Course Outline

80546-Sales Management in Microsoft Dynamics CRM 2013

Duration: 1 day (6 hours)

Target Audience:

This course is intended for individuals that plan to implement, use, maintain, or support Microsoft Dynamics CRM 2013 in their organization. The training is intended for sales representatives, administrators, office managers, CEOs, and consultants who want to learn the available sales features within Microsoft Dynamics CRM 2013.

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

Topics Covered:

- Module 1: Introduction to Sales Management
  - Customer Scenarios
  - Basic Record Types

  After completing this module, students will be able to:

    - List the business scenarios that might benefit from Microsoft Dynamics CRM Sales Management.
    - Describe the role of the core record types used in Microsoft Dynamics CRM Sales Management.
    - Discuss when and how to use the Competitors and Sales Literature record types.
    - Create and work with new and existing customers.
    - Describe the relationship between customer records and sales records.
- 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
  - Lab : Create and Disqualify a Lead
    - Create a New Lead Record

FORM YOUR FUTURE
formatech.com.lb

LEBANON
Beirut, Sodeco Square
+961 1 611 111
info@formatech.com.lb

U.A.E
Dubai, Knowledge Village
+971 43695391
info@formatech.ae

- Disqualify the Lead Record.

After completing this module, students will be able to:

- Examine the Lead to Opportunity process and the roles of these records.
- Understand how to work with Sales Literature in Microsoft Dynamics CRM.
- Explore the steps to create and maintain Competitors.

➢ Module 3: Working with Opportunity Records

- Create Opportunities and Work with Opportunity Form
- Changing Opportunity Status
  - Lab : Managing Sales Opportunities

After completing this module, students will be able to:

- On a conceptual level, describe Opportunity records.
- Create, work with, close, and reopen Opportunity records.
- Describe the different statuses of an opportunity.
- Use the assign functionality in Microsoft Dynamics to assign opportunities to other users.
- Manage opportunities from system views.

➢ 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
  - Lab : Managing Price List Items
    - Create a Test Opportunity Record, and Add a Price List
  - Lab : Managing the Product Catalog
    - Create Currency
    - Create a Unit Group associated with the Currency
    - Create a Product
    - Create a Price List and Price List Item Tied to the Currency.

After completing this module, students will be able to:

- 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 them as appropriate for different customers, marketing campaigns, and special offers.

- Module 5: Sales Order Processing
  - Adding Line Items (Opportunity Products) to Opportunities
  - Quote Management
  - Working with Orders
  - Working with Invoices
    - Lab : Sales Order Process

  After completing this module, students will be able to:

  - Demonstrate how to add line items to an opportunity.
  - Demonstrate how to generate quotes from an opportunity.
  - Describe how to work with different currencies.
  - Create and edit quotes, orders, and invoices in Microsoft Dynamics CRM.
  - Describe the process of converting a quote to an order.
- 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
    - Lab : Goal Management for Individuals
      - Implement a Goal Metric

  After completing this module, students will be able to:

  - Create and manage sales goals for individuals, teams, and the organization.
  - Configure fiscal periods.
  - Define Parent and Child Goal Records.
  - Work with individual Goal records.
  - Create rollup queries.
- 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
    - Lab : Create a New Personal, Sales Dashboard
      - Create an advanced find query

- Create a chart.
- Create a dashboard, and add the advanced find query and chart to it.
- Share the dashboard.

After completing this module, students will be able to:

- Retrieve important sales information with Lists, Views, and Charts.
- Review potential opportunities, forecast revenue, and analyze sales productivity with Sales Reports.
- Export the results of an Advanced Find or view a Microsoft Office Excel spreadsheet using the Export to Excel feature.
- Create and manage sales goals for individuals, teams, and the organization.
- Create and share personal charts and system charts.
- Work with and create dashboards.
- Describe how to create and manage service activities.