

## **80546: Sales Management in Microsoft Dynamics CRM 2013**

### **Course Outline**

#### Module 1: Introduction to Sales Management

The Sales module within Microsoft Dynamics CRM provides a flexible framework for organizations to track, manage, and analyze parts of their sales cycle as well as its overall success.

This course describes the components used in Microsoft Dynamics CRM Sales Management and explains how they can apply to various business scenarios. It also details the entities or record types that Microsoft Dynamics CRM uses to track sales from potential to close. With this information, organizations can determine which aspects of the Sales module framework are appropriate for their organization

#### Lessons

- Customer Scenarios
- Basic Record Types

#### Module 2: Lead Management

This module introduces the tracking and management features of the Sales module in Microsoft Dynamics CRM. It is rare that two organizations follow the same sales process, even if the organizations are within the same industry. For this reason, Microsoft Dynamics CRM does not dictate a rigid process. Instead it provides a framework around which an organization can build a custom sales process.

This module describes the components of the Microsoft Dynamics CRM sales process. It also details the entities or record types Microsoft Dynamics CRM uses to track sales from potential to close. With this information, organizations can determine which aspects of the sales process framework are appropriate for them.

#### Lessons

- 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.

#### Module 3: Working with Opportunity Records

In Microsoft Dynamics CRM, qualified leads, such as those that have estimated revenue associated with them, become opportunities. When a prospect or customer expresses qualified interest in buying the business' products or services, that prospect or customer is considered an opportunity.

This is an important part of the sales process because this is where the sales team spends most of its time and effort. The process of working on an opportunity may include several customer interactions. How well the sales team manages this stage can mean the difference between a win and a loss.

Lessons

- Create Opportunities and Work with Opportunity Form
- Changing Opportunity Status

Lab : Managing Sales Opportunities

#### Module 4: Working with the Product Catalog

This course describes the role of the product catalog in Microsoft Dynamics CRM and the benefits of using it. It shows the tasks that are required to configure a product catalog, including setting up and maintaining unit groups, products, and price lists. It also describes and demonstrates the important role of the product catalog and price lists in the sales process.

Lessons

- 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.

#### Module 5: Sales Order Processing

Microsoft Dynamics CRM provides tools that capture important sales information and uncover new business opportunities. Although quotes, orders, and invoices are important to the sales process and provide a complete view of the customer, implementing a sales process allows users to initiate, track, and close sales consistently and efficiently.

The product catalog in Microsoft Dynamics CRM helps companies build a central repository for managing products, services, charges, and fees. The tasks required to set up a product catalog

include setting up and maintaining unit groups, products, and price lists. Microsoft Dynamics CRM also supports discount lists, which help companies provide customers with incentives to buy more products.

#### Lessons

- Adding Line Items (Opportunity Products) to Opportunities
- Quote Management
- Working with Orders
- Working with Invoices

#### Lab : Sales Order Process

#### Module 6: Metrics and Goals

Microsoft Dynamics CRM uses two record types known as Goal Metrics and Goals. These record types combine to provide a powerful, flexible set of goal management features. Goal management allows organizations to track individual, team, and organizational progress toward specific goals.

#### Lessons

- 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 7: Sales Analysis

This module explains the tools that Microsoft Dynamics CRM provides to analyze and report on sales-related information.

#### Lessons

- 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.