Enterprise Computing Solutions - Education Services

TRAINING OFFERING

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MB-210T01: Microsoft Dynamics 365 Sales

Kod:	Czas trwania:	Cena netto:
MCS_MB-210T01	16 Hours (2 days)	Request Price

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.

Uczestnicy

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.

Wymagania wstępne

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.

Program szkolenia

Module 1: Set up and configure Dynamics 365 Sales
Dynamics 365 Sales helps salespeople build strong relationships with their customers, act based on insights, and close sales faster. It also helps to track accounts and contacts, nurture sales from lead to order, and create sales collateral. This module introduces the Dynamics 365 Sales application and explains how to set up the application.

In this module, you will:

- 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
The lead management capabilities in Microsoft Dynamics 365 let you connect with your customers in a whole new way. This module provides an overview of what leads are, and describes the different options for creating leads, managing them, and working with them throughout their lifecycle. It also provides information about qualifying and disqualifying leads. The more leads you have, the greater your chances of getting opportunities and successfully closing deals.

In this module, you will:

- 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.

The opportunity management capabilities in Microsoft Dynamics 365 make it easy to manage opportunities and convert more leads. In this module, you'll learn how and when opportunities are used and managed in Dynamics 365. You'll also learn about the options for creating opportunities, their relationships with other records, and how to manage them throughout their lifecycle. By providing a complete view of the customer, Dynamics 365 helps you win more deals.

In this module, you will:

- 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.
Microsoft Dynamics 365 helps organize and manage even the most complex product catalog to support your customers in customer engagement scenarios (for example, sales and column service). In this module, you'll learn how to define products, families, and bundles, take advantage of product properties, and define price lists. You'll also learn about pricing options for increased consistency and efficiency.

In this module, you will:

- 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

Terminy

Na żądanie. Prosimy o kontakt

Dodatkowe informacje

Jeśli interesują Cię inne szkolenia tego producenta - skontaktuj się z nami.