

2 Days

Sales and Marketing in Microsoft Dynamics AX 2012

Sales and Marketing in Microsoft Dynamics® AX 2012 is an instructor-led training (ILT) course that provides the knowledge and skills to the students for setting up and using the CRM functionality in the Microsoft Dynamics® AX 2012 Sales and Marketing module.

Objectives:

You should be able to meet the following objectives after the completion of the course:

- Work with mailing lists.
- Working with document handling in Sales and Marketing module
- Setup the Computer Telephone Integration system
- Gain Knowledge of the various parts of the Sales and Marketing module

Course Details

Course Outline

Module 1: Overview

Lessons

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

Module 2: Sales and Marketing Setup

Lessons

- Overview and Scenario
- Sales and Marketing Module Setup
- Transaction Log

Module 3: Sales Management

Lessons

- Overview and Scenario
- The Sales Unit
- Sales Targets
- Management Statistics

Module 4: Prospects

Lessons

- Overview and Scenario
- The Prospect
- Segmentation and Categorization

Module 5: Contact Activities and Responsibilities

Lessons

- Overview and Scenario
- Defining Responsibilities
- Contact Information

Module 6: Telemarketing

Lessons

- Overview and Scenario
- Telemarketing Setup
- Creating Call Lists

Module 7: Campaigns

Lessons

- Overview and Scenario
- Campaign Maintenance

Module 8: Leads and Opportunities

Lessons

- Overview
- Process Definitions
- Leads

Module 9: Case Management

Lessons

- Overview
- Setup
- Working with Cases

Module 10: Common Tools Setup

Lessons

- Overview and Scenario
- Document Management Setup
- Mailing Lists and Merge Files

Who Should Attend

- ?IT professionals who are responsible to set up CRM processes throughout the customer's sales process.
- Customers with a basic knowledge of CRM processes are preferred.
- IT professionals having understanding of the Microsoft Dynamics AX 2012 Sales and Marketing module.

Pre Requisite

The students should have knowledge of the following, before attending this course:

- Introduction to Microsoft Dynamics® AX 2012

Exams

Microsoft Certified Professional (MCP) []

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