80546: Sales Management In Microsoft Dynamics CRM 2013

Course Outline

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

2. 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
   - Disqualify the Lead Record.

3. Module 3: Working with Opportunity Records
   - Create Opportunities and Work with Opportunity Form
   - Changing Opportunity Status
   - Lab : Managing Sales Opportunities

4. 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.

5. Module 5: Sales Order Processing

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

6. 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

7. 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.