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Learning Style: Virtual Classroom
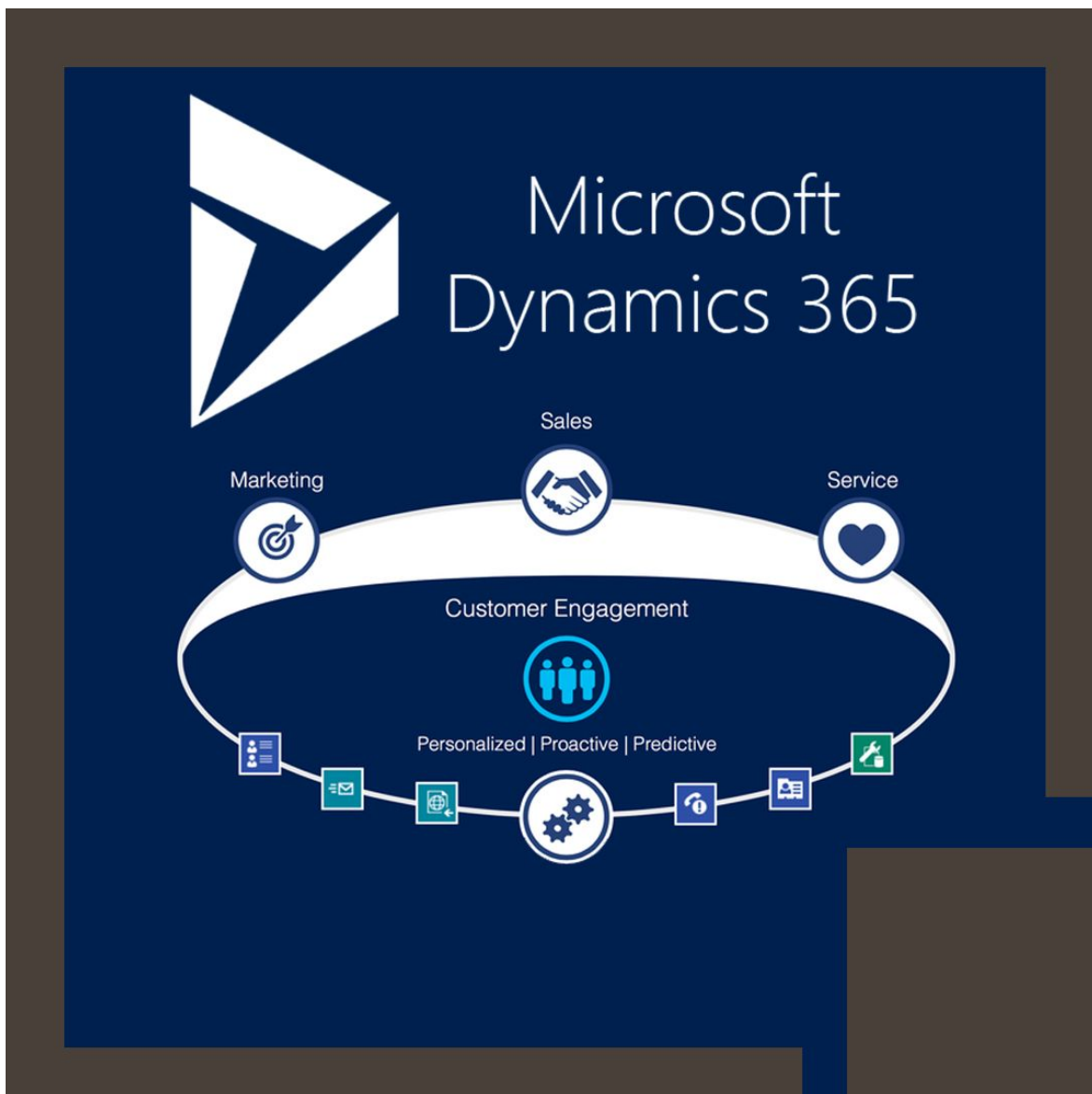
Provider: Microsoft

Difficulty: Intermediate

Course Duration: 2 Days

Next Course Date: September 6, 2024

Microsoft Dynamics 365 Sales (MB-210T01)

If you enroll in this course at the listed price, you receive a** Free Official Exam Voucher **for the MB-210 Exam. This course does not include Exam Voucher if enrolled within the Master Subscription, however, you can request to purchase the Official Exam Voucher separately.

About this Course:

This intermediate-level course is specifically designed for professionals striving to pursue a career as the Microsoft Dynamics Functional Consultant. Microsoft Dynamics 365 has multiple applications in the niche of business operations and is specifically designed to streamline sales operations and processes. Features such as End-to-End Application Management allows businesses to handle the records of customers & potential customers efficiently. Besides this, Dynamics 365 also provides Data Tracking Functionalities and Service Automation Solutions.

This course covers the key concepts of Applications Installation & Configuration, Sales Scenarios Identification, Sales Cycle Progress Evaluation, Customer Record Management, Product Catalog Configuration, and Analytical Tools Utilization. Through this course, professionals will get to understand the roles and responsibilities of a Functional Consultant. In businesses, a Functional Consultant plays a key role in snagging stakeholders, understanding client requirements, and configuring applications & solutions.

Course Objectives:

The core objective of this course is to help professionals develop a better understanding and sound knowledge of the following key concepts:

- Configuration and Installation of Applications
- Common Sales Scenarios Identification
- Sales Cycle Completion
- Product Catalog Configuration
- Customer Records Management
- Analytical Tools Utilization for Customer Data

Audience:

This course is tailored for the following group of professionals and interested candidates:

- Dynamics 365 Customer Engagement Functional Consultant
- IT Support Officers & Professionals

Prerequisites:

Professionals planning to enroll in the Dynamics 365 for Customer Engagement for Sales (MB-210T01) course must have a fundamental knowledge of Business Application and their Implementation Techniques

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, 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

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