Course Syllabus

Microsoft Dynamics™ AX 2009 Sales & Marketing
(Elements of this syllabus are subject to change.)

Key Data:

Course number: 8624
Instructor-Led Training (lecture and labs)
Student Materials: Microsoft Official Curriculum (MOC)

Microsoft Dynamics™ AX 2009 Sales and Marketing

Sales and Marketing Module helps you to enrich your knowledge and skills to implement, adjust, or use the Sales and Marketing module. It is advisable for the participants to have a basic working knowledge of Microsoft Dynamics AX.

Chapter 1: Overview

This chapter introduces students to the Microsoft Dynamics AX Sales and Marketing course and the topics covered in the following chapters.

Lessons
• Course Description • General Sales and Marketing module information • Chapter Content

Chapter 2: Customer Relationship Management

This chapter explains the basic principles of Customer Relationship Management (CRM) and the possibilities that the use of IT brings to CRM. The chapter describes the key elements in the Microsoft Dynamics AX Sales and Marketing module that refer to basic customer relationship management.

Lessons
• Customer Relationship Management • The Customer • Sales and Marketing and CRM

Chapter 3: Sales and Marketing Setup

This chapter explains how to set up the Microsoft Dynamics AX CRM module. These procedures are used by all professionals involved with implementing and maintaining an installation of Microsoft Dynamics AX CRM.

Lessons
• Sales and Marketing Module Setup • Connecting Employees with User IDs • Transaction Log

Chapter 4: Business Relations
This chapter explains how to set up, create, and maintain business relations. The reports available for business relations are also explained.

Lessons
• The Business Relation • Segmentation and Categorization • Working with Business Relations • Importing Business Relations • Reports for the Sales Organization

Chapter 5: Contact Persons

This chapter explains how to set up, create, and maintain contact persons. Activities are also explained.

Lessons
• Defining Salesperson Responsibilities • The Contact Person • Activities

Chapter 6: Sales Quotations

This chapter explains how to set up, maintain, and process quotations. The Sales and Marketing module enables sales personnel to issue quotations to their business relations, track the progress of the quotations, follow-up on won or lost quotations, determine the probability of the business relation accepting the quotation, analyze the historical record of quotations to a particular business relation or contact person, and track competitive quote information . The reports available for quotations are also explained.

Lessons
• Quotations • Quotation Default Values • Working with Quotations • Quotation Reports

Chapter 7: The Marketing Organization

This chapter explains how the Campaign module in Microsoft Dynamics AX lets you segment the audience by meaningful profiles to refine a marketing message, execute a campaign, track responses, and automatically send the correct literature to all targets. You also learn how expenses related to the campaign are displayed on the Campaigns form. It enables marketing personnel to gain an expense overview in addition to a sales overview. You can gain an overview of all activities, expenses, and business relations in one collected framework.

Lessons
• Marketing Automation • The CRM Encyclopedia • Distribution of Campaign Responsibilities • Reports in the Campaign Module

Chapter 8: Telemarketing

This chapter explains how Microsoft Dynamics AX facilitates creating, registering, and administering the telephonic contact between a company and its business relations. The contact can be for direct marketing purposes or be associated with a questionnaire or other activities directed toward a particular contact person.

Lessons
• Telemarketing Setup • Creating and Working with Call Lists • Working with Telemarketing • Reports in Telemarketing

Chapter 9: Sales Management

This chapter explains creating and maintaining sales units, sales targets and management statistics in addition to the reports available for sales management.

Lessons
• The Sales Unit • Sales Targets • Management Statistics • Reports in Sales Management

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Chapter 10: Common Tools Setup

This chapter details how to set up, maintain, and use document handling in the Sales and Marketing module in addition to how to set up, maintain, and use Sales and Marketing synchronization with Microsoft Outlook. Additionally, the chapter describes how to create mailing lists and merge files and how to incorporate a Computer Telephone Integration (CTI) system using the Microsoft TAPI protocol.

Lessons
• Document Handling • Mailing Lists and Merge Files • Microsoft Dynamics AX and Outlook Synchronization • Computer Telephone Integration

At Course Completion

- Understand the theory and concepts of contemporary customer relationship Management.
- Perform the necessary setup involved in the use of the Sales and Marketing module
- Set up the categorizations necessary to use the business relations functionality correctly
- Create and maintain business relations
- Set up and maintain the contact person(s) connected with a business relation
- Set up and maintain (plan) activities for business relations
- Create and send quotations to business relations
- Create and structure a campaign
- Associate a campaign to a project
- Define campaign targets
- Execute a telemarketing initiative using Microsoft Dynamics AX Sales and Marketing Functionality.
- Reflect the sales organization by creating sales units
- Attach employees to the created sales units and maintain them
- Define sales targets for the sales unit and sales personnel
- Set up and maintain synchronization from the Sales and Marketing module to Microsoft® Outlook®.
- Create and attach a document to an activity, business relation, or contact person.