

MB - 210T01 : Microsoft Dynamics 365 Sales

Course Outline

Module 1: Configure Dynamics 365 Sales

Lessons

- Configure organization and management settings
- **Lab 1.1:** Validate lab environment

Learning Objectives

- Install and configure the sales application.
- Identify common sales scenarios.

Module 2: Manage Leads and Opportunities with Dynamics 365 Sales

Lessons

- Manage leads with Dynamics 365 Sales
- Manage opportunities with Dynamics 365 Sales
- **Lab 2.1:** Manage customers

Learning Objectives

- Create customer records.
- Use sales tooling.
- Create leads and opportunities.

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

Lessons

- Manage and organize your product catalog with Dynamics 365 Sales
- Process sales orders with Dynamics 365 Sales

Learning Objectives

- Create and use the product catalog.
- Add quotes to opportunities.
- Complete a sale with an order.

Module 4: Manage Goals with Dynamics 365 Sales

Lessons

- Define and track individual goals with Dynamics 365 Sales
- Use goal metrics in Dynamics 365 Sales

Learning Objectives

- Use rollup columns to define sales metrics.
- Track individual goals for sales and teams.

Module 5: Analyze Dynamics 365 Sales Data

Lessons

- Analyze data in Dynamics 365 Sales
- Analyze data with Power BI

Learning Objectives

- Analyze sales data using out-of-the-box Dynamics 365 tools.
- Configure charts and dashboards to view sales data.
- Use Power BI and Power BI template apps to analyze data.

Module 6: Work with Dynamics 365 Sales Insights

Lessons

- Configure Sales Insights

Learning Objectives

- Set up and configure Sales Insights.
- Work with Assistant studio.
- Configure productivity intelligence.
- Configure Connection insights.
- Configure predictive models.

Module 7: Create Surveys with Dynamics 365 Customer Voice

Lessons

- Create a survey project with Dynamics 365 Customer Voice
- Create surveys with Dynamics 365 Customer Voice
- Send Dynamics 365 Customer Voice surveys

Learning Objectives

- Set up survey projects to organize and create surveys.
- Create a survey with variables and entities.
- Send Dynamics 365 Customer Voice surveys using multiple modalities.