

80421: Sales and Marketing in Microsoft Dynamics AX 2012

Course Details

Course Outline

1. Module 1: Overview

- Overview
- Customer Relationship Management
- The Customer
- Sales and Marketing and CRM

2. Module 2: Sales and Marketing Setup

- Overview and Scenario
- Sales and Marketing Module Setup
- Transaction Log
- Lab : Set Up CRM Module

3. Module 3: Sales Management

- Overview and Scenario
- The Sales Unit
- Sales Targets
- Management Statistics
- Lab : Creating Sales Units and Targets

4. Module 4: Prospects

- Overview and Scenario
- The Prospect
- Segmentation and Categorization
- Prospect Maintenance
- Lab : Create New Prospects

5. Module 5: Contact Activities and Responsibilities

- Overview and Scenario
- Defining Responsibilities
- Contact Information
- Activities

- Lab : Create Contacts
- Lab : Creating an Activity

6. Module 6: Telemarketing

- Overview and Scenario
- Telemarketing Setup
- Creating Call Lists
- Telemarketing Maintenance
- Lab : Create a Call List

7. Module 7: Campaigns

- Overview and Scenario
- Campaign Maintenance

8. Module 8: Leads and Opportunities

- Overview
- Process Definitions
- Leads
- Opportunities
- Lab : Qualify and Convert a Lead to an Opportunity

9. Module 9: Case Management

- Overview
- Setup
- Working with Cases
- Knowledge Articles
- Case Management Examples

10. Module 10: Common Tools Setup

- Overview and Scenario
- Document Management Setup
- Mailing Lists and Merge Files
- Microsoft Dynamics AX and Outlook Synchronization
- Computer Telephone Integration