

---

## Dynamics 365 for Customer Engagement for Sales

**Duration: 1 Day**    **Course Code: M-MB210**

---

### Overview:

Microsoft Dynamics 365 for Sales is an end-to-end application to manage the handling of customers and potential customers; tracking data against sales goals, automating your best practices, learning from your 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 Customer Engagement 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.

---

### Objectives:

- After completing this course, you will be able to:
  - Install and configure the application
  - Identify common sales scenarios
  - Complete a sales cycle
  - Configure product catalog
  - Manage customer records
  - Utilize analytics tools with customer data
- 

### Prerequisites:

■

---

## Content:

### Module 1: Configure Dynamics 365 Sales

In this module, we will learn about configuring the sales application to fit an organization's unique requirements.

#### Module 1 Lessons

- Configure organization and management settings

#### Lab: Lab 1.1: Validate lab environment

After completing this module, students will be able to:

- Install and configure the sales application.
- Identify common sales scenarios.
- Create customer records.
- Use sales tooling.
- Create leads and opportunities.
- Create and use the product catalog.
- Add quotes to opportunities.
- Complete a sale with an order.
- Use rollup columns to define sales metrics.
- Track individual goals for sales and teams.
- 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
- Set up and configure Sales Insights
- Work with Assistant studio
- Configure productivity intelligence
- Configure Connection insights
- Configure predictive models
- 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

### Module 2: Manage leads and opportunities with Dynamics 365 Sales

In this module, you will learn how to manage customer data records, use built-in sales tools, and take a lead through the lead lifecycle.

#### Module 2 Lessons

- Manage leads with Dynamics 365 Sales
- Manage opportunities with Dynamics 365 Sales

#### Lab: Lab 2.1: Manage customers

### Module 3: Manage orders and the product catalog with Dynamics 365 Sales

In this module, we will learn how to use quotes and orders to further use Dynamics 365 Sales to manage your sales opportunities and turn them into closed deals.

#### Module 3 Lessons

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

After completing this module, students will be able to:

- Install and configure the sales application.
- Identify common sales scenarios.
- Create customer records.
- Use sales tooling.
- Create leads and opportunities.
- Create and use the product catalog.
- Add quotes to opportunities.
- Complete a sale with an order.
- Use rollup columns to define sales metrics.
- Track individual goals for sales and teams.
- 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
- Set up and configure Sales Insights
- Work with Assistant studio
- Configure productivity intelligence
- Configure Connection insights
- Configure predictive models
- 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

### Module 4: Manage goals with Dynamics 365 Sales

In this module, we will learn how to manage goals to track the success of your sales organization and gather key metrics about sales performance.

#### Module 4 Lessons

### Module 5 Lessons

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

After completing this module, students will be able to:

- Install and configure the sales application.
- Identify common sales scenarios.
- Create customer records.
- Use sales tooling.
- Create leads and opportunities.
- Create and use the product catalog.
- Add quotes to opportunities.
- Complete a sale with an order.
- Use rollup columns to define sales metrics.
- Track individual goals for sales and teams.
- 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
- Set up and configure Sales Insights
- Work with Assistant studio
- Configure productivity intelligence
- Configure Connection insights
- Configure predictive models
- 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

### Module 6: Work with Dynamics 365 Sales Insights

In this module, you will learn about the free and premium features of Dynamics 365 Sales Insights, and how it can empower salespeople to form closer relationships with their customers and close sales faster.

#### Module 6 Lessons

- Configure Sales Insights

After completing this module, students will be able to:

- Install and configure the sales application.
- Identify common sales scenarios.
- Create customer records.
- Use sales tooling.
- Create leads and opportunities.
- Create and use the product catalog.
- Add quotes to opportunities.
- Complete a sale with an order.
- Use rollup columns to define sales metrics.
- Track individual goals for sales and teams.

After completing this module, students will be able to:

- Install and configure the sales application.
- Identify common sales scenarios.
- Create customer records.
- Use sales tooling.
- Create leads and opportunities.
- Create and use the product catalog.
- Add quotes to opportunities.
- Complete a sale with an order.
- Use rollup columns to define sales metrics.
- Track individual goals for sales and teams.
- 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
- Set up and configure Sales Insights
- Work with Assistant studio
- Configure productivity intelligence
- Configure Connection insights
- Configure predictive models
- 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

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

After completing this module, students will be able to:

- Install and configure the sales application.
- Identify common sales scenarios.
- Create customer records.
- Use sales tooling.
- Create leads and opportunities.
- Create and use the product catalog.
- Add quotes to opportunities.
- Complete a sale with an order.
- Use rollup columns to define sales metrics.
- Track individual goals for sales and teams.
- 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
- Set up and configure Sales Insights
- Work with Assistant studio
- Configure productivity intelligence
- Configure Connection insights
- Configure predictive models
- 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

#### Module 5: Analyze Dynamics 365 Sales data

In this module, we will review analytical options, describe search tools, and use Power BI to view and analyze sales data.

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

#### Module 7: Create surveys with Dynamics 365 Customer Voice

In this module, students will learn about Dynamics 365 Customer Voice, a powerful tool for gathering and analyzing customer sentiment.

#### module 7 Lessons

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

After completing this module, students will be able to:

- Install and configure the sales application.
- Identify common sales scenarios.
- Create customer records.
- Use sales tooling.
- Create leads and opportunities.
- Create and use the product catalog.
- Add quotes to opportunities.
- Complete a sale with an order.
- Use rollup columns to define sales metrics.
- Track individual goals for sales and teams.
- 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
- Set up and configure Sales Insights
- Work with Assistant studio
- Configure productivity intelligence
- Configure Connection insights
- Configure predictive models
- 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

---

## Further Information:

For More information, or to book your course, please call us on Head Office 01189 123456 / Northern Office 0113 242 5931

[info@globalknowledge.co.uk](mailto:info@globalknowledge.co.uk)

[www.globalknowledge.com/en-gb/](http://www.globalknowledge.com/en-gb/)

Global Knowledge, Mulberry Business Park, Fishponds Road, Wokingham Berkshire RG41 2GY UK