

MB-210: Microsoft Dynamics 365 Sales

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

Create and configure sales visualizations

After completing this module, you will be able to:

Install and configure the sales application.

Identify common sales scenarios.

Module 2: Manage customers, leads, and opportunities

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 customers using accounts and contacts

Manage leads

Manage opportunities

After completing this module, you will be able to:

Create customer records.

Use sales tooling.

Create leads and opportunities.

Module 3: Process sales orders

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 quotes, orders, and invoices

Manage and organize the product catalog

Manage forecasting

Configure playbooks

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: Integrate components with Dynamics 365 Sales

In this module, we will learn how to use sales analytics tools to empower the sales team.

Lessons

Leverage Embedded Intelligence in Dynamics 365 Sales

Manage relationships with social selling

After completing this module, you will be able to:

Use Embedded Intelligence tools.

Manage relationships using social selling tools.