Enterprise Computing Solutions - Education Services

TRAINING OFFERING

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MB-210T01: Microsoft Dynamics 365 Sales

CODE:	LENGTH:	PRICE:
MCS_MB-210T01	16 Hours (2 days)	€1,650.00

Description

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.

Objectives

- Install and configure the application
- Identify common sales scenarios
- Complete a sales cycle
- Configure product catalog
- Manage customer records
- Utilize analytics tools with customer data

Audience

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

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

Programme

Module 1: Configure Dynamics 365 Sales
In this module, we will learn about configuring the sales application to fit an organization's unique requirements.
Lessons
- Configure organization and management settings
Lab : Lab 1.1: Validate lab environment
After completing this module, you will be able to:
- Install and configure the sales application.
- Identify common sales scenarios.
Module 2: Manage leads and opportunities with Dynamics 365 Sales
In this module, you will learn how to manage customer data records, use built-in sales tools, and take a lead through the lead lifecycle.
Lessons
- Manage leads with Dynamics 365 Sales
- Manage opportunities with Dynamics 365 Sales
Lab : Lab 2.1: Manage customers
After completing this module, you will be able to:
- Create customer records.
- Use sales tooling.
- Create leads and opportunities.
Module 3: Manage orders and the product catalog with Dynamics 365 Sales
In this module, we will learn how to use quotes and orders to further use Dynamics 365 Sales to manage your sales opportunities and turn them into closed deals.

Lessons
- Manage and organize your product catalog with Dynamics 365 Sales
- Process sales orders with Dynamics 365 Sales
After completing this module, you will be able to:
- Create and use the product catalog.
- Add quotes to opportunities.
- Complete a sale with an order.
Module 4: Manage goals with Dynamics 365 Sales
In this module, we will learn how to manage goals to track the success of your sales organization and gather key metrics about sales performance.
Lessons
- Define and track individual goals with Dynamics 365 Sales
- Use goal metrics in Dynamics 365 Sales
After completing this module, you will be able to:
- Use rollup columns to define sales metrics.
- Track individual goals for sales and teams.
Module 5: Analyze Dynamics 365 Sales data
In this module, we will review analytical options, describe search tools, and use Power BI to view and analyze sales data.
Lessons
- Analyze data in Dynamics 365 Sales
- Analyze data with Power BI
After completing this module, you will be able to:
- Analyze sales data using out-of-the-box Dynamics 365 tools
- Configure charts and dashboards to view sales data
- Use Power BI and Power BI template apps to analyze data
Module 6: Work with Dynamics 365 Sales Insights
In this module, you will learn about the free and premium features of Dynamics 365 Sales Insights, and how it can empower salespeople to form closer relationships with their customers and close sales faster.
Lessons
- Configure Sales Insights
After completing this module, you will be able to:
- Set up and configure Sales Insights
- Work with Assistant studio
- Configure productivity intelligence
- Configure Connection insights
- Configure predictive models
Module 7: Create surveys with Dynamics 365 Customer Voice
In this module, students will learn about Dynamics 365 Customer Voice, a powerful tool for gathering and analyzing customer sentiment.
Lessons
- Create a survey project with Dynamics 365 Customer Voice
- Create surveys with Dynamics 365 Customer Voice
- Send Dynamics 365 Customer Voice surveys
After completing this module, students will be able to:
- Set up survey projects to organize and create surveys
- Create a survey with variables and entities
- Send Dynamics 365 Customer Voice surveys using multiple modalities

Session Dates

On request. Please contact us

Additional Information

This training is also available as onsite training. Please contact us to find out more.