

(80546A) –Sales Management in Microsoft Dynamics CRM 2013

OBJECTIVE

This course introduces the capabilities of Sales Management in Microsoft Dynamics CRM 2013 that allow you to track and manage the sales process from potential to close. This course provides insight on sales process information, and introduces the tools available to analyze and report on sales information.

This course guides you through the tools that help make the internal processes simpler and easier so your sales force can focus on what is important—creating a differentiated experience for your customers.

COURSE TOPICS

Module 1: Introduction to Sales Management

- Customer Scenarios
- Basic Record Types

Module 2: Lead Management

- Lead to Opportunity Process Form and Process Ribbon
- Convert Activity Records to Leads
- Qualifying and Disqualifying Leads
- Create, Maintain, and Use Sales Literature
- Create, Maintain, and Use Competitors

Module 3: Working with Opportunity Records

- Create Opportunities and Work with Opportunity Form
- Changing Opportunity Status

Module 4: Working with the Product Catalog

- The Microsoft Dynamics CRM Product Catalog
- Unit Groups
- Adding and Maintaining Products
- Creating, Maintaining and Using Price Lists
- Currency Management
- Creating a Price List

Module 5: Sales Order Processing

- Adding Line Items (Opportunity Products) to Opportunities
- Quote Management
- Working with Orders

- Working with Invoices

Module 6: Metrics and Goals

- Configuring Goal Metrics
- Configuring Fiscal Periods
- Creating and Assigning Goal Records
- Creating and Recalculating Parent and Child Goal Records
- Creating a Rollup Query

Module 7: Sales Analysis

- Running Built-in Reports
- Exporting Sales Information to Excel
- Working with Charts and Dashboards
- Working with System Charts from the Opportunity List
- Working with Dashboards
- Create a New Dashboard in the Workplace
- Sharing DASHBOARDS, Charts and Advanced Find Queries

After completing this course, students will be able to:

- Understand the context of Sales Management and review real-life sales scenarios
- Identify how the various elements of the Microsoft Dynamics CRM 2013 Sales fit together
- Review the basic terminology used throughout the application.
- Review how the basic flow of sales activity in Microsoft Dynamics CRM begins with the entry of leads, and review ways to manage leads in Microsoft Dynamics CRM
- Identify the role of leads, and when they can be used
- Know the Lead to Opportunity process and the roles of these records.
- Work with Sales Literature in Microsoft Dynamics CRM.
- Explore the steps to create and maintain Competitors.
- Identify the features and benefits of the product catalog.
- Create and maintain unit groups for the product catalog.
- Add products to the product catalog, and describe the use of kit products and substitute products.
- Create price lists and configure as appropriate for different customers, marketing campaigns and special offers.
- Set up different price lists for different types of customers and marketing campaigns
- Utilize the tools to available within Microsoft Dynamics CRM to capture important sales information and uncover new business opportunities.

- Identify how Goal Management enables organizations to manage and analyze performance.
- Use the Sales Analysis tools that Microsoft Dynamics CRM provides analyze and report on sales-related information

PREREQUISITES

Before attending this course, students must have:

- General knowledge of Microsoft Windows
- General knowledge of Microsoft Office
- An understanding of Customer Relationship Management solution processes and practices

TRAINING APPROACH

This course includes lectures, course notes, exercises and hands-on practice.

COURSE DURATION

8 Hours (in 1 days)

CERTIFICATION COMPLETION

A certificate of completion is provided for all trainees attending the course