



M3 v13 Configuring and Using Customer Lifecycle Management (CLM)

This course covers hands-on training to support the configuration of Infor M3 CLM, including the use of mashups.

Course duration

24

Prerequisite knowledge

To optimize your learning experience, Infor recommends that you have a basic understanding of the business processes in Infor M3 prior to taking this course.

Course agenda

The agenda below details the contents of this course, including lesson-level learning objectives and supporting objectives.

Lesson	Lesson title	Learning objectives
	Course overview	Review course expectations.
1	Infor M3 Customer Lifecycle Management (CLM) overview	<p>Describe the key features of Infor M3 Customer Lifecycle Management (CLM).</p> <ul style="list-style-type: none">• Describe the background of Infor M3 CLM.• Describe the business benefits of Infor M3 CLM.• Explain how to set up basic sales data.• Explain how to set up basic customer data.• Explain how to subscribe to an account.
2	Infor M3 BE data import	<p>Describe the key concepts of Infor M3 Business Engine (BE) data import.</p> <ul style="list-style-type: none">• Explain the connection with Infor M3 BE.

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		<ul style="list-style-type: none"> • Describe integration metadata. • Describe how to import and update data.
3	Sales process - account management	<p>Describe the key concepts of account management.</p> <ul style="list-style-type: none"> • Describe how to set up and manage account and contact information. • Describe how to create sales activities and sales opportunities.
4	Sales process – sales activity planning	<p>Explain the key concepts of sales activity planning.</p> <ul style="list-style-type: none"> • Explain the features of My Calendar. • Explain how to integrate Infor M3 CLM with Microsoft® Outlook®.
5	Sales process – opportunity/pipeline management	<p>Describe the key concepts of opportunity/pipeline management.</p> <ul style="list-style-type: none"> • Describe how to perform opportunity and pipeline management. • Explain how to create quotations from an opportunity. • Explain how to create quotations directly in Infor M3 CLM.
6	Infor M3 CLM for equipment	<p>Describe the key concepts of equipment-related functionality in Infor M3 CLM.</p> <ul style="list-style-type: none"> • Describe how to create an equipment code. • Describe how to create a sales quote. • Describe how to create a rental quote.
7	Sales process – follow-up	<p>Describe the key concepts of sales processing as it relates to follow-up and reporting.</p> <ul style="list-style-type: none"> • Explain how to search for information in Infor M3 CLM using the Search function. • Explain how to search for information in Infor M3 CLM using the Selection Tool. • Describe how to export data to Microsoft® Excel®
8	Navigating common Infor M3 CLM functions	<p>Describe key concepts of regularly used functions in Infor M3 CLM.</p>

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		<ul style="list-style-type: none"> • Describe how to navigate My Competitors. • Describe how to navigate General Objects. • Describe how to navigate Projects. • Describe how to navigate Issues. • Describe how to navigate Sales activity. • Describe how to navigate Budgets.
9	Sales process – lead/demand	<p>Describe how to set up and manage campaigns in Infor M3 CLM Campaign Management.</p> <ul style="list-style-type: none"> • Define a campaign in Infor M3 CLM Campaign Management. • Describe how to create a campaign in Infor M3 CLM Campaign Management. • Describe how to create campaign parts.
10	Advanced Infor M3 CLM setup	<p>Describe the key concepts of advanced Infor M3 CLM set up.</p> <ul style="list-style-type: none"> • Describe how to edit Infor M3 CLM dialogs. • Describe how to edit Infor M3 CLM navigation elements. • Describe how to create a checklist template.
Course summary		Debrief course.