



# Dynamics 365: Basics for Sales Managers

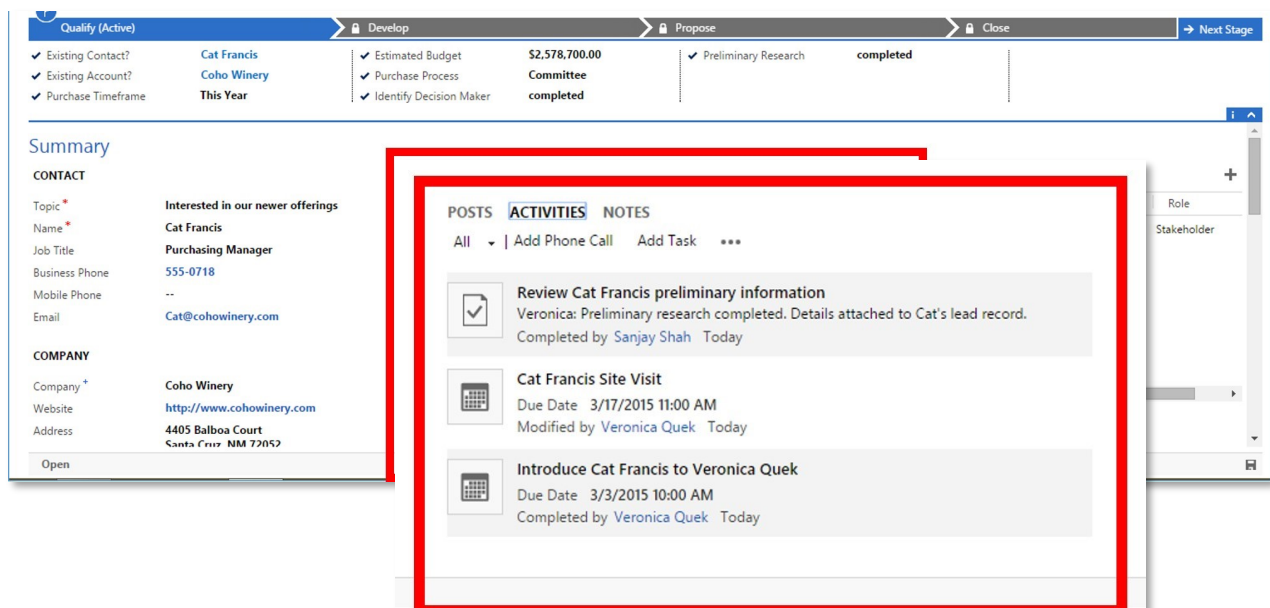
Microsoft Dynamics 365 provides several ways to manage and help your Sales team get the results your organization needs. To keep things simple, let's look at 4 Dynamics 365 sales management basics that will help you direct your team more effectively:

- Track sales-related activities of individuals and teams
- Review, revise, and take action on sales pipeline
- Analyze sales history
- Access Management Reports

## Sales-Related Activities

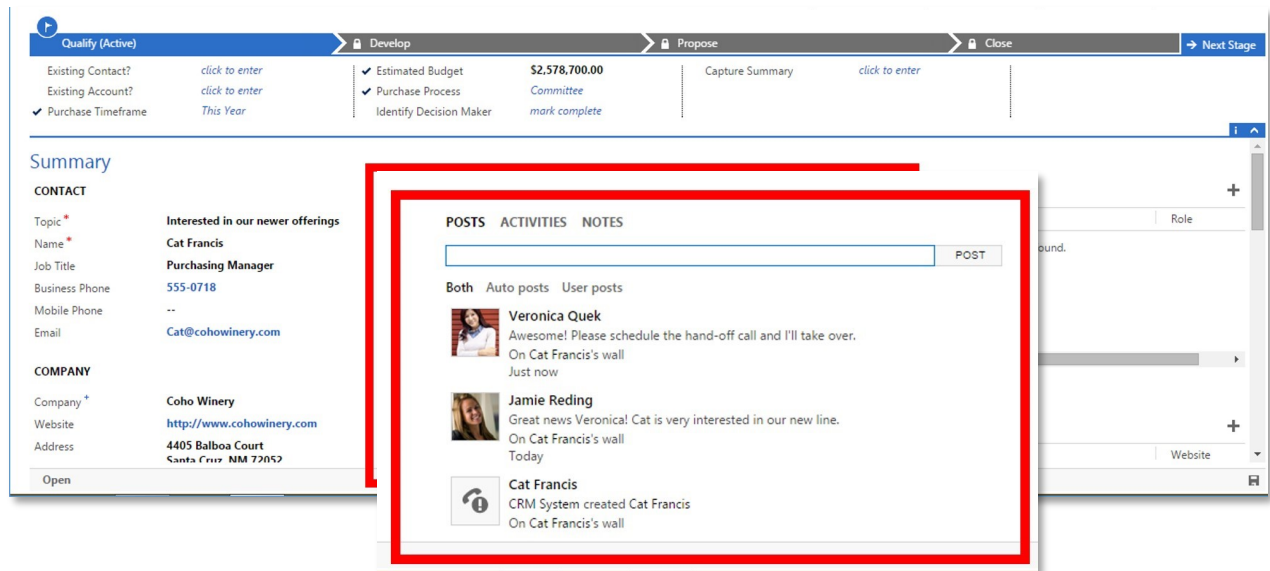
Activities are all the things your team does in pursuit of a sale. Things like phone calls, emails, appointments and so on. There are multiple ways to keep up with your team's sales-related Activities using Dynamics 365. Activity records "live" in your Lead, Opportunity, Contact, and Account records.

Activities are displayed in chronological order. Look for open and completed sales activities like phone calls and appoints, for the entire sales team or for individual salespeople. Here's an example of Activities displayed in a Lead record.

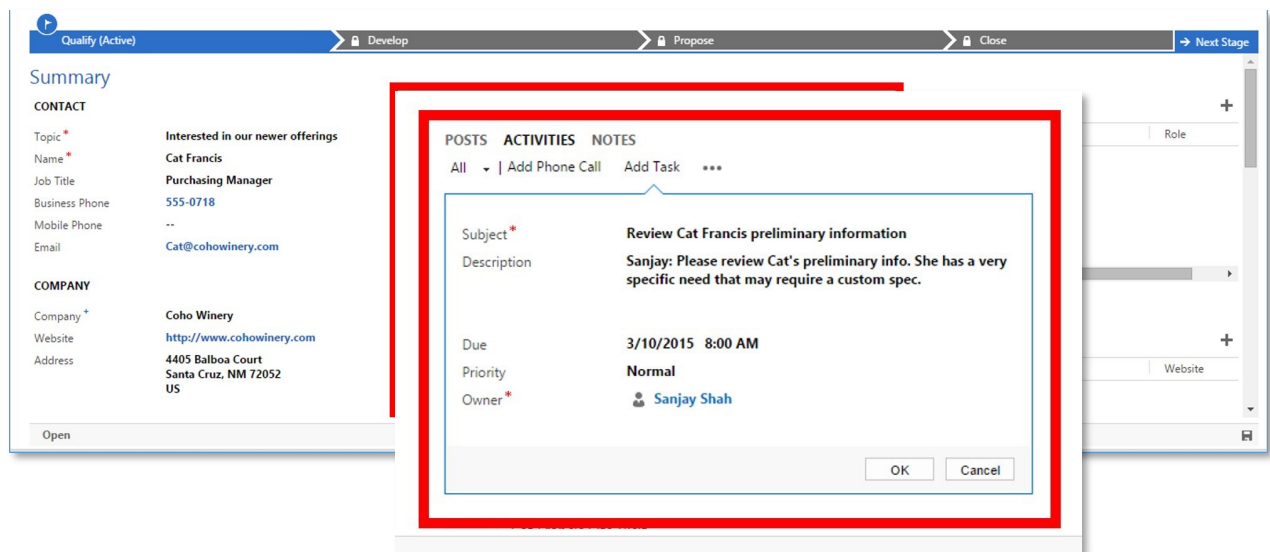


The screenshot displays the Dynamics 365 interface for a Lead record. At the top, there are tabs for 'Qualify (Active)', 'Develop', 'Propose', and 'Close', with 'Next Stage' button on the right. Below the tabs, there are several key-value pairs: 'Existing Contact?' (Cat Francis), 'Existing Account?' (Coho Winery), 'Purchase Timeframe' (This Year), 'Estimated Budget' (\$2,578,700.00), 'Purchase Process' (Committee), 'Identify Decision Maker' (completed), and 'Preliminary Research' (completed). A 'Summary' section on the left lists contact and company details for 'Cat Francis' (Purchasing Manager at Coho Winery). The main area shows a list of activities under the 'ACTIVITIES' tab, including 'Review Cat Francis preliminary information', 'Cat Francis Site Visit', and 'Introduce Cat Francis to Veronica Quek'. A red box highlights the activities list.

Use the collaboration tools in Microsoft Dynamics 365 get your team working together, communicating in a social-network style of interaction. Posts in the social pane resemble posts in familiar apps such as Twitter and Facebook. Following on the experience of social sites your team members are used to, these posts display not just in the Lead record, but also in the individual User's Social Dashboard.

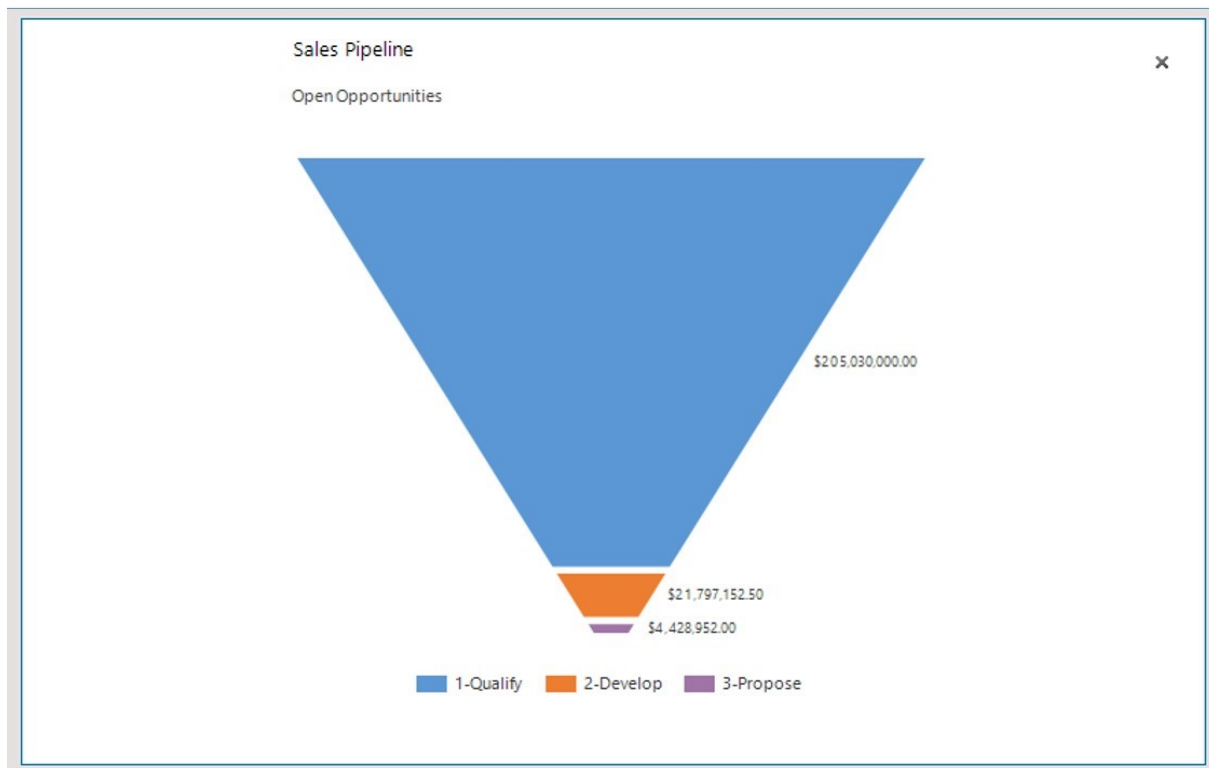


Users can easily schedule future tasks for themselves or other team members right within the relevant record. In this scenario, salesperson Veronica creates a task for her team member Sanjay, provides Sanjay with a description of what needs to be done as well as a due date. This Task will appear in the related record as well as on Sanjay's Activity view.



## Review and Take Action on Sales Pipeline

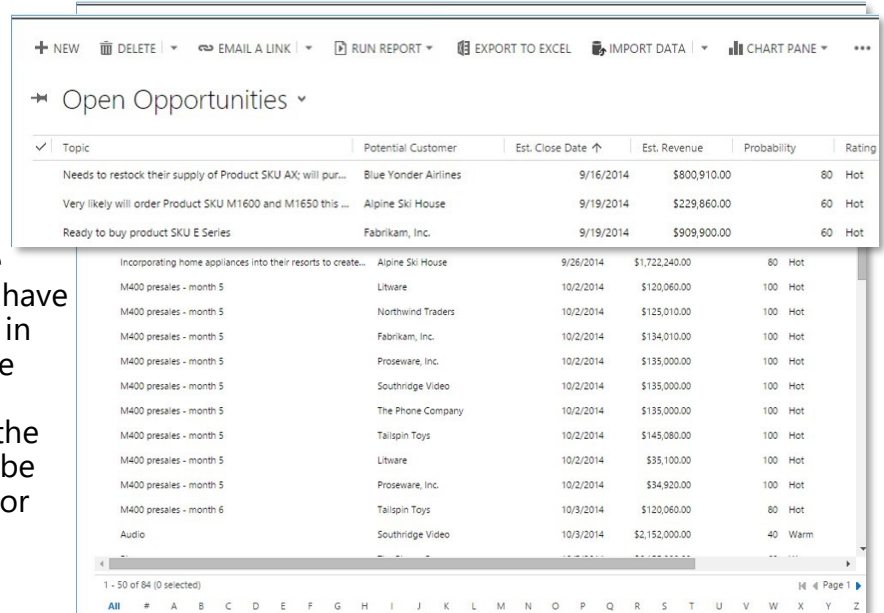
A key metric that Sales Managers routinely focus on is sales pipeline. Dynamics 365 provides managers with a complete view of forecasted sales, with the ability to segment the pipeline by product, by territory, by salesperson, or by sales stage. In this example the sales pipeline is displayed as a sales funnel segmented by sales stage. Potential sales in the blue portion of the funnel are in the Lead or Qualifying stage. The brown section represents Opportunities in the Develop stage and the purple part represents opportunities in the Propose stage.



Click on the funnel to uncover the underlying data and to view the individual deals that comprise the full pipeline. In this View the pipeline is displayed in a manner that is similar to an Excel spreadsheet. Resort or filter columns to narrow down the pipeline view. For instance you may only want to look at deals with a probability of 50% or higher, or deals closing in the current month.



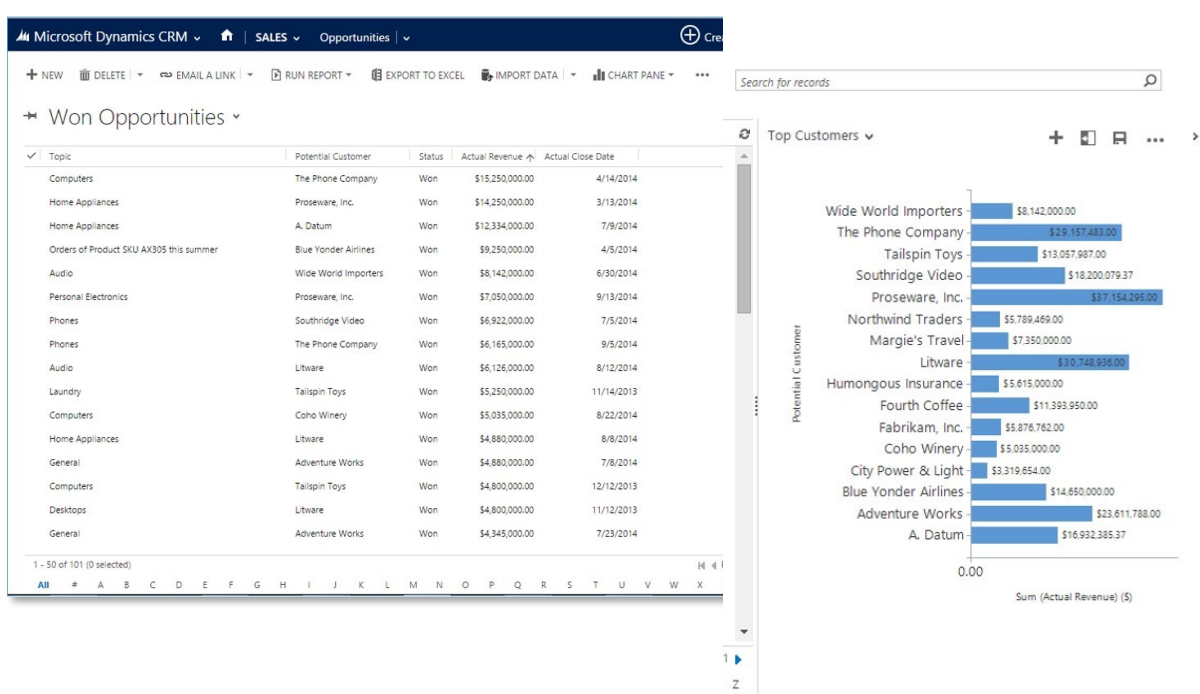
Click on any single line item to drill down to an individual sales opportunity. Check on the most recent phone calls or appointments. Use this information to take action. Follow up with the sales rep that owns the opportunity, or reach out directly to the customer. As Sales Manager, you have the permissions to change values in the record such as estimated close date or estimated revenue. Any changes you make will roll up to the pipeline forecast in real time and be reflected in any view, dashboard, or report.



Topic	Potential Customer	Est. Close Date	Est. Revenue	Probability	Rating
Needs to restock their supply of Product SKU AX; will pur...	Blue Yonder Airlines	9/16/2014	\$800,910.00	80	Hot
Very likely will order Product SKU M1600 and M1650 this ...	Alpine Ski House	9/19/2014	\$229,860.00	60	Hot
Ready to buy product SKU E Series	Fabrikam, Inc.	9/19/2014	\$909,900.00	60	Hot
Incorporating home appliances into their resorts to create...	Alpine Ski House	9/26/2014	\$1,722,240.00	80	Hot
M400 presales - month 5	Litware	10/2/2014	\$120,060.00	100	Hot
M400 presales - month 5	Northwind Traders	10/2/2014	\$125,010.00	100	Hot
M400 presales - month 5	Fabrikam, Inc.	10/2/2014	\$134,010.00	100	Hot
M400 presales - month 5	Proseware, Inc.	10/2/2014	\$135,000.00	100	Hot
M400 presales - month 5	Southridge Video	10/2/2014	\$135,000.00	100	Hot
M400 presales - month 5	The Phone Company	10/2/2014	\$135,000.00	100	Hot
M400 presales - month 5	Tailspin Toys	10/2/2014	\$145,080.00	100	Hot
M400 presales - month 5	Litware	10/2/2014	\$35,100.00	100	Hot
M400 presales - month 5	Proseware, Inc.	10/2/2014	\$34,920.00	100	Hot
M400 presales - month 6	Tailspin Toys	10/3/2014	\$120,060.00	80	Hot
Audio	Southridge Video	10/3/2014	\$2,152,000.00	40	Warm

### Analyze Sales History

Sales history can be accessed in multiple ways. Choose which way is most practical based on how you want to analyze sales or manage your team. Select the Won Opportunities View to see a spreadsheet-style display of previous sales sortable by customer or sales revenue. Refer to the bar chart on the right to see total sales per customer.

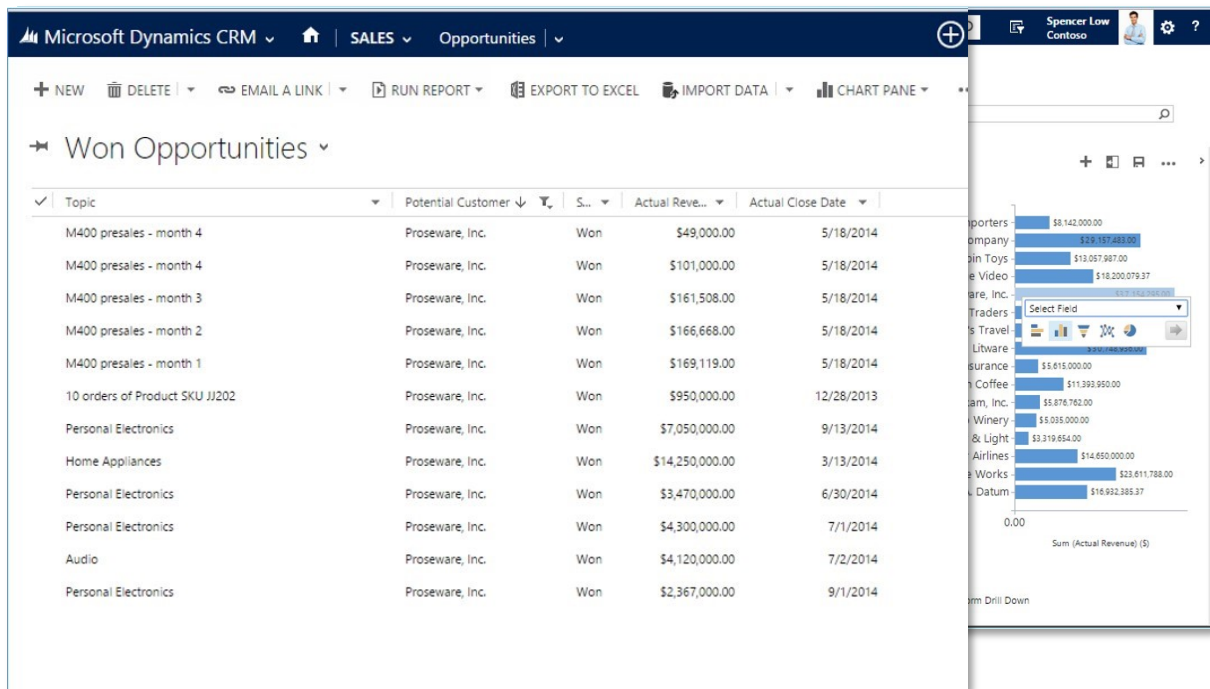


Topic	Potential Customer	Status	Actual Revenue	Actual Close Date
Computers	The Phone Company	Won	\$15,250,000.00	4/14/2014
Home Appliances	Proseware, Inc.	Won	\$14,250,000.00	3/13/2014
Home Appliances	A. Datum	Won	\$12,334,000.00	7/9/2014
Orders of Product SKU AX305 this summer	Blue Yonder Airlines	Won	\$9,250,000.00	4/5/2014
Audio	Wide World Importers	Won	\$8,142,000.00	6/30/2014
Personal Electronics	Proseware, Inc.	Won	\$7,050,000.00	9/13/2014
Phones	Southridge Video	Won	\$6,922,000.00	7/5/2014
Phones	The Phone Company	Won	\$6,165,000.00	9/5/2014
Audio	Litware	Won	\$6,126,000.00	8/12/2014
Laundry	Tailspin Toys	Won	\$5,250,000.00	11/14/2013
Computers	Coho Winery	Won	\$5,035,000.00	8/22/2014
Home Appliances	Litware	Won	\$4,880,000.00	8/8/2014
General	Adventure Works	Won	\$4,880,000.00	7/8/2014
Computers	Tailspin Toys	Won	\$4,800,000.00	12/12/2013
Desktops	Litware	Won	\$4,800,000.00	11/12/2013
General	Adventure Works	Won	\$4,345,000.00	7/23/2014

Potential Customer	Sum (Actual Revenue) (\$)
Wide World Importers	\$8,142,000.00
The Phone Company	\$29,157,483.00
Tailspin Toys	\$13,057,987.00
Southridge Video	\$18,200,079.37
Proseware, Inc.	\$37,154,295.00
Northwind Traders	\$5,789,469.00
Margie's Travel	\$7,350,000.00
Litware	\$30,748,936.00
Humongous Insurance	\$5,615,000.00
Fourth Coffee	\$11,393,950.00
Fabrikam, Inc.	\$5,876,762.00
Coho Winery	\$5,035,000.00
City Power & Light	\$3,319,654.00
Blue Yonder Airlines	\$14,650,000.00
Adventure Works	\$23,611,788.00
A. Datum	\$16,932,385.37

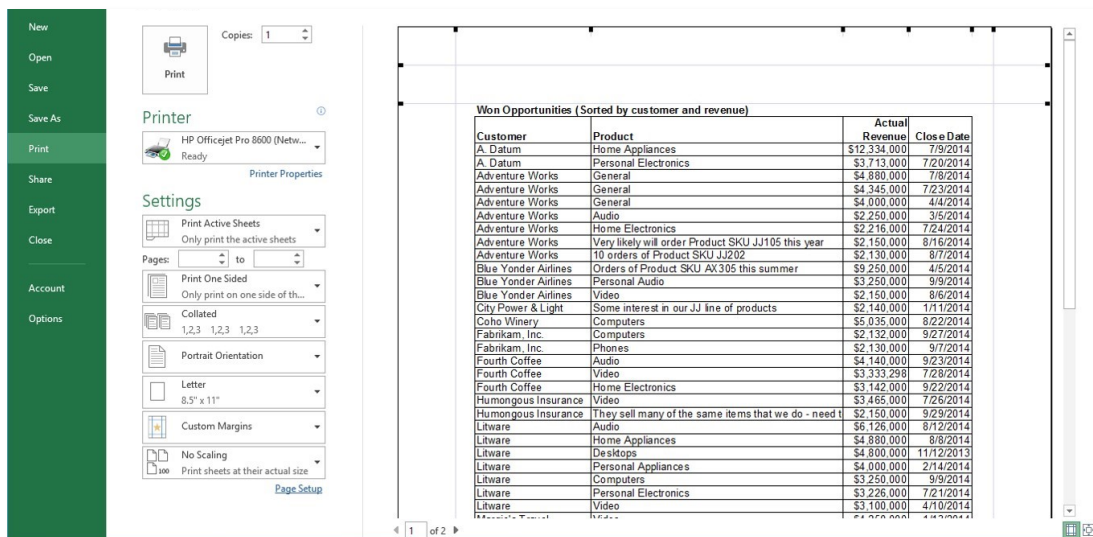
Click on an individual customer bar in the chart to pull up just their won opportunities.



The screenshot shows the Microsoft Dynamics CRM interface. The main window displays a table titled 'Won Opportunities' with columns for Topic, Potential Customer, Status, Actual Revenue, and Actual Close Date. The table lists various products like 'M400 presales' and '10 orders of Product SKU JJ202' from 'Proseware, Inc.' with a total revenue of \$2,367,000.00. An inset window shows a bar chart titled 'Actual Revenue' with a 'Select Field' dropdown and a 'Drill Down' button. The chart shows revenue bars for various customers, with the highest being 'A. Datum' at \$116,932,365.37.

Topic	Potential Customer	Status	Actual Revenue	Actual Close Date
M400 presales - month 4	Proseware, Inc.	Won	\$49,000.00	5/18/2014
M400 presales - month 4	Proseware, Inc.	Won	\$101,000.00	5/18/2014
M400 presales - month 3	Proseware, Inc.	Won	\$161,508.00	5/18/2014
M400 presales - month 2	Proseware, Inc.	Won	\$166,668.00	5/18/2014
M400 presales - month 1	Proseware, Inc.	Won	\$169,119.00	5/18/2014
10 orders of Product SKU JJ202	Proseware, Inc.	Won	\$950,000.00	12/28/2013
Personal Electronics	Proseware, Inc.	Won	\$7,050,000.00	9/13/2014
Home Appliances	Proseware, Inc.	Won	\$14,250,000.00	3/13/2014
Personal Electronics	Proseware, Inc.	Won	\$3,470,000.00	6/30/2014
Personal Electronics	Proseware, Inc.	Won	\$4,300,000.00	7/1/2014
Audio	Proseware, Inc.	Won	\$4,120,000.00	7/2/2014
Personal Electronics	Proseware, Inc.	Won	\$2,367,000.00	9/1/2014

Export the report to Excel to reformat, print, or run "what if" scenarios.



The screenshot shows the print settings dialog in Microsoft Dynamics CRM. The 'Printer' is set to 'HP Officejet Pro 8600 (Netw...)' and the 'Settings' include 'Print Active Sheets', 'Print One Sided', 'Collated', 'Portrait Orientation', 'Letter 8.5" x 11"', and 'No Scaling'. The background shows an Excel spreadsheet titled 'Won Opportunities (Sorted by customer and revenue)'. The spreadsheet has columns for Customer, Product, Actual Revenue, and Close Date. The data is sorted by customer and revenue, with 'A. Datum' having the highest revenue at \$12,334,000.00.

Customer	Product	Actual Revenue	Close Date
A. Datum	Home Appliances	\$12,334,000	7/9/2014
A. Datum	Personal Electronics	\$3,713,000	7/20/2014
Adventure Works	General	\$4,880,000	7/8/2014
Adventure Works	General	\$4,345,000	7/23/2014
Adventure Works	General	\$4,000,000	4/4/2014
Adventure Works	Audio	\$2,250,000	3/5/2014
Adventure Works	Home Electronics	\$2,216,000	7/24/2014
Adventure Works	Very likely will order Product SKU JJ105 this year	\$2,150,000	8/16/2014
Adventure Works	10 orders of Product SKU JJ202	\$2,130,000	8/7/2014
Blue Yonder Airlines	Orders of Product SKU AX 305 this summer	\$9,250,000	4/5/2014
Blue Yonder Airlines	Personal Audio	\$3,250,000	9/9/2014
Blue Yonder Airlines	Video	\$2,150,000	8/6/2014
City Power & Light	Some interest in our JJ line of products	\$2,140,000	1/11/2014
Coho Winery	Computers	\$5,035,000	8/22/2014
Fabrikam, Inc.	Computers	\$2,132,000	9/27/2014
Fabrikam, Inc.	Phones	\$2,130,000	9/11/2014
Fourth Coffee	Audio	\$4,140,000	9/23/2014
Fourth Coffee	Video	\$3,333,298	7/28/2014
Fourth Coffee	Home Electronics	\$3,142,000	9/22/2014
Humongous Insurance	Video	\$3,465,000	7/26/2014
Humongous Insurance	They sell many of the same items that we do - need t	\$2,150,000	9/29/2014
Litware	Audio	\$6,126,000	8/12/2014
Litware	Home Appliances	\$4,880,000	8/8/2014
Litware	Desktops	\$4,800,000	11/12/2013
Litware	Personal Appliances	\$4,000,000	2/14/2014
Litware	Computers	\$3,250,000	9/9/2014
Litware	Personal Electronics	\$3,226,000	7/21/2014
Litware	Video	\$3,100,000	4/10/2014

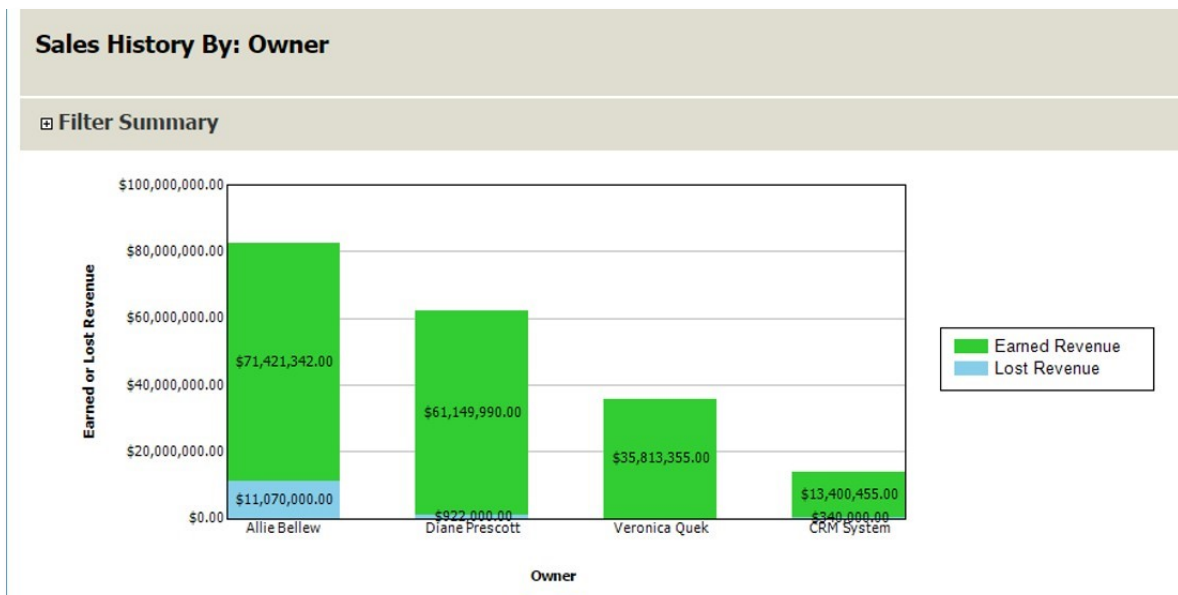
## Run Management Reports

Stock reports are available anytime featuring real-time sales data.

Available Reports Search for records

Name ↑	Report Type	Modified On	Description
Invoice	Reporting Services Report	3/23/2015 8:49 AM	View an invoice and its line items.
Invoice Status	Reporting Services Report	3/23/2015 8:49 AM	View your accounts receivable.
Lead Source Effectiveness	Reporting Services Report	3/23/2015 8:49 AM	Compare your lead sources.
Neglected Accounts	Reporting Services Report	3/23/2015 8:49 AM	Identify accounts that have not been contacted recently.
Neglected Cases	Reporting Services Report	3/23/2015 8:49 AM	Identify cases that have not been contacted recently.
Neglected Leads	Reporting Services Report	3/23/2015 8:49 AM	Identify leads that have not been contacted.
Order	Reporting Services Report	3/23/2015 8:49 AM	View an order and its line items.
Products By Account	Reporting Services Report	3/23/2015 8:49 AM	View products that are used by an account.
Products By Contact	Reporting Services Report	3/23/2015 8:49 AM	View products that are used by a contact.
Progress against goals	Reporting Services Report	3/23/2015 8:49 AM	View progress against goals.
Quote	Reporting Services Report	3/23/2015 8:49 AM	View a quote and its line items.
Sales History	Reporting Services Report	3/23/2015 8:49 AM	Understand past sales performance.
Sales Pipeline	Reporting Services Report	3/23/2015 8:49 AM	View anticipated potential sales.
Top Knowledge Base Articles	Reporting Services Report	3/23/2015 8:49 AM	Identify the most frequently used knowledge base articles.
User Summary	Reporting Services Report	3/23/2015 8:49 AM	View user contact and security role information.

You can group data in the sales reports to sort by month, owner, territory, etc.





Click once more to pull up the detailed report, in this example sorted by Owner.

Owner: Allie Bellew													
Actual Revenue: \$71,421,342.00													
Actual Revenue: \$71,421,342.00													
Estimated Revenue: \$82,195,000.00													
Topic	Potential Customer	Owner	City	State / Province	Territory	Category	Industry	Actual Revenue	Base Actual Revenue	Est. Revenue	Base Est. Revenue	Status	Close Date
Computers	The Phone Company	Allie Bellew	Clinton	CO				\$ 15,250,000.00	\$ 15,250,000.00	\$ 15,136,000.00	\$ 15,136,000.00	Won	4/14/2014
Audio	Litware	Allie Bellew	Dallas	TX				\$6,126,000.00	\$6,126,000.00	\$6,126,000.00	\$6,126,000.00	Won	8/12/2014
Home Appliances	Litware	Allie Bellew	Dallas	TX				\$4,880,000.00	\$4,880,000.00	\$6,880,000.00	\$6,880,000.00	Won	8/8/2014
Personal Electronics	Proseware, Inc.	Allie Bellew	Port Orchard	NC				\$4,300,000.00	\$4,300,000.00	\$4,300,000.00	\$4,300,000.00	Won	7/1/2014
Audio	Fourth Coffee	Allie Bellew	Bogota			Food and Tobacco Processing		\$4,140,000.00	\$4,140,000.00	\$4,140,000.00	\$4,140,000.00	Won	9/23/2014
Video	Humongous Insurance	Allie Bellew	Madison	IL				\$3,465,000.00	\$3,465,000.00	\$3,465,000.00	\$3,465,000.00	Won	7/26/2014
Personal Audio	Blue Yonder Airlines	Allie Bellew	Sydney			Transportation		\$3,250,000.00	\$3,250,000.00	\$3,230,000.00	\$3,230,000.00	Won	9/9/2014
Computers	Litware	Allie Bellew	Dallas	TX				\$3,250,000.00	\$3,250,000.00	\$3,230,000.00	\$3,230,000.00	Won	9/9/2014
Personal Electronics	Litware	Allie Bellew	Dallas	TX				\$3,226,000.00	\$3,226,000.00	\$3,226,000.00	\$3,226,000.00	Won	7/21/2014
Personal Electronics	The Phone Company	Allie Bellew	Clinton	CO				\$3,150,000.00	\$3,150,000.00	\$3,140,000.00	\$3,140,000.00	Won	8/13/2014
Video	Litware	Allie Bellew	Dallas	TX				\$3,100,000.00	\$3,100,000.00	\$3,136,000.00	\$3,136,000.00	Won	4/10/2014
Video	Blue Yonder Airlines	Allie Bellew	Sydney			Transportation		\$2,150,000.00	\$2,150,000.00	\$2,136,000.00	\$2,136,000.00	Won	8/6/2014
They sell many of the same items that we do - need to follow up	Humongous Insurance	Allie Bellew	Madison	IL				\$2,150,000.00	\$2,150,000.00	\$0.00	\$0.00	Won	9/29/2014

### Conclusion

I hope you found Microsoft Dynamics 365 101: Basics for Sales Managers valuable, and it gets you on the way to making your team more productive and successful. There's a lot more to learn. Stay tuned for future Dyn365Pros E-books, webinars, videos and blogs.

### Contact Information

For more information or help, contact [Dyn365Pros](http://Dyn365Pros.com):

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