Course Content: Sales Management in CRM 2016

Module 1: Microsoft Dynamics CRM Concepts

- Microsoft Dynamics CRM functionality
- Microsoft Dynamics CRM clients
- Microsoft Dynamics CRM records
- Application navigation

Module 2: Working with the Application

- Customer records
- Addresses
- Personal options

Module 3: Introduction to Sales Management

- Customer Scenarios
- Basic Record Types

Module 4: 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

Module 5: Working with Opportunity Records

- Create Opportunities and Work with Opportunity Form
- Changing Opportunity Status
- Lab: Managing Sales Opportunities
- 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 6: 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 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

Module 7: Sales Order Processing

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

Module 8: 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

Module 9: 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.