

# Microsoft CRM EU: 4.0 for Sales Professionals

**Vendor Course Code:** MSCRMSALES

**Course Length:** 1 day

**Overview:** This one-day instructor-led course provides students with the knowledge and skills to improve their day to day working environment by using the Sales module within CRM.

**Skills Gained:** After completing this course, students will be able to:

- Navigate Microsoft CRM and understand the standard application terminology
- Understand how to manage suspects and prospects – when to use leads or opportunities
- Sales functionality, including Lead, Opportunity, Quote, Order and Invoice
- Advanced finds for pipeline management
- Competitor Analysis – opportunities lost to competitors with \$ values

**Key Topics:**

## Key Topics

### Module 1:

- 1.1 Microsoft Outlook and Dynamics CRM
- 1.2 Microsoft CRM Modules
- 1.3 Sales Management Module

### Module 2: Working within the Sales Module

- 2.1 Navigating Workplace
- 2.2 Navigating Sales

### Module 3: Sales Functionality: Lead to Order

- 3.1 Managing Leads
- 3.2 Lead Activities
- 3.3 Search for leads
- 3.4 Disqualify and close a lead
- 3.5 Reactivate a lead
- 3.6 Qualify a lead
- 3.7 Opportunities
- 3.8 Quotes
- 3.9 Revise and activate quotes
- 3.10 Close quotes and opportunities
- 3.11 Orders
- 3.12 Invoices

### Module 4: Account and Contact Management

- 4.1 Contacts
- 4.2 Accounts
- 4.3 Workflow and Sales Processes
- 4.4 Managing activities and calendar
- 4.5 Sales Literature

### Module 5: Advanced Sales Functionality

- 6.1 Advanced finds – leads, opportunities etc.
- 6.2 Creating a marketing list
- 6.3 Quick Campaigns

**Target Audience:** Sales users of CRM 4.0

**Prerequisites:**

Microsoft CRM EU: 4.0 Introduction