



**320 Carleton Avenue
Suite 6200
Central Islip, NY 11722
631-665-2050
www.synergyresources.net**

**[Click here to view
all of our Workshops](#)**

SYNERGY VISUAL TRAINING

BASIC OVERVIEW: SALES CYCLE

TRAINING TOPIC:

Your business's Customer Service process involves a cycle of activities. This team typically ensures that all customer quote requests for goods or services are responded to swiftly and that the subsequent purchase of those goods or services are processed quickly. The team also addresses customer returns when needed and works to handle these situations expeditiously. This training program is focused on providing existing employees with a "refresher" course and new employees with an overview of how to execute the complete Sales Cycle.

TRAINING DESCRIPTION:

This 2-part session will cover core functionality related to the entire Sales Cycle. Participants will walk through the creation of customers, estimates and quotes, customer orders, shipping and customer returns (RMA's). The training program will also address how to perform customer inquiries and view critical reports related to backlog, shipments and returns. Each session will run for 3 to 4 hours depending on questions and number of attendees.

WHO SHOULD ATTEND:

Newly hired Sales or Customer Service Managers, Supervisors, employees in a Customer Service role and other employees that would benefit from a refresher course.

LEARNING OBJECTIVES:

Upon completion of this workshop attendees will understand how to execute an entire Sales Cycle in their VISUAL ERP system.

TRAINING PREREQUISITE:

This is a hands-on, instructor led session. Attendees should be familiar with the information in the Infor VISUAL Concepts and Common Features Guide. Attendees must also have security rights and access to a recent copy of a restored test database.