

KOENIG SOLUTIONS • COURSE OUTLINE

MB-280T02: Empower Sellers with Dynamics 365 Sales and Microsoft 365 Copilot for Sales

Learn to configure Dynamics 365 Sales and Microsoft 365 Copilot for Sales, from leads and orders to forecasts and analytics.

2 Days

16 HOURS

7

MODULES

21

TOPICS

COURSE OVERVIEW

This course covers Dynamics 365 Sales, including lead and opportunity management, product catalog organization, sales order processing, and key features of Microsoft Copilot for Sales.

WHO THIS COURSE IS FOR

This course is designed for IT or sales professionals who want to learn how to leverage Dynamics 365 Sales and Microsoft Copilot for Sales for their organizations

PREREQUISITES

- Knowledge in basic sales principles
- Familiarity with Dynamics 365 customer experience suite, including Dynamics 365 Sales and Dynamics 365 Customer Insights
- Basic model-driven application configuration experience

LEARNING OBJECTIVES

In this course, students will learn how to configure and leverage Dynamics 365 Sales to set sales teams up for success.

- Configure and leverage Dynamics 365 Sales to set sales teams up for success

7 Modules, 21 Topics

01

Learning Path 1: Get Started with Dynamics 365 Sales

TOPICS

- **Module 1:** Introduction to Dynamics 365 Sales and Microsoft 365 Copilot for Sales
- **Module 2:** Configure organization and management settings
- **Module 3:** Set up and configure supporting applications

02

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

TOPICS

- **Module 1:** Track customer interactions with activities
- **Module 2:** Manage leads with Dynamics 365 Sales
- **Module 3:** Manage opportunities with Dynamics 365 Sales

03

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

TOPICS

- **Module 1:** Manage and organize your product catalog with Dynamics 365 Sales
- **Module 2:** Process sales orders with Dynamics 365 Sales

04

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

TOPICS

- **Module 1:** Define and track goals in Dynamics 365 Sales
- **Module 2:** Manage forecasting in Dynamics 365 Sales

05

Learning Path 5: Work with Dynamics 365 Sales Insights and the Sales Accelerator

TOPICS

- **Module 1:** Work with business process flows
- **Module 2:** Enhance productivity with Dynamics 365 Sales Insights
- **Module 3:** Set up Sales accelerator
- **Module 4:** Create sales sequences and assignment rules
- **Module 5:** Work with segments
- **Module 6:** Engage with customers through text messages

06

Learning Path 6: Analyze Dynamics 365 Sales Data

TOPICS

Module 1: Analyze data in Dynamics 365 Sales · **Module 2:** Analyze data with Power BI

07

Learning Path 7: Enhance Seller Productivity with the Mobile App and Microsoft 365 Copilot for Sales

TOPICS

- **Module 1:** Get started with the Dynamics 365 Sales mobile app
- **Module 2:** Boost sales performance with Microsoft 365 Copilot for Sales
- **Module 3:** Install and deploy Microsoft 365 Copilot for Sales

NOTES

- Lab exercises: Detailed, step-by-step instructions are provided for each lab and presented as part of the UI experience within your lab environment.

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

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Live Online Classes (ILO)

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