New View Strategies
Rethink Today for Tomorrow

Relationship Management Boot Camp

Every business needs a CRM system. What if we told you that you already have one. It has a full set of features, it's already fully integrated with Business Central / NAV, it's also already integrated with Outlook, and it's ready to use. If you're looking for a CRM add-on like Dynamics 365 Customer Enablement or Salesforce, don't spend another minute on that effort until you take this Boot Camp.

As Sales Manager, you know the hardest part of any CRM implementation is realizing user adoption. The Relationship Management module inside BC / NAV immediately overcomes this issue as it's a tool you already use! Get ready to discover a powerful tool to help you manage your sales processes and pipeline. Without fail, students of this Boot Camp have been amazed how many sales enabling features are included inside BC – don't continue to miss out!

Class agenda
Day 1 (4 hours) – Managing Your Customers

- Customers and Contacts Setup
- Customers and Contacts Management
- Customer Creation from the Contact
- Questionnaires, Mail Groups and Segments
- Sales Quotes Introduction

Day 2 (4 hours) – Managing Your Sales Process

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

Day 3 (4 hours) – Sales and Inventory Analysis Reporting

- Available data
- Outlook Integration
- Canned sales and inventory reports
- Inventory analysis report
- Export to Excel and Analysis

Who Should Attend?
Sales Managers, small business owners, and anyone looking to grow sales for their organization.

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

- Understand the sales tools available inside Business Central / NAV
- Make their existing sales process more efficient and proactive
- Target specific functions to drive opportunity volume and higher close rates

- Run and leverage common reports to gain insights on sales trends, inventory levels, and customer volumes

Field of Study: Computer Software & Applications

Program Level: Basic

Prerequisites: Successful completion of Navigation & Personalization class.

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 12 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.