

Dynamics 365 for customer engagement for sales

Learn via: **Classroom / Virtual Classroom**

Duration: **1 Day**

Overview

Overview

Microsoft Dynamics 365 for Sales is an end-to-end application to manage the handling of customers and potential customers; tracking data against sales goals, automating your best practices, learning from your 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 Customer Engagement 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

Prerequisites

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

What You Will Learn

Delegates will learn how to

- 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

Outline

Outline

Module 1: Sales Overview

In this module you will learn the basics of sales in Dynamics 365. We will install and configure the application as well as learn about security roles, key terms and the data model.

Lessons

- Sales overview
- Configuring Sales
- Module summary

After completing this module, you will be able to:

- Install and configure the sales application.
- Identify common sales scenarios.

Module 2: Working with Opportunities

In this module you will learn how to manage customer data records, use built in sales tools and take a lead to an opportunity.

Lessons

- Manage customers
- Working with opportunities
- Embedded intelligence
- Playbooks
- Integrated sales tools
- Module summary

After completing this module, you will be able to:

- Create customer records.
- Use sales tooling.

Module 3: Quotes to Orders

In this module you will learn how to use quotes and orders to further use Dynamics 365 for Sales to manage your sales opportunities to closed deals.

Lessons

- Order processing overview
- Manage product catalog
- Create and manage quotes
- Create and manage orders and invoices
- Module summary

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: Sales Analytics and Insights

In this module you will learn how to create and use goals; integrate with PowerBI and enable Sales AI.

Lessons

- Overview
- Power BI
- AI for Sales
- Modules summary

After completing this module, you will be able to:

- Create and use goals.
- Integrate with PowerBI.
- Enable Sales AI functionality.