

Course Outline | Dynamics 365 for Sales

2 day(s)

Overview

About this Course:

Introduces the capabilities of Sales Management in Dynamics 365 that allow you to track and manage the sales process from potential to close. Provides insight on sales process information. Introduces the tools available to analyse and report on sales information. Focuses on how an organization can nurture customer satisfaction through automation of business processes with Dynamics 365. Provides insight on managing all related correspondence, documents, contacts and conversations.

Prerequisites:

Before attending this course, students must have:

- General knowledge of Microsoft Windows.
- General knowledge of Microsoft Office.

Audience Profile

This course is intended for individuals who plan to implement, use, maintain, or support Dynamics 365 in their organization. The training is intended for sales representatives, sales managers, administrators, office managers, CEOs, and consultants who want to gain foundational knowledge of the application functionality.

Course Outline

Module 1: Sales Management

- Customer Scenarios
- Core Records
- Working with Sales Literature
- Creating and Maintaining Competitors
- Using Sales Territories

Module 2: Lead Management

- Lead and Opportunity Records
- Lead to Opportunity Process Flow
- Understand Sales Methodology and Lead Management
- Explore Business Process Flow
- Convert, Track and Work with Leads

Module 3: Opportunity Records

- Understanding Opportunity Records
- Create, Work and Close Opportunity Records
- The Status of an Opportunity
- Assigning Opportunities
- Connecting Competitors
- Manage Opportunity from System View
- Adding an Existing Contact to Opportunities from Quick Create

Module 4: The Product Catalog

- Features of the Product Catalog
- Unit Groups
- Products

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- Price list
- Product Bundles
- View Product in Hierarchical Views
- Multiple Currencies
- Add Line Items to Opportunity

Module 5: Sales Order Processing

- The Quote Life Cycle
- Generating Quotes from Opportunities
- Create and Edit Quotes
- Create and Edit Orders
- Create and Edit Invoices
- Converting Quotes to Orders
- Converting Orders to Invoices

Module 6: Sales and Marketing

- Using Marketing Lists
- Using Quick Campaigns
- The Purpose and Elements of Marketing Campaigns
- Using Campaign Templates
- Interactive Generation of HTML IN Emails

Module 7: Goal Management

- Create and Manage Sales Goals for Individuals, Teams and the Organisation
- Configure the financial period
- Defining Parent and Child Goals
- Work With Individuals Goal Records
- Create Roll-up Queries
- Using Pre-Formatted Excel Templates
- Using Word Templates

Module 8: Sales Analysis

- Use Lists, Views and Charts to Obtain Important Information
- Use Sales Reports to Review Potential Opportunities, Forecast Revenue and Analyse Sales Productivity
- Working with Advanced Find
- Using the Export to Excel Feature
- Create and Share Personal and System Charts
- Working with and Creating Dashboards
- Using Pre-Formatted Excel Templates