

# 805705: Sales And Marketing In Microsoft Dynamics CRM 2015/2016

## Course Outline

1. Introduction to Sales Management
  - a. Customer who use Dynamics CRM and scenarios
  - b. Basic Record Types for Sales Management
  - c. An overview of the Sales Process
2. Lead Management
  - . Lead to Opportunity Process Form and Process Ribbon
    - a. Convert Activity Records to Leads
    - b. Qualifying and Disqualifying Leads
    - c. Create, Maintain, and Use Sales Literature
    - d. Create, Maintain, and Use Competitors
3. Working with Opportunity Records
  - . Create Opportunities and Work with Opportunity Form
    - a. Changing Opportunity Status
4. Working with the Product Catalog
  - . The Microsoft Dynamics CRM Product Catalog
    - a. Unit Groups
    - b. Adding and Maintaining Products
    - c. Creating, Maintaining and Using Price Lists
    - d. Currency Management
    - e. Creating a Price List
5. Sales Order Processing
  - . Adding Line Items (Opportunity Products) to Opportunities
    - a. Quote Management
    - b. Working with Orders
    - c. Working with Invoices
6. Marketing
  - . The Dynamics Marketing Module
    - a. Marketing List Management
    - b. Marketing Campaigns and Activities
    - c. Campaign Responses
    - d. Quick Campaigns
    - e. Marketing Goals and Reports

- f. Microsoft Marketing as a Service and Marketing Professional Users
  - g. Dynamics Marketplace
- 7. Metrics and Goals
  - . Configuring Goal Metrics
    - a. Configuring Fiscal Periods
    - b. Creating and Assigning Goal Records
    - c. Creating and Recalculating Parent and Child Goal Records
    - d. Creating a Rollup Query
- 8. Sales and Marketing Analysis
  - . Running Built-in Reports
    - a. Exporting Sales Information to Excel
    - b. Working with Charts and Dashboards
    - c. Working with System Charts from the Opportunity List
    - d. Working with Dashboards
    - e. Create a New Dashboard in the Workplace
    - f. Sharing Dashboards, Charts, and Advanced Find Queries