

Microsoft Dynamics 365 Sales (MB-210T01)

COURSE OVERVIEW

Microsoft Dynamics 365 Sales is an end-to-end application to manage the handling of customers and potential customers. Using Dynamics 365 Sales, organizations can track data against sales goals, automate best practices, learn from data, and more. Join our team of globally recognized experts as they take you step by step from lead to opportunity to closed deal. Using the application's available automation and customization options you will learn how to enable sales staff to be their most productive selves.

WHO WILL BENEFIT FROM THIS COURSE?

A Dynamics 365 Functional Consultant is responsible for performing discovery, capturing requirements, engaging subject matter experts and stakeholders, translating requirements, and configuring the solution and applications. The Functional Consultant implements a solution using out of the box capabilities, codeless extensibility, application and service integrations.

PREREQUISITES

Students should be familiar with Dynamics 365 model-driven applications and the Power Platform. Students should also be familiar with the sales process and sales organizations. No certifications are required as a pre-requisite for this course, but PL-200T00 (Power Platform Functional Consultant) is recommended as a supplement to this course.

COURSE OBJECTIVES

Students will learn to:

- Set up and configure Dynamics 365 Sales
- Manage leads with Dynamics 365 Sales
- Manage opportunities with Dynamics 365 Sales
- Work with Dynamics 365 Sales insights
- Manage and organize your product catalog with Dynamics 365 Sales
- Process sales orders with Dynamics 365 Sales
- Manage relationships with relationship selling in Dynamics 365 Sales
- Analyze Dynamics 365 sales data
- Define and track individual goals in Dynamics 365 Sales and Customer Service
- Use goal metrics in Dynamics 365 Sales and Customer Service

COURSE OUTLINE

Module 1: Set up and configure Dynamics 365 Sales

- Learn about the key features of Dynamics 365 Sales and how it can help your organization.
- Configure key settings that organizations should customize when setting up the application.
- Set up the included security roles for sales users.



Module 2: Manage leads with Dynamics 365 Sales

- Examine the lead qualification process in Dynamics 365 from beginning to end
- Identify the different options that are available for creating and defining leads
- Use business process flows to manage the lead lifecycle
- Qualify and disqualify leads

Module 3: Manage opportunities with Dynamics 365 Sales

- Identify scenarios where opportunities can be used
- Create and define opportunities
- Work with related opportunity records
- Manage an opportunity throughout its lifecycle

Module 4: Work with Dynamics 365 Sales insights

- Configure and work with Dynamics 365 Sales Insights data to gain insights to your customers. This learning path covers configuration and working with Sales Insights.

Module 5: Manage and organize your product catalog with Dynamics 365 Sales

- Set up unit groups to help control how products are sold
- Create product family hierarchies that include product bundles and individual products
- Set up product pricing data by creating price lists and price list items
- Use discount lists to provide volume discount pricing

Module 6: Process sales orders with Dynamics 365 Sales

- Define quote records for opportunity records
- Work a quote through its entire lifecycle
- Add and revise quote product line items
- Deliver quotes to customers

Module 7: Manage relationships with relationship selling in Dynamics 365 Sales

- Discover best practices
- Work with sales playbooks
- Manage relationship health with Sales Insights
- Recognize features of Sales Navigator

Module 8: Analyze Dynamics 365 sales data

- Review analytical options
- Describe searching tools
- Utilize Power BI to view data
- Analyze data

Module 9: Define and track individual goals in Dynamics 365 Sales and Customer Service

- Create and manage individual goals
- Use Parent and Child Goals
- Monitor goal progress

Module 10: Use goal metrics in Dynamics 365 Sales and Customer Service

- Determine with metrics are needed to build efficient customer service goals
- Modify Fiscal Year settings to align goal progress
- Define Goal Metrics for an Organization
- Create custom Roll-up columns and Queries

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