

MB-210T01: Microsoft Dynamics 365 Sales

OBJECTIVE

Microsoft Dynamics 365 for Sales is an end-to-end application to manage the handling of customers and potential customers; it assists with tracking data against sales goals, automating best practices, learning from data, and more.

Our team of globally recognized experts take students step by step, from lead, to opportunity, to closed deal. Using the application's available automation and customization options, students will learn how to enable sales staff to be their most productive selves.

COURSE TOPICS

Module 1: Sales Overview

In this module students will learn the basics of sales in Dynamics 365. They will install and configure the application, as well as learn about security roles, key terms, and the data model.

Lessons

- Sales overview
- Configuring Sales
- Module summary

After completing this module, students will be able to:

- Install and configure the sales application
- Identify common sales scenarios

Module 2: Working with Opportunities

In this module students will learn how to manage customer data records, use built-in sales tools, and take a lead to an opportunity.

Lessons

- Manage customers
- Working with opportunities
- Embedded intelligence
- Playbooks
- Integrated sales tools
- Module summary

After completing this module, students will be able to:

- Create customer records
- Use sales tooling

Module 3: Quotes to Orders

In this module students will learn how to use quotes and orders to further use Dynamics 365 for Sales to manage sales opportunities to closed deals.

Lessons

- Order processing overview
- Manage product catalog
- Create and manage quotes
- Create and manage orders and invoices
- Module summary

After completing this module, students will be able to:

- Create and use the product catalog
- Add quotes to opportunities
- Complete a sale with an order

Module 4: Sales Analytics and Insights

In this module students will learn how to create and use goals, integrate with PowerBI, and enable Sales AI.

Lessons

- Overview
- Power BI
- AI for Sales
- Modules summary

After completing this module, students will be able to:

- Create and use goals
- Integrate with PowerBI
- Enable Sales AI functionality

PREREQUISITES

Familiarity of business applications and the desire to customize and implement them for business.

TRAINING APPROACH

This course includes lectures, course notes, exercises and hands-on practice.

COURSE DURATION

8 Hours (1 day)

Time: 9:00am to 6:00pm

Lunch Time: 1:00pm to 2:00pm

CERTIFICATION COMPLETION

A certificate of completion is provided for all trainees attending the course.