

CRM Sales-101

CRM Overview

Creating and managing Leads

Creating and managing Activities

Working with Outlook Activities

Converting Leads

Managing Accounts and Contacts

Managing Opportunities

Reporting on my Leads and Opportunities

Setting Personal Options

Working with Outlook Contacts

Setting Outlook Synchronization Options

CRM Service-101

CRM Overview

Managing Accounts and Contacts

Creating and Managing Contracts

Creating and Managing Cases

Working with the Knowledgebase

Working with Queues

Creating and Managing Activities

Reporting on my Cases and Activities

Working with Outlook Activities

Setting Personal Options

CRM Marketing

Tracking Lead Source and Source Campaigns

Targeting with dynamic lists (Advanced Find)

Targeting with static lists (Marketing Lists)

Working with Email Templates

Tracking open rates, click-thrus, and unsubscribes

Creating Mail Merge Templates with Word

Creating Quick Campaigns (single step)

Creating Campaigns (multi-step)

Using Workflows for automated campaigns

Reporting on Campaigns and marketing results

CRM Champion

Mastering Advanced Find

Excel Reports, Dashboards, and Report Wizard

Creating Mail Merge Templates with Word

Working with Email Templates

Creating Contract Templates

Managing the Knowledgebase

Creating Workflows

System Administrator

Creating Users and Security

Adjusting System Settings

Configuring CRM

Creating Workflows

Supporting the CRM Server

Supporting CRM on the Workstation

Supporting Users

Visit

<http://www.powerobjects.com>

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on Microsoft Dynamics CRM
training and implementations.