

KOENIG SOLUTIONS • COURSE OUTLINE

MB-210T01: Microsoft Dynamics 365 Sales

Learn to configure, manage and use Dynamics 365 Sales to handle leads, opportunities, orders and sales data.

2 Days

16 HOURS

19

MODULES

56

TOPICS

9

HANDS-ON ACTIVITIES

COURSE 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.

WHO THIS COURSE IS FOR

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

What You Will Learn

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

COURSE SYLLABUS

19 Modules, 56 Topics

01

Introduction to Dynamics 365 Sales

TOPICS

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

02

Configure Organization and Management Settings

Lab

TOPICS

- Identify common customization scenarios
- Understand the model-driven application data model
- Configure security roles

01

Manage Leads with Dynamics 365 Sales

TOPICS

- 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

02

Manage Opportunities with Dynamics 365 Sales

TOPICS

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

03[Lab](#)[Demo](#)

Track Customer Interactions with Activities

TOPICS

- Track and manage activities related to your customers
- View activities in a list, calendar, or Kanban
- Work with activities directly in the timeline

01

Manage and Organize Your Product Catalog with Dynamics 365 Sales

TOPICS

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

02[3 Labs](#)

Process Sales Orders with Dynamics 365 Sales

TOPICS

- Process sales orders
- Create quotes personalized with customer information
- Create and send invoices after an order is complete

01

Define and Track Goals in Dynamics 365 Sales

TOPICS

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

02

Manage Forecasting in Dynamics 365 Sales

TOPICS

Configure a forecast · Use forecast templates · Use predictive forecasting

01

Analyze Data with Dynamics 365 Sales

TOPICS

- 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

02

Analyze Data with Power BI

Lab

TOPICS

- 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

01

Get Started with Dynamics 365 Sales Insights

TOPICS

- 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

02

Demo

Lab

Get Started with the Sales Accelerator

TOPICS

- Set up the Sales accelerator
- Customize the workspace based on individual seller needs
- Use the work list and sequences to enhance seller productivity

01

Create a Survey Project

TOPICS

- Understand the purpose of projects in organizing surveys
- Create a new survey project

02

Create Surveys with Dynamics 365 Customer Voice

TOPICS

- 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

03

Send Dynamics 365 Customer Voice Surveys

TOPICS

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

01

Boost Sales Performance with Microsoft Copilot for Sales

TOPICS

- 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

02

Get Started with the Dynamics 365 Sales Mobile App

TOPICS

- 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

03

Use Microsoft 365 Services with Dynamics 365 Sales

TOPICS

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

HANDS-ON ACTIVITIES

Practise What You Learn

#	MODULE	ACTIVITY
02	Configure Organization and Management Settings	Lab: Lab 1.1: Validate Lab Environment
03	Track Customer Interactions with Activities	Lab: Lab 2.1: Manage Customers Demo: Demo 2.1: Customize the Sales Process
02	Process Sales Orders with Dynamics 365 Sales	LAB ■ Lab 3.1: Manage Product Catalog ■ Lab 3.2: Build Quotes ■ Lab 3.3: Orders and Invoices
02	Analyze Data with Power BI	Lab: Lab 5.1: Configure a Dashboard
02	Get Started with the Sales Accelerator	Demo: Demo 6.1: Sales Insights Lab: Lab 6.2: Create a Sequence

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

FLEXIBLE DELIVERY

Learn the Way That Suits You

Classroom Training

Live Online Classes (ILO)

Fly-Me-A-Trainer (FMAT)

Flexi (Self-Paced)

1-on-1 Training

Ready to Get Started?

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