

# Dynamics CRM Sales Training

**Duration: Half Day**

## Leads

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- Difference between Leads and Accounts / Opportunities
- Working with Leads
- Creating Leads
- Qualification Process

## Opportunity Management

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- The Sales Process
- Creating Quotes
- Adding Products to Quotes
- Revising
- Closing Quotes
- Closing Opportunities

## Analysis & Reporting

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- Creating reports in advances find with AND/OR Groups
- Exporting reports to Microsoft Excel
- Charts
- Goals & Metrics