

# Microsoft Dynamics™ CRM 3.0

## Service Management Datasheet

Microsoft Dynamics™ CRM 3.0 Service Management enables service representatives to track requests, manage support issues from contact through resolution, and deliver the consistent, efficient service that helps ensure customer satisfaction.

**DELIVER SUPERIOR CUSTOMER SERVICE**  
Quickly log, analyze, and resolve service issues with streamlined access to service contracts, frequently asked questions, and historical customer information.

**MANAGE WORK MORE EFFICIENTLY**  
Microsoft CRM delivers CRM as a natural extension of Microsoft Outlook. Manage customer incidents, and all service contacts, from a single business application.

**AUTOMATE SERVICE PROCESSES**  
Assign, manage, and resolve support incidents with automated routing, queuing, and escalation of service requests, along with case management, communications tracking, and auto-response e-mail.

**RESOLVE ISSUES QUICKLY AND ACCURATELY**  
Improve your first-call resolution rates using a searchable, shared knowledge base of articles organized by product and service category.

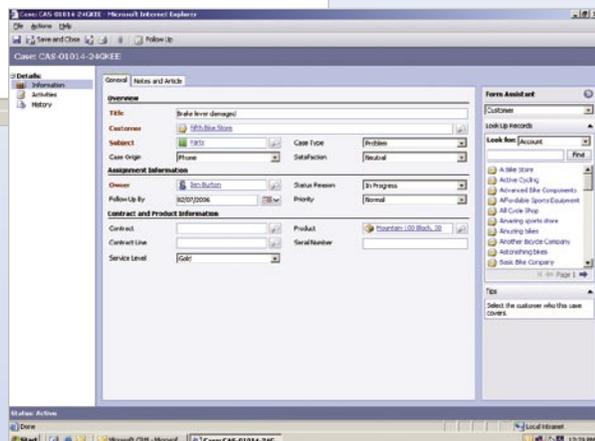
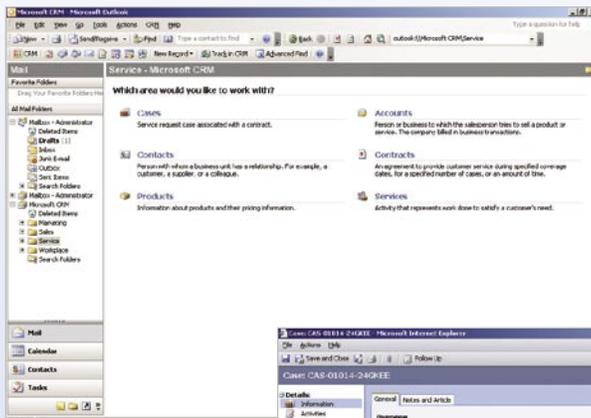
**FIND AND SCHEDULE QUALIFIED SERVICE PROFESSIONALS**  
Quickly search and dispatch skilled service professionals, tools, and resources across service locations to deliver value-added services for your customers.

**HELP INCREASE CUSTOMER SATISFACTION**  
Proactively measure customer satisfaction during each service interaction to help ensure long-term customer loyalty.

### CRM That Works the Way You Do

With the familiar and intuitive user experience of its native Microsoft® Office Outlook® interface, Microsoft CRM fosters user adoption and drives service effectiveness and productivity.

Easily manage all support incidents from initial contact through resolution.



Use customizable forms to track cases, accounts, and contracts.

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### About Microsoft CRM

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**Native Microsoft Outlook experience:** Manage your sales, service, and marketing relationships within a single business application. Automatically synchronize Outlook E-mail, Calendar, Tasks, and Contacts with your Microsoft CRM database.

**Case management:** Create, assign, and manage customer service requests from initial contact through resolution, as well as manage communications and other activities.

**Service requests:** Automatically associate incoming support inquiries with the appropriate case.

**Queuing:** Send cases to a waiting area—the queue—where they can easily be accessed by individuals and teams.

**Routing and workflow:** Route service requests automatically to the appropriate representative for resolution, escalation, or reassignment.

**Searchable knowledge base:** Resolve common support issues quickly by using a searchable knowledge base. Built-in review processes help ensure that published information is complete, correct, and properly tagged.

**Contract management:** Create and maintain service contracts within Microsoft CRM to help ensure accurate billing for support incidents. Each time a support case is resolved, the relevant contract information is updated automatically.

**E-mail management (includes auto-response e-mail):** Maintain accurate customer-related communication records with automated tracking and response for customer e-mail messages.

**Product catalog:** A full-featured product catalog includes support for complex pricing levels, units of measure, discounts, and pricing options.

**Reports:** Identify common support issues, evaluate customer needs, track service processes, and measure service performance.

**Service appointment activities:** Schedule detailed service activity appointments for your service professionals that automatically synchronize to your Microsoft Outlook calendar.

**Services, facilities, and equipment:** Model your entire service delivery offerings and resource groupings into Microsoft CRM to provide consistent service practices throughout your organization.

**Service scheduling engine:** Find qualified and customer-preferred service professionals and schedule service appointments to deliver value-added services for customers.

**Global service calendar:** Manage service appointments and resource allocation across your service sites and locations with a single calendar view of service professionals, tools, resources, and facilities.

Built on the scalable and security-enhanced Microsoft .NET platform and leveraging standard tools and technology, including Microsoft SQL Server™, Microsoft BizTalk® Server, and Microsoft Visual Studio®, Microsoft CRM 3.0 allows you to take advantage of your existing IT investments and in-house expertise to help minimize your total cost of ownership. The product is available on the latest Microsoft operating systems and servers, including Microsoft Windows® Small Business Server 2003 Premium Edition.

Microsoft CRM is available in 22 languages. For more information on Microsoft CRM visit [www.microsoft.com/dynamics/crm](http://www.microsoft.com/dynamics/crm).

A global network of Microsoft CRM partners offers consulting and assistance with product installation, customization, support, and training.

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