

Managing Your Sales Process

With the proper foundational understanding of the CRM capabilities in your Microsoft Dynamics 365 Business Central / NAV system, you're ready to turbo-charge your sales process with a best-practices based yet flexible pipeline management system. We'll walk through the sales cycle to identify how the system can support your whole sales team, while tracking interactions and insights to help you close more. We'll cover the entire sales cycle through orders to invoicing and reporting to make sure you're equipping your sales team with the tools they need.

Class topics

- Campaigns, Pricing and Discounting
- Sales Opportunities and Sales Cycles
- Sales Pipeline and Interactions
- Sales Quotes, Orders and Invoicing
- Sales Credit and Rebills
- Sales Reporting

Who Should Attend?

Anyone in on the sales, customer service, or field service teams interested in understanding the basics of a powerful customer relationship tool already included in their Business Central / NAV system.

Learning Objectives:

At the end of this class, participants will be able to:

- Explain the customer lifecycle and how it is supported in the system
- Set up an opportunity, track progress and to-do's, and track sales activities
- Issues quotes and convert them to orders
- Configure the sales pipeline and reporting options

Field of Study: Computer Software & Applications

Program Level: Basic

Prerequisites: Managing Your Customers

Advanced Preparation: Each student will receive via email connection instructions to their individual virtual classroom link and hands-on practice environment shortly before class. Connections to both resources should be tested before class. We recommend using a second monitor while attending class.

Delivery Method: Group Internet-based

CPE Credits: By participating in this class, you are eligible to earn up to 4 CPE credits which will be distributed following class completion. In order to be awarded the full credit hours, you must notify your instructor of your intention to request credit before the start of the first class. To receive CPE credit, you must be present and actively engaged, which will be verified using polling questions and other means. You will not receive CPE credit for any portion of the class that you do not appear fully engaged.

Version: This class is taught in Microsoft Dynamics 365 Business Central.

Learning environment: As experienced trainers of adult learners, we understand how to make training “stick”. We use proven practices to make sure you retain what you learn and are fully equipped to immediately apply what you discovered in class. Each day, you will spend more than 50% of your time doing hands-on exercises in our simulated learning environment.

Refund and Cancellation Policy: Please refer to our Refund and Cancellation policy [here](#).