle: [Dropdown]

CSS Team: Majors

Subject: [Dropdown]

Case Type: [Dropdown]

Satisfaction: [Dropdown]

Update case information fields.

Actions | **Help**

- Add Activity
- Add a Note
- Attach a File
- Delete Case
- Resolve Case
- Cancel Case
- Assign...**
- Sharing...
- Apply Rule...

Assign to another user or queue.

Case: CAS-01522-HB50BB - Microsoft Internet Explorer

Overview

Title: Oil change reminder

Customer: Emkay Unassigned Cases

Center: [Dropdown]

Case Origin: E-mail

Vehicle: [Dropdown]

CSS Team: Majors

Subject: [Dropdown]

Case Type: [Dropdown]

Satisfaction: [Dropdown]

Assignment Information

Owner: CRM Admin

Follow Up By: [Dropdown]

Status Reason: In Progress

Priority: [Dropdown]

Contract and Product Information

Contract: [Dropdown]

Contract Line: [Dropdown]

Product: [Dropdown]

Serial Number: [Dropdown]

Form Assistant

Look Up Records

Look for: Account

Find

180 CONNECT

1-800FLOWERS.COM

1ST FARM CREDIT SERVICES

21ST CENTURY GENETICS

21ST CENTURY INDUSTRIES

3 P Delivery

3 SE SECURITY SYSTEMS, INC

7up Bottling Co. of San F

8H LUMBER

A - Z CORPORATION

CASE IS NOW IN THE DEPARTMENT QUEUE

The case has been moved to the department queue.

Microsoft CRM 3.0 - Microsoft Internet Explorer

User: Andrew Griffith

Workplace

My Workplace

Show Users

Case Number

Title/Subject

Created On

CAS-01522-HB50BB

Oil change reminder

11/14/2006, 5:08

(1) Maintenance

Service

Knowledge Base

Contracts

Extensions

Personalize Workplace...

Workplace

Sales

Marketing

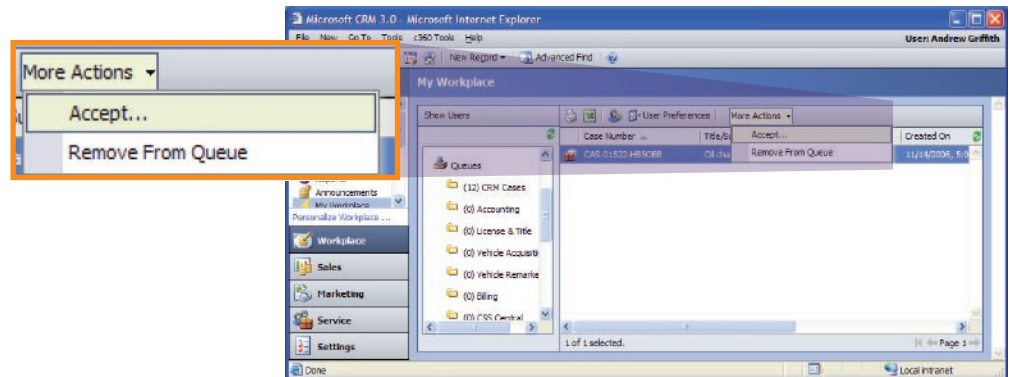
Service

Settings

1 of 1 selected.

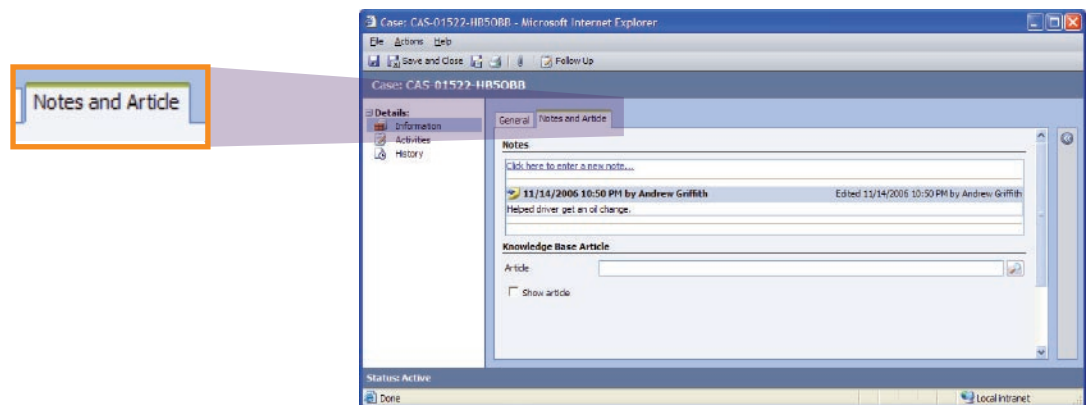
CASE IS NOW IN THE DEPARTMENT QUEUE

Accept the case to move out of queue into My Work.



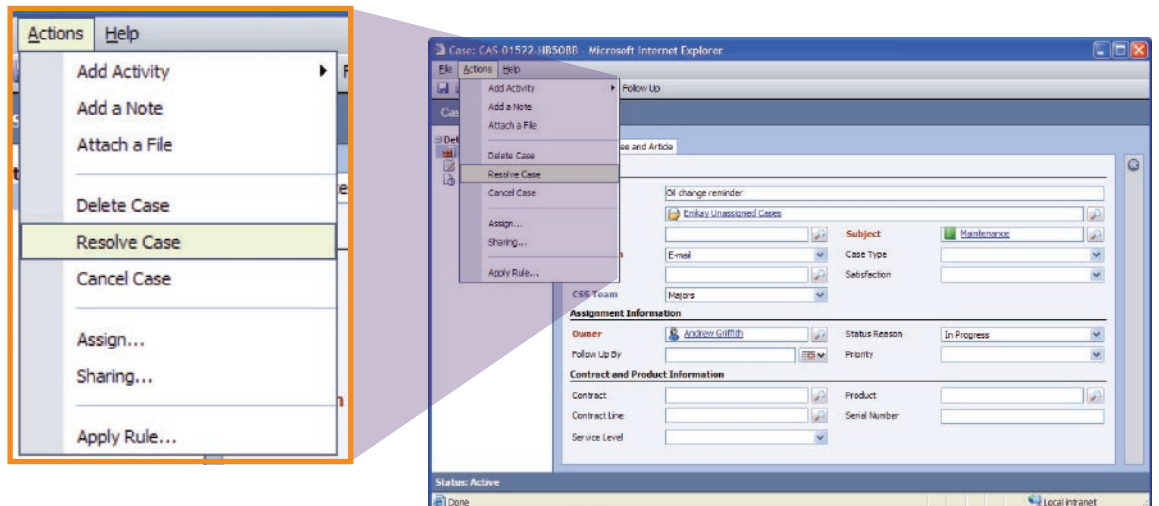
UPDATE CASE NOTES

Add notes to the case.



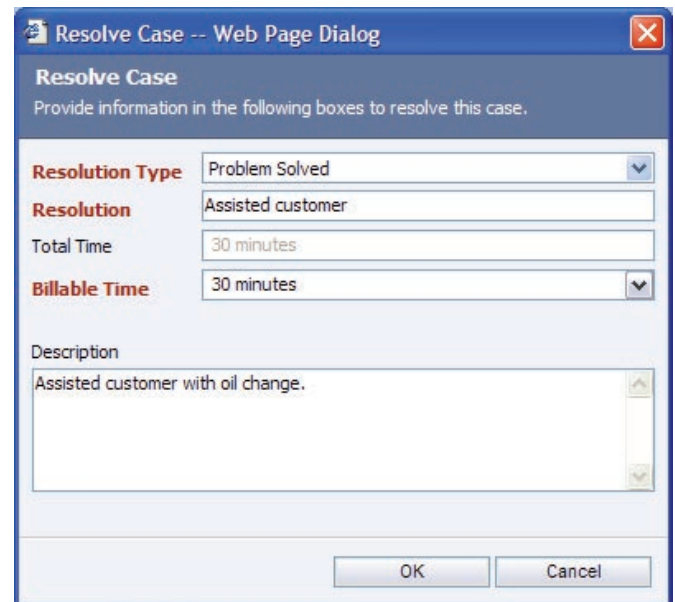
RESOLVE/CLOSE CASE

Choose Resolve Case.



RESOLVE/CLOSE CASE

Enter case resolution information.



Resolve Case
Provide information in the following boxes to resolve this case.

Resolution Type: Problem Solved

Resolution: Assisted customer

Total Time: 30 minutes

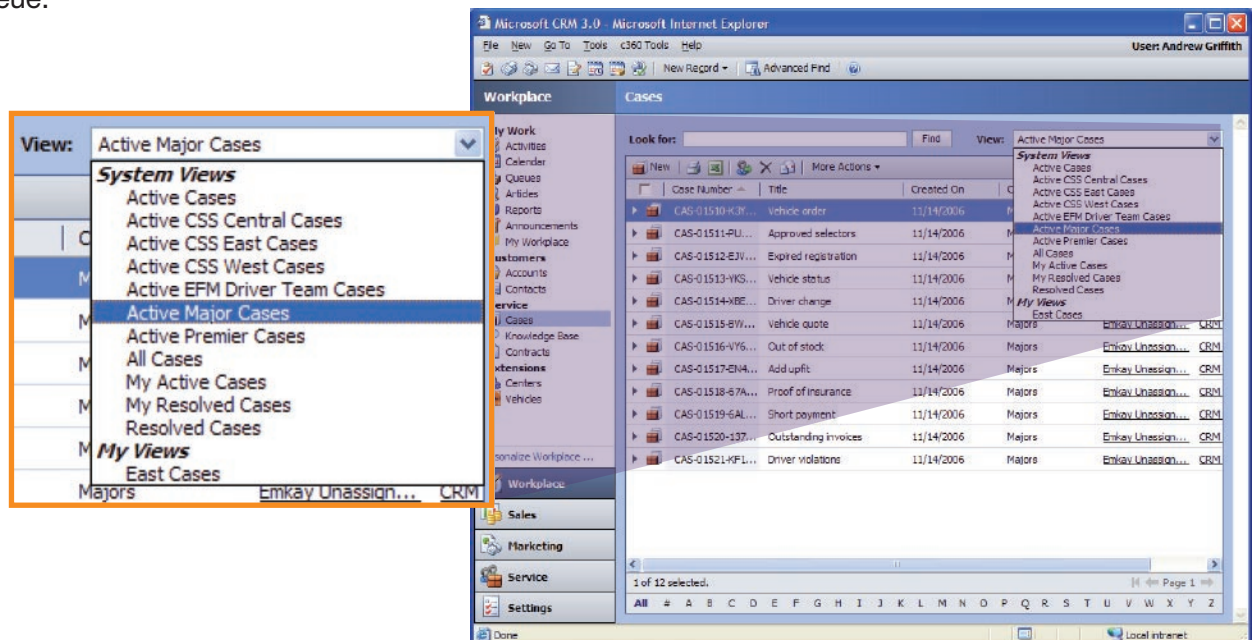
Billable Time: 30 minutes

Description:
Assisted customer with oil change.

OK Cancel

VIEWING CASES

View open cases by team regardless of queue.



The screenshot shows the Microsoft CRM 3.0 interface. On the left, the 'View' dropdown menu is open, displaying a list of views categorized under 'System Views' and 'My Views'. The 'Active Major Cases' view is selected. The main pane shows a list of cases with columns for Case Number, Title, Created On, and Assigned To. The cases are filtered by the selected view.

Case Number	Title	Created On	Assigned To
CAS-01510-K31...	Vehicle order	11/14/2006	Majors
CAS-01511-PLU...	Approved selectors	11/14/2006	Majors
CAS-01512-EJ3...	Expired registration	11/14/2006	Majors
CAS-01513-WKS...	Vehicle status	11/14/2006	Majors
CAS-01514-XBE...	Driver change	11/14/2006	Majors
CAS-01515-BW...	Vehicle quote	11/14/2006	Majors
CAS-01516-VY6...	Out of stock	11/14/2006	Majors
CAS-01517-EN4...	Add upfit	11/14/2006	Majors
CAS-01518-67A...	Proof of insurance	11/14/2006	Majors
CAS-01519-6AL...	Short payment	11/14/2006	Majors
CAS-01520-137...	Outstanding invoices	11/14/2006	Majors
CAS-01521-KFL...	Driver violations	11/14/2006	Majors

NOTES