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

Course Duration: 2 day (16 hours)

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.

Audience Profile:

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:

Participants should have knowledge in basic sales principles and should be familiar with Dynamics 365 customer experience suite, including Dynamics 365 Sales and Dynamics 365 Customer Insights. They should also have basic model-driven application configuration experience.

Course Objectives:

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

Table of Contents

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

Learning Path 1: Get started with Dynamics 365 Sales

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

Learning Path 2: Manage leads and opportunities in Dynamics 365 Sales

Module 1: Track customer interactions with activities

Module 2: Manage leads with Dynamics 365 Sales

Module 3: Manage opportunities with Dynamics 365 Sales

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

Module 2: Process sales orders with Dynamics 365 Sales

Learning Path 4: Manage goals and forecasts with Dynamics 365 Sales

Module 1: Define and track goals in Dynamics 365 Sales

Module 2: Manage forecasting in Dynamics 365 Sales

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

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

Learning Path 6: Analyze Dynamics 365 Sales data

Module 1: Analyze data in Dynamics 365 Sales

Module 2: Analyze data with Power BI

Learning Path 7: Enhance seller productivity with the mobile app and Microsoft 365 Copilot for Sales

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

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