



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.

Audience Profile

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.

Skills Gained

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

Prerequisites

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

Duration: 12 hrs (4 x 3hrs)

Course Outline

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, students 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, students 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 catalogue with Dynamics 365 Sales
- Process sales orders with Dynamics 365 Sales

After completing this module, students will be able to:

- Create and use the product catalogue.
- 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, students 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 analyse sales data.

Lessons

- Analyze data in Dynamics 365 Sales
- Analyze data with Power BI

After completing this module, students 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 analyse 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, students 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 analysing 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