

# MB-210 Microsoft Dynamics 365 Sales



Microsoft Business Applications

## Instructor-Led Virtual Courses

 365 Talent Portal

Microsoft Learning Partner

**2 half days – 8 hours in total**

### About This Course

Microsoft Dynamics 365 Sales is an end-to-end application that optimizes sales processes by enabling companies to manage customers and potential customers, track data against sales goals, automate best practices and more.

This course will teach you how to implement this application and support your customers to increase the productivity of their sales teams.

### Audience Profile

Microsoft Dynamics 365 Customer Engagement Functional Consultants, Solution Architects and Business Analysts who are looking to learn about the Sales module of Microsoft Dynamics 365 and/or to take the MB-210 certification exam.

### Prerequisites

Students should first take the course: MB-910 Dynamics 365 Fundamentals (Customer Engagement) or have equivalent practical knowledge.

### At Course Completion

After completing this course, you will be able to:

- Install and configure the Dynamics 365 Sales application
- Identify common sales scenarios
- Complete a sales cycle
- Configure product catalog
- Manage customer records
- Utilize analytics tools with customer data

# Course Agenda

## Module 1: Configure Dynamics 365 Sales

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

### Lesson

- Configure organization and management settings

### Lab 1.1: Validate lab environment

After completing this module, you will be able to:

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

### Lesson

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

### Lab 2.1: Manage customers

After completing this module, you will be able to:

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

## 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.

### Lesson

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

### After completing this module, you will be able to

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

## 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.

### Lesson

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

After completing this module, you will be able to:

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

## **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.

### **Lesson**

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

### **After completing this module, you will be able to**

- 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**

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.

### **Lesson**

- Configure Sales Insights

### **After completing this module, you will be able to**

- 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**

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

### **Lesson**

- 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**

- 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

**To register, please contact us on [training@365talentportal.com](mailto:training@365talentportal.com)**