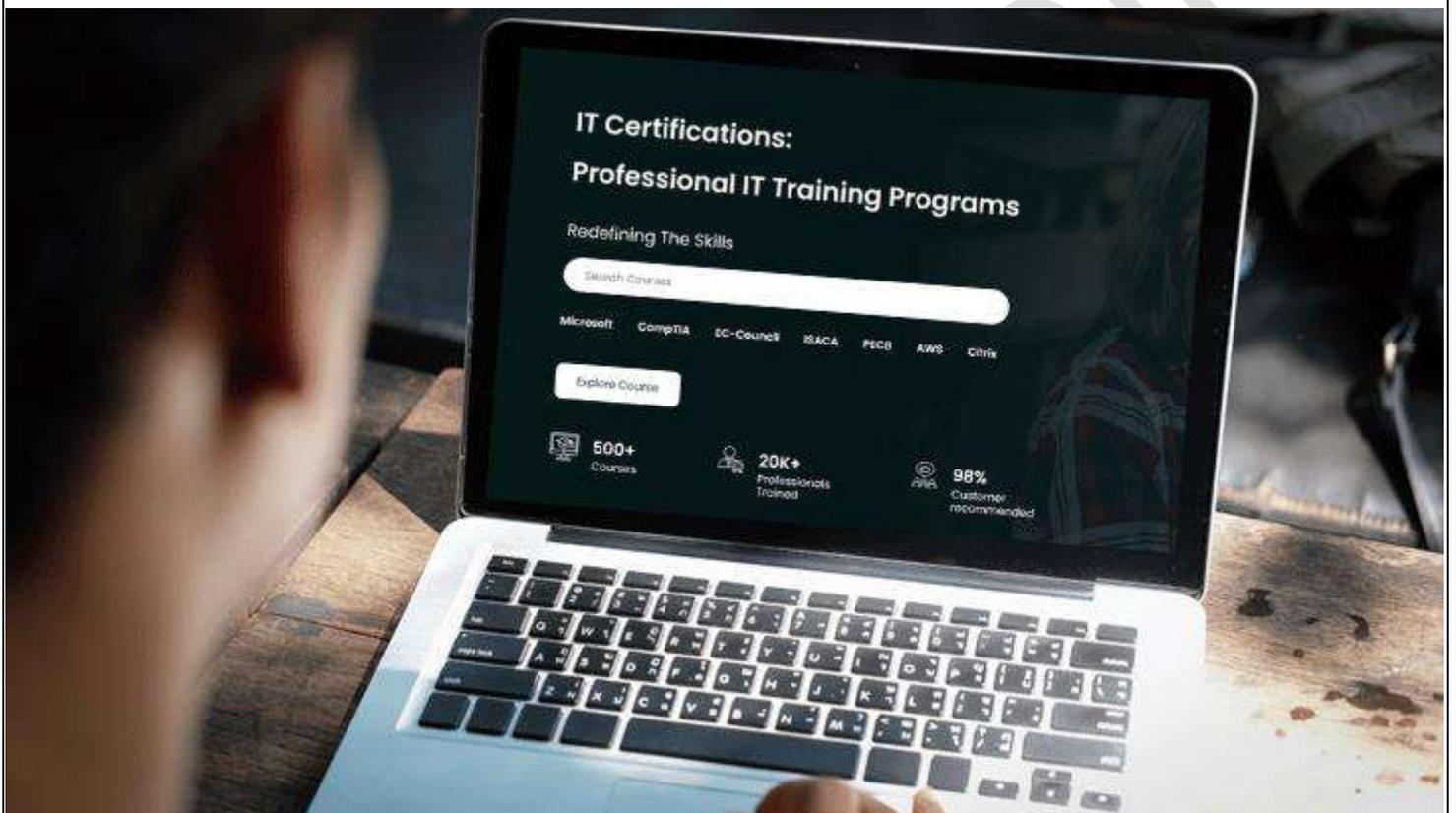# MB-210T01: MICROSOFT DYNAMICS 365 SALES TRAINING

Duration: 1 Day

Course Description

MB-210T01: Microsoft Dynamics 365 for Customer Engagement for Sales Training provides professionals with the knowledge and skills to manage current and potential clients more effectively.

This technical course teaches to track data against goals and sales and automate best practices by utilizing MS Dynamics 365 for Sales.

From transforming lead into opportunity and then to a closed opportunity, this training covers all the essential elements. It teaches the leading methodologies to enable sales staff to be extremely productive by using customization options and available automation.

After completing this course, professionals will be able to handle customer records and use the analytics tool with customer data.

This training program is suitable for professionals who perform discovery, translate requirements, engage subject matter experts, and configure applications and solutions.

This training prepares you for the "Exam MB-210: Microsoft Dynamics 365 Sales".

This training is designed based on the objectives of the course variant MB-210T01-A.

Training Exclusives

- Live instructor-led interactive sessions with Microsoft Certified Trainers (MCT).
- Access to Microsoft Official Courseware (MOC).
- Real-time Virtual Lab Environment.
- Experience 24*7 Learner Support.
- Self-paced learning and flexible schedules.

Who should attend this course?

This training is intended for professionals who are planning to become Dynamics 365 Customer Engagement Functional Consultants.

A functional consultant is responsible for configuring applications and solutions, determining, and translating requirements, and discovering, and engaging stakeholders and subject matter experts.

They are also responsible for implementing a suitable solution using service and application integrations, codeless extensibility, and unique capabilities.

What you will learn

- Installing and configuring the application
- Identifying common sales solutions
- Completing a sales cycle
- Configuring product catalogue
- Managing customer records
- Utilizing analytics tools to analyze customer data

Prerequisites

The familiarity of business applications and the desire to customize and implement them for your business

Curriculum

Module 1: Configure Dynamics 365 Sales

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

Lessons

- 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.

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.

Lessons

- 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.

Lessons

- 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.

Lessons

- 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.

Lessons

- 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.

Lessons

- 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.

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:

- 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

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