1 Days

Sales Management in Microsoft Dynamics CRM 2013

This course introduces the capabilities of Sales Management in Microsoft Dynamics CRM 2013 that allow you to track and manage the sales process from potential to close. This course provides insight on sales process information, and introduces the tools available to analyze and report on sales information. This course guides you through the tools that help make the internal processes simpler and easier so your sales force can focus on what is important

Course Details

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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.

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.

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.

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.

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.

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.

Module 7: Sales Analysis

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

Who Should Attend

This course is intended for individuals that plan to implement, use, maintain, or support Microsoft Dynamics CRM 2013 in their organization. The training is intended for sales representatives, administrators, office managers, CEOs, and consultants who want to learn the available sales features within Microsoft Dynamics CRM 2013.

Pre Requisite

Before attending this course, students must have:

- General knowledge of Microsoft Windows
- General knowledge of Microsoft Office
- An understanding of Customer Relationship Management solution processes and practices.

Exams

Microsoft Certified Professional (MCP) []

Date - Jun 13, 2025