

Course Information

Duration: 10.00am – 4pm is the recommended length for a full days training course. Sometimes this can be adjusted to better meet the client's needs and IT users' competency.

Target Audience: Everyone who uses MS Dynamics CRM should attend this course to ensure they have a good general knowledge of how the software works and how they can make it work for them.

Course Objectives: To give a good, general introduction to using MS Dynamics CRM. Everything you need to know about using the software on a daily basis to manage your regular contact with prospects and clients.

Course Details

1. Introduction
2. Logging into MS CRM
3. Screen Layout, Tool Bar and Folders
4. Types of Record
5. Navigating and Searching for Records
6. Contact Records and what information they can store
7. Creating Records
8. Scheduling Activities
9. Viewing your own Activities
10. Completing Activities
11. Using the Calendar and Activity List
12. Tracking – Linking Emails from Outlook
13. Creating and progressing Leads and Opportunities
14. Creating Quotes and Converting to Orders

MAS offer a variety of flexible training options. To discuss your company's training requirements and get advice on the most cost effective training for you, please call the MAS Team who will do their best to help 0844 7454588.