

MB-210T01: Microsoft Dynamics 365 Sales

Duration: 16 Hours (2 Days)

Overview

The MB-210T01: Microsoft Dynamics 365 Sales course is designed to equip learners with the skills and knowledge to configure, manage, and use Dynamics 365 Sales for their sales operations. Through a series of modules, participants will learn to Configure organizational settings, Manage customer relationships, Handle leads and opportunities, Process orders, and Analyze sales data. Learners will gain hands-on experience in Setting up Dynamics 365 Sales, Creating sales visualizations, Managing the product catalog, Processing sales orders, and Employing forecasting techniques. They will also explore how to set and track sales goals, integrate with Dynamics 365 components, leverage sales insights, and utilize Dynamics 365 Customer Voice to create and send surveys. By the end of the course, participants will have a comprehensive understanding of how to effectively use Dynamics 365 Sales to improve their sales processes, engage with customers more effectively, and make data-driven decisions to drive sales performance. This course is essential for sales professionals and CRM administrators looking to maximize their use of Dynamics 365 Sales to enhance their sales strategies and outcomes.

Audience Profile

The MB-210T01 course equips professionals with skills to configure and use Microsoft Dynamics 365 Sales for optimized customer relations.

- Target Audience for MB-210T01: Microsoft Dynamics 365 Sales:
- Sales Managers and Executives
- CRM System Administrators
- IT Professionals responsible for configuring and managing sales systems
- Sales Operations Specialists
- Business Analysts focusing on sales processes
- Marketing Professionals seeking integration with sales efforts
- Customer Service Managers integrating service with sales processes
- Dynamics 365 Consultants and Functional Consultants
- Professionals looking to learn about Dynamics 365 Sales for career advancement

Course Syllabus

Table of Content:

- By the end of this course, participants will be able to:
- Navigate and utilize the key features of Dynamics 365 Sales.
- Configure organization settings and manage security roles within Dynamics 365 Sales.
- Manage leads and opportunities throughout their lifecycle, from creation to conversion.
- Track and analyze customer interactions to optimize sales efforts.
- Organize and manage product catalogs, sales orders, and invoicing processes.
- Define, track, and forecast sales goals to drive business performance.
- Analyze sales data using dashboards and Power BI for strategic decision-making.
- Enhance seller productivity with Dynamics 365 Sales Insights, Sales Accelerator, and Microsoft Copilot for Sales.
- Create and manage surveys with Dynamics 365 Customer Voice.

- Utilize the Dynamics 365 Sales mobile app for on-the-go sales management.

Learning Path 1: Get Started with Dynamics 365 Sales

Module 1: Introduction to Dynamics 365 Sales

- Navigate throughout the Dynamics 365 Sales app.
- Identify key feature offerings in Dynamics 365 Sales products.
- Manage customers, documentation, and campaigns

Module 2: Configure Organization and Management Settings

- Identify common customization scenarios.
- Understand the model-driven application data model.
- Configure security roles.
- Lab 1.1: Validate Lab Environment

Learning Path 2: Manage Leads and Opportunities in Dynamics 365 Sales

Module 1: Manage Leads with Dynamics 365 Sales

- Identify stages in the lead to opportunity lifecycle.
- Create and manage lead records.
- Use predictive lead scoring to assess the likelihood of converting a lead

Module 2: Manage Opportunities with Dynamics 365 Sales

- Create and define opportunities.
- Manage an opportunity through its lifecycle.
- Leverage the opportunity pipeline view for a complete view of your customer base.

Module 3: Track Customer Interactions with Activities

- Track and manage activities related to your customers.
- View activities in a list, calendar, or Kanban.
- Work with activities directly in the timeline.
- Lab 2.1: Manage Customers
- Demo 2.1: Customize the Sales Process

Learning Path 3: Manage Orders and the Product Catalog with Dynamics 365 Sales

Module 1: Manage and Organize Your Product Catalog with Dynamics 365 Sales

- Configure currency settings.
- Create products and build a product catalog.
- Create price lists and discount lists.

Module 2: Process Sales Orders with Dynamics 365 Sales

- Process sales orders.
- Create quotes personalized with customer information.
- Create and send invoices after an order is complete.
- Lab 3.1: Manage Product Catalog
- Lab 3.2: Build Quotes

- Lab 3.3: Orders and Invoices

Learning Path 4: Manage Goals and Forecasts with Dynamics 365 Sales

Module 1: Define and Track Goals in Dynamics 365 Sales

- Understand individual goals and parent/child goals.
- Configure settings associated with goals, like fiscal year.
- Configure rollout columns to define goal metrics.

Module 2: Manage Forecasting in Dynamics 365 Sales

- Configure a forecast.
- Use forecast templates.
- Use predictive forecasting

Learning Path 5: Analyze Dynamics 365 Sales Data

Module 1: Analyze Data with Dynamics 365 Sales

- Identify the analytical options for displaying sales data and pick the option that fits best for your requirements.
- Configure a dashboard to display sales data in different formats across a single screen.
- Work with Microsoft 365 tools like inline Excel to analyze sales data.

Module 2: Analyze Data with Power BI

- Visualize views with Power BI to create rich visuals for your data.
- Use Power BI templates.
- Describe the benefits of using Power BI over out-of-the-box tools for data analysis and visualization.
- Lab 5.1: Configure a Dashboard

Learning Path 6: Work with Dynamics 365 Sales Insights and the Sales Accelerator

Module 1: Get Started with Dynamics 365 Sales Insights

- Enable various Sales Insights features in the Sales Insights settings area.
- Create Assistant cards using the Assistant studio.
- Configure productivity intelligence features and manage relationship health.

Module 2: Get Started with the Sales Accelerator

- Set up the Sales accelerator.
- Customize the workspace based on individual seller needs.
- Use the work list and sequences to enhance seller productivity.
- Demo 6.1: Sales Insights
- Lab 6.2: Create a Sequence

Learning Path 7: Create Surveys with Dynamics 365 Customer Voice

Module 1: Create a Survey Project

- Understand the purpose of projects in organizing surveys.

- Create a new survey project.

Module 2: Create Surveys with Dynamics 365 Customer Voice

- Create a new survey for gathering customer feedback.
- Build a survey using different question types, satisfaction metrics, and branching logic.
- Customize your survey to match your organization's brand presence.

Module 3: Send Dynamics 365 Customer Voice Surveys

- Send a survey to customers via email or a CSV file.
- Share a survey via a link.
- Share a survey via a QR code.

Learning Path 8: Enhance Seller Productivity by Extending Dynamics 365 Sales

Module 1: Boost Sales Performance with Microsoft Copilot for Sales

- Use Microsoft Copilot for Sales in Outlook to jumpstart email activities.
- Use Microsoft Copilot for Sales to gain insights and action items from sales meetings in Teams.
- Use data from your CRM system in your flow of work without switching applications.

Module 2: Get Started with the Dynamics 365 Sales Mobile App

- Describe the benefits of working on the go with the Dynamics 365 Sales mobile app.
- Download and configure the Dynamics 365 Sales mobile app.
- Navigate through the mobile application to complete daily seller tasks.

Module 3: Use Microsoft 365 Services with Dynamics 365 Sales

- Configure Exchange integration and set up mailboxes.
- Deploy the app for Outlook.
- Manage documents