

Microsoft Dynamics

CRM/365 Course

Content



Functional & Administration

Introduction to Microsoft Dynamics CRM

- Dynamics product Stack
- History of Microsoft Dynamics CRM
- Editions in Microsoft Dynamics CRM
- Deployment types & Licensing Options
- Comparison with other CRM's in the Market
- XRM Framework
- Out of Box Features (OOB Concepts)

Sales Module

- Lead Management
- Opportunity Management
- Product Management
- Quotes, Orders and Invoices
- Goal Management

Marketing Module

- Marketing Lists
- Campaigns
- Sales Literature
- Quick Campaigns

Service Module

- Services
- Service Calendar
- Case Management
- Knowledge Base
- Contracts

Settings & Configuration

Business Management

- Sites, Sales Territories, Facilities and Resource Groups
- Working with Multi Currency
- System Queues and Custom Queues
- Services and Business Closures
- Fiscal Year Settings
- Subjects
- Connections

Data Management

- Duplication Detection Settings, Rules and Jobs
- Bulk Record Deletion
- Data Maps and Imports

Product Catalog

- Understanding the Product Catalog
- Unit Groups
- Adding Products
- Creating Price Lists
- Creating Discount Lists

Workflows & Real Time Workflows

Business Process Flows

Business Rules

Dialogs



Partners :



Java



development | consultancy | training

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