

“Bpm’online sales functionality for end-users” Training Program

Target Audience: This training is designed for new end-users of the bpm’online sales product.

Summary: Participants will obtain basic knowledge of the functionality, processes and tools in bpm’online sales.

Time: The training consists of two 4.5 hour sessions conducted over 2 days.

Training program

Time	Subject
Day 1	
11:00 – 11:15	Introduction to bpm’online sales. Complete sales process management from lead to account.
11:15 – 11:45	Introduction to the bpm’online interface and terminology <ul style="list-style-type: none"> • Bpm’online Academy. How to search the Academy.
11:45 – 12:20	360° Customer view. Single Contact and Account database. <ul style="list-style-type: none"> • Managing client/partner/competitor data in the “Account” section • Managing contacts and employee data in the “Contact” section
12:20 – 1:00	Database management <ul style="list-style-type: none"> • Duplicate search and merging • Address search via OpenStreetMap. • Setup and synchronization with Google Contacts (overview) • Exchange contact synchronization (overview) • Export into Excel Section Page list setup
1:00 – 2:00	Organizing and searching for data in the system <ul style="list-style-type: none"> • Filtration types: quick, standard, advanced • Creating custom folders and tags • Adding aggregate columns onto the Section page • Command line use and setup • Building public and private dashboards • Drill-down in dashboards
2:00 – 2:50	Communication options and task management <ul style="list-style-type: none"> • Calendar management (tasks, visits) • Synchronization with Google Calendar and MS Exchange • Email Synchronization • Telephony Integration • Notification Center • Corporate Social Feed (ESN) • Feed channel setup
2:50 – 3:20	Product Catalog Management <ul style="list-style-type: none"> • Product categorization • Maintaining multiple price lists • Stock management • Product catalog in Orders and Invoices • Multilevel product catalog and faceted product search
3:20 – 3:30	Knowledge Base

Time	Subject
Day 2	
11:00 – 11:40	Lead Management <ul style="list-style-type: none"> • Bpm'online lead management philosophy • Lead registration. Different methods of filling a lead database. • The lead management business process
11:40 – 12:40	Opportunity Management <ul style="list-style-type: none"> • Opportunity stage definitions • Creating sales teams and contact lists • Entering and tracking sales tactics. Competitors. • Opportunity History • "Corporate sales" out-of-the-box business process • Analyzing sales representative effectiveness Forecasting and Planning
12:40 – 1:40	Orders and Invoices <ul style="list-style-type: none"> • Creating and using Orders for long and short sales processes' • Installment plans and templates Approval Process
1:40 – 2:00	Contracts and Documents <ul style="list-style-type: none"> • Contract section: additional agreements and specifications • Creating Contracts • Parent and sub contracts • Document control
2:00 – 2:30	Field Sales <ul style="list-style-type: none"> • Site visit planning – field force in bpm'online sales • Field Sales rules • bpm'online sales mobile application
2:30-2:40	Project Management <ul style="list-style-type: none"> • Section overview • Structure and specifics • Managing project resources, completion rates
2:40 – 3:30	System Designer <ul style="list-style-type: none"> • Changing colour schemes and logos • Universal Excel import • Adding new sections, fields, and details • Mobile application setup • User management • Using business processes • Printable forms in MS Word
3:30 – 3:40	Bpm'online Academy <ul style="list-style-type: none"> • Video trainings • Documentation • Testing and Certification • News Feed