



Business Central Relationship Management - Pro Training

Course Description

Managing customer relationships shouldn't live in spreadsheets, inboxes, or someone's memory. In this hands-on bootcamp, you'll learn how to fully leverage the Relationship Management module in Microsoft Dynamics 365 Business Central to organize contacts, track interactions, manage opportunities, and run targeted sales and marketing activities—all in one place.

This course goes far beyond surface-level navigation. You'll walk through real-world scenarios that show how Relationship Management supports the entire customer lifecycle, from first touch to closed deal and ongoing engagement. By the end of the session, you'll understand not just *how* the tools work, but *why* and *when* to use them to drive better sales execution and customer visibility.

This course is designed for Business Central users who want to unlock the full potential of CRM features in Business Central.

Learning Objectives:

- Learn how to leverage Business Central's built-in tools to manage customer data, track interactions, and streamline workflows for better relationship management.
- Master tracking sales opportunities, managing the pipeline, and using real-world strategies to enhance customer engagement and conversions.
- Discover how to analyze customer data using Business Central's reporting features to make informed business decisions.
- Apply your knowledge through guided exercises and practical scenarios that build confidence in using Business Central's CRM features.

Additional Details:

Format: Virtual delivery for up to 5 users, with session recording provided

Course Level: Beginner to Intermediate

Skills Prerequisites: Familiarity with Business Central navigation. Some exposure to business operations or functional modules (e.g., finance, sales, or inventory) is recommended.

Typical Attendees: This course is ideal for ERP users, Business Central consultants, finance and operations leads, and team members looking to enhance their efficiency using CRM features built directly into the Microsoft ecosystem.