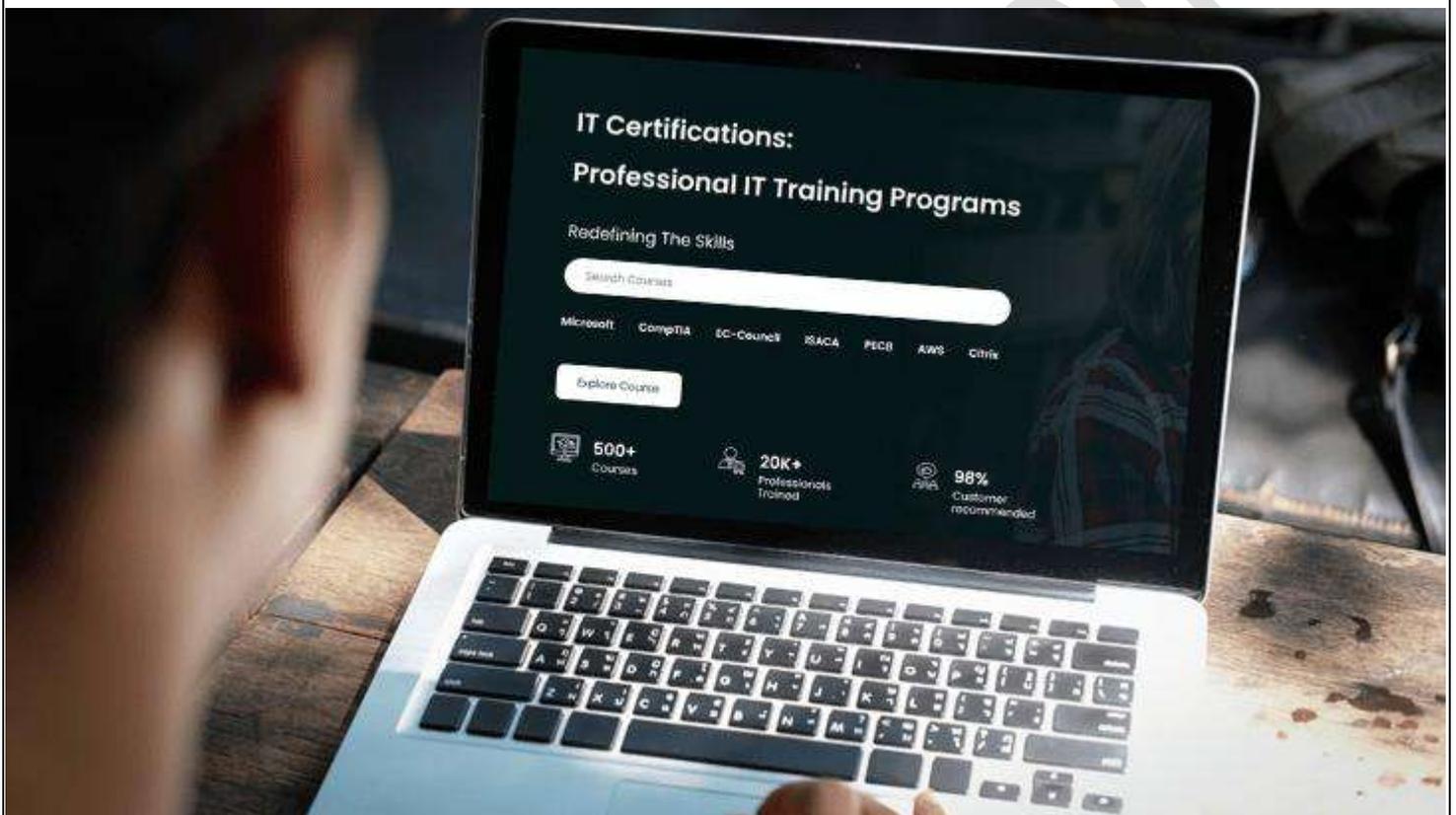




Redefining The Skills



MB-280T02: EMPOWER SELLERS WITH DYNAMICS 365 SALES TRAINING

Duration: 2 Days

Course Description

MB 280T02: Empower Sellers with Dynamics 365 Sales Training is focused on providing a comprehensive understanding of topics like configuring lead and opportunity management strategies.

By pursuing this course students will learn about configuring and leveraging Dynamics 365 Sales for sales team advancement. This course also deals with core concepts like goal management, sales accelerator, and integration of Microsoft 265 services in order to strengthen and enhance sales productivity workflow.

This program is part of a four-course series (MB 280T01-T04). It aligns with the MB 280 certification exam.

- [MB 280T01: Configure Dynamics 365 Customer Experience Model-Driven Apps Training](#)
- [MB 280T03: Design and Deliver Powerful Customer Experience with Dynamics 365 Customer Insights Training](#)
- [MB-280T04: Configure a Dynamics 365 Customer Experience Solution Training](#)

Who should attend this course?

- Any professional willing to learn about leveraging Dynamics 365 and Microsoft Copilot for sales can pursue this certification.
- Given below are professionals who can use Power Platform Solution Architect Training to upskill their current positions:
 - IT Professionals who are experienced
 - Technical Consultants
 - Project Managers
 - Dynamics 365 Professionals
 - System Engineers
 - Technical Architect
 - Dynamics Functional Consultants

What you will learn

- Getting started with Dynamics 365 Sales
- Implementing goal management in Dynamics 365 Sales and Customer Service
- Enhancing Dynamics 365 Sales with tops and apps
- Setting up and using the sales accelerator capabilities in Dynamics 365 Sales
- Understanding and navigating the Dynamics 365 application
- Customizing settings and configuring security roles in Dynamics 365 Sales

Prerequisites

- [MB 910T00: Microsoft Dynamics 365 Fundamentals \(CRM\)](#)
- A basic understanding of Microsoft Dynamics 365 application is needed.
- Basic familiarity with sales concepts and processes.
- One should have a basic understanding of CRM principles and customer engagement strategies.

Curriculum

Module 1: Work with Dynamics 365 Sales

- Create powerful customer experiences for organizations with Dynamics 365 apps
 - How customer engagement apps can be used in an organization
 - How Dynamics 365 and Power Platform can be used with customer engagement apps
- Get started with Dynamics 365 Sales
 - The Dynamics 365 Sales application and how organizations can use it.
 - Core elements of the application and how to navigate within it.
 - Management of customers in the application, and how to work with in-app marketing features.
- Set up and configure Dynamics 365 Sales
 - Learn about the key features of Dynamics 365 Sales and how it can help your organization.
 - Configure key settings that organizations should customize when setting up the application.
 - Set up the included security roles for sales users.
- Manage leads with Dynamics 365 Sales
 - Examine the lead qualification process in Dynamics 365 from beginning to end
 - Identify the different options that are available for creating and defining leads
 - Use business process flows to manage the lead lifecycle
 - Qualify and disqualify leads
- Manage opportunities with Dynamics 365 Sales
 - Identify scenarios where opportunities can be used.
 - Create and define opportunities.
 - Work with related opportunity records
 - Manage an opportunity throughout its lifecycle.
- Manage and organize your product catalog with Dynamics 365 Sales
 - Set up unit groups to help control how products are sold
 - Create product family hierarchies that include product bundles and individual products
 - Set up product pricing data by creating price lists and price list items
 - Use discount lists to provide volume discount pricing
- Process sales orders with Dynamics 365 Sales
 - Define quote records for opportunity records
 - Work a quote through its entire lifecycle
 - Add and revise quote product line items
 - Deliver quotes to customers
- Configure forecasts in Dynamics 365 Sales
 - Configuration of forecasts based on specific needs.
 - Available forecast management and advanced configuration options.
 - Available premium forecasting features.
- Manage relationships with relationship selling in Dynamics 365 Sales
 - Discover best practices
 - Manage relationship health with Sales Insights
 - Recognize features of Sales Navigator
- Analyze Dynamics 365 sales data
 - Review analytical options
 - Describe searching tools
 - Utilize Power BI to view data
 - Analyze data

Module 2: Set up and use the sales accelerator capabilities in Dynamics 365 Sales

- Set up Sales accelerator in Dynamics 365 Sales
 - Learn about the Sales accelerator and what it does.
 - Explore how to set up Sales accelerator.

- Examine how to manage access and record types.
- Discover how to customize the workspace.
- Learn how to set up filtering and sorting.
- Learn how to add the Up next widget to forms.
- Create sales sequences with Sales Insights
 - Create a basic sequence.
 - Connect a sequence to a record.
 - Disconnect a sequence from a record.
 - Edit a sequence.
 - Establish a flow to automatically connect sequences to records.
- Work with segments in Dynamics 365 Sales accelerator
 - Examine how to create and activate segments.
 - Explore how to connect segments to sequences.
 - Learn how to view the details of a segment.
 - Explore how to manage a segment, including how to edit, change the priority, deactivate, or delete a segment.
- Work with assignment rules in Dynamics 365 Sales accelerator
 - Discover the different options that are available for assigning lead and opportunity records.
 - Explore how to specify which sellers can have records assigned to them.
 - Examine what seller attributes are and how to create them.
 - Learn about seller availability and how it impacts record assignment.
 - Examine how to create and activate assignment rules.
 - Explore the options that are available for managing rules.
 - Learn how to manage unassigned records.
- Engage with customers through text messages in Dynamics 365 Sales
 - Explore the available text messaging capabilities in Dynamics 365 Sales.
 - Learn how to set up a text messaging provider.
 - Discover how to edit phone numbers.
 - Explore how to add the text message option to forms.
 - Learn how to work with text messages.

Module 3: Implement goal management in Dynamics 365 Sales and Customer Service

- Define and track individual goals in Dynamics 365 Sales and Customer Service
 - Create and manage individual goals
 - Use Parent and Child goals
 - Monitor goal progress
- Use goal metrics in Dynamics 365 Sales and Customer Service
 - Determine with metrics are needed to build efficient customer service goals
 - Modify Fiscal Year settings to align goal progress
 - Define Goal Metrics for an Organization
 - Create custom Roll-up columns and Queries

Module 4: Enhance Dynamics 365 Sales with tools and apps

- Use Microsoft 365 services with model-driven apps and Microsoft Dataverse
 - Integrate email with Microsoft Dataverse to show emails as activities in Dynamics 365 applications and model-driven apps.
 - Examine server-side synchronization and learn why it matters in Power Platform implementations.
 - Review and set up document management options that are available through Microsoft SharePoint.

- Learn about the app for Outlook and how to deploy it.
- Tailor the app for Outlook.
- Get started with the Dynamics 365 Sales mobile app
 - Learn how to deploy and use the Dynamics 365 Sales mobile app.
 - Manage records.
 - Customize form views.
 - Set up push notifications.

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