



# Sales Module Training

DYNAMICS 365 BUSINESS CENTRAL



**Qualiopi**   
processus certifié

 RÉPUBLIQUE FRANÇAISE

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## The training center

SBSI Consulting is a Microsoft partner on the Dynamics 365 Business Central solution. Its core business is the integration of the enterprise solution and the training of employees on the various modules.

### Certification

Since February 2022, the training centre has been Qualiopi certified under the title “training actions”, which allows you to have your training funded by your OPCO. We can help you establish your administrative file with the latter.

# Training

**Theme:** Manage the company's sales process.

**Audience:** Sales, Sales Administrator, Sales Manager.

**Duration:** 1 day (this duration is adapted according to the client in order to provide tailor-made training).

## Objectives

- Manage new customers
- Execute and follow the Company Sales process: quotes, orders, deliveries, invoicing, returns.
- Manage recurring sales and purchases.
- Process sales returns and cancellations.
- Use open controls.
- Manage forecasts.

## Content

- Preamble: Prior learning assessment (5 min). Round table to learn each participant's skills (15 min).
- **New Customer Registration:** Create a customer record for each customer you sell items to.
- **Creation of quotations:** Create a quotation in which to offer you goods under negotiable conditions before converting the quotation into sales invoice.
- **Sales Billing:** Create a sales invoice to record your agreement with a customer to sell goods under certain delivery and payment conditions.
- **Product sales:** Process a sales order that involves a partial shipment or a direct shipment.
- **Sales Validation:** Understand what happens when you publish sales documents.
- **Printing the Pick List:** Prepare for pick for shipping.
- Creation of recurring sales and purchase lines: Configure the standard sales or purchase lines that you can quickly insert in the documents, for example, for recurring replenishment orders.
- **Direct deliveries:** Link a sales order to a purchase order to sell an item that will be delivered directly by your supplier to your customer.
- **Calculation of delivery promise dates:** Inform your customers of the delivery dates by calculating either the simulation date or the date available for sale.
- **Creating Special Orders:** Have a catalogue item shipped to your warehouse by a supplier so that it can be shipped to your customer.
- **Correction or cancellation of unpaid sales invoices:** Perform an action on a registered unpaid sales invoice to automatically create a credit note and either cancel the sales invoice or recreate it so that you can make corrections.
- **Processing sales returns or cancellations:** Create a sales credit note to refund a specific validated sales invoice to indicate the products returned by the customer and the payment amount you refund.

## Sales Module Training

- **Using Open Sales Orders:** Manage your customers' commitment to purchase large quantities delivered in multiple shipments over a period of time.
- **Sale of items to assemble for order:** Sell assembly elements that are not currently available by creating an associated assembly order to provide the total or partial quantity of the sale order.
- **Bundling Delivery Orders on a Single Invoice:** Bill a customer once for multiple deliveries by combining shipments on a single invoice.
- **Create a forecast:** Record your quotes for future sales, specified by item and period, so that they function primarily as input to production planning.
- **Merge Duplicate Record:** Resolve confusion when two or more records exist for the same client.
- Practical exercises.
- Questions / answers (15 min).

### Followed of actions after training

- Tracking points in an Excel file.
- Periodic meetings.
- Satisfaction questionnaire.

## Practical informations

**Prerequisites:** No prerequisites are required to access the training provided.

**Duration:** 3 to 5 days on average, duration adaptable according to your needs in order to offer you a tailor-made training.

**Delay:** the delay is approximately one month, according to our schedule, between the request and the start of the training.

**Price:** the daily rate of a training is 700€ excl. \*

*\*You can have your training funded by your OPCO. We can help you establish your administrative file with it.*

**Location:** The training location according to your need:

- In your business.
- In our training room: 10 avenue du Gretay, 35310 MORDELLES.
- Remotely via videoconferencing.

**Methods employed:** They differ according to the type of training:

- On-site: Computer software (ERP), video projector, Microsoft documentation, training plan, e-learning platform.
- Distance: Computer software (ERP), Microsoft Teams software, Microsoft documentation, training plan, e-learning platform.

**Evaluation methods:** Exercises, quizzes and questionnaires are given throughout the training to assess the level of each person trained.

**Accessibility:** We offer training that can be accessible to people with disabilities.

For our distance training, we will do everything necessary to put in place the available technical means adaptable to our structure and your needs.

Regarding the pedagogical means, we will adapt to your request by setting up sessions and a duration adapted in individual sessions or in small group of people with similar needs.

On this site, you will find a whole list of specialized structures and professionals involved in the disability field [Disability Accessibility - SBSI Consulting](#).

## Contact



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