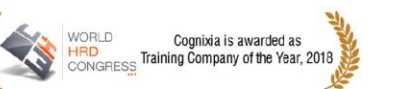




## Microsoft Dynamics CRM 2016 Sales (MB2-713)

In association with : **Silver  
Microsoft  
Partner**



## **Manage Microsoft Dynamics CRM components and the product catalogue**

### Manage Dynamics CRM sales management components

- Understand different record types; create, maintain and use sales literature; create, maintain and use competitors; understand sales territories; manage currency configurations; understand social engagement

### Manage the product catalogue

- Understand the role of the product catalogue and price lists; manage unit groups; manage products; manage price lists; manage discount lists; manage currencies; create product families and properties; manage product bundles; view products in hierarchical charts

## **Manage leads, opportunities and sales**

### Manage leads

- Understand the role of lead and opportunity records; understand the lead to the opportunity process flow; use the lead to the opportunity process form and the process ribbon; track leads; convert activity records to leads

### Manage opportunities

- Create and manage opportunities; manage opportunity records; connect competitors to opportunities; view resolution activities; work with opportunities from views; add a contact to an opportunity

### Manage the sales order process

- Add line items to opportunities; create and add write-in products and opportunities; select alternative price lists for opportunities; understand the process of the quotes life cycle; manage quotes; work with orders; work with invoices; convert quotes to orders and convert orders to invoices

## **Manage metrics and perform sales analysis**

### Manage metrics and goals

- Configure sales metrics; configure fiscal periods; create and assign goal records; define parent and child records; create and recalculate parent and child goal records; create rollup queries

### Perform sales analysis

- Use built-in reports; export sales information to Microsoft Excel; work with charts and dashboards; work with system charts from an opportunity list; create dashboards; share dashboards and charts; perform advanced find queries; work with Microsoft Power BI dashboards

## **Integrate Microsoft Dynamics CRM with other products**

### Configure email integration

- Configure email server synchronisation; configure server settings, server profiles and mailbox configurations; migrate to server-side synchronisation; configure synchronisation options; configure email client integration; use folder tracking; use the Dynamics CRM app for Outlook

### Configure collaboration

- Configure Microsoft SharePoint integration; set up SharePoint documents; use SharePoint documents; use Skype and Skype for Business with Dynamics CRM; use Microsoft Yammer with Dynamics CRM; use Office Groups with Dynamics CRM

### Configure Office productivity

- Work with Excel; export to Excel; work with Power BI; analyse data with Power BI; visualise data with Excel and Power BI to create an immersive experience; configure OneNote integration; use OneNote with Dynamics CRM





**Thank You**

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