# Dynamics 365 for Customer Engagement for Sales

## Duration: 2 Days    Course Code: M-MB210

## Overview:

Microsoft Dynamics 365 Sales is an end-to-end application to manage the handling of customers and potential customers. Using Dynamics 365 Sales, organizations can track data against sales goals, automate best practices, learn from data, and more.Join our team of globally recognized experts as they take you step by step from lead to opportunity to closed deal.  Using the application's available automation and customization options you will learn how to enable sales staff to be their most productive selves.

## Target Audience:

A Dynamics 365 Functional Consultant is responsible for performing discovery, capturing requirements, engaging subject matter experts and stakeholders, translating requirements, and configuring the solution and applications. The Functional Consultant implements a solution using out of the box capabilities, codeless extensibility, application and service integrations.

## Prerequisites:

- Familiarity of business applications and the desire to customize and implement them for your business.

## Content:

**Set up and configure Dynamics 365 Sales**

- Introduction
- Set up and configure the application
- Use customization options
- Set up security roles
- Check your knowledge
- Summary

**Manage leads with Dynamics 365 Sales**

- Dynamics 365 leads overview
- Create Dynamics 365 leads
- Lead management lifecycle
- Lead qualification
- Lab - Work with Dynamics 365 leads
- Check your knowledge
- Summary

**Manage opportunities with Dynamics 365 Sales**

- Dynamics 365 opportunity overview
- Create Dynamics 365 opportunities
- Account and team selling
- Opportunity management lifecycle
- Lab - Manage opportunities in Dynamics 365
- Check your knowledge
- Summary

**Leverage Embedded Intelligence in Dynamics 365 Sales**

- Embedded Intelligence overview
- Relationship assistant cards
- Auto Capture
- Email tracking
- Exercise - Build relationships by using Embedded Intelligence
- Check your knowledge
- Summary

**Manage and organize your product catalog with Dynamics 365 Sales**

- Dynamics 365 product catalog overview
- Currencies and currency management
- Define products
- Product families
- Price lists
- Exercise - Set up the product catalog
- Check your knowledge
- Summary

**Process sales orders with Dynamics 365 Sales**

- Sales order processing overview
- Quotes and quote management
- Orders and invoices
- Exercise - Sales order processing lifecycle
- Check your knowledge
- Summary

**Manage relationships with relationship selling in Dynamics 365 Sales**

- Overview
- Enforce best practices with playbooks
- Manage relationship health with Sales Insights
- Social selling assistant
- Sales Navigator
- Exercise - Manage relationships with playbooks and Sales Insights
- Check your knowledge
- Summary

**Analyze Dynamics 365 sales data**

- Analytical options overview
- Search tools
- Out-of-box tools
- Power BI
- Use Power BI templates
- Lab - Analyze data
- Check your knowledge
- Summary

**Define and track individual goals in Dynamics 365 Sales and Customer Service**

- Overview of goals
- Defining individual goals
- Parent and child goals
- Exercise - Measuring customer success using goals
- Check your knowledge
- Summary

**Use goal metrics in Dynamics 365 Sales and Customer Service**

- Overview
- Fiscal year settings
- Goal metrics
- Exercise - Defining goal metrics
- Check your knowledge
- Summary

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## Further Information:

For More information, or to book your course, please call us on 00 966 92000 9278

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