

MB-210T01 Dynamics 365 for Customer Engagement for Sales

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.

Prerequisite Comments

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

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.

Course 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

Course Outline

1 - Sales Overview

- Sales overview
- Configuring Sales
- Module summary

2 - Working with Opportunities

- Manage customers
- Working with opportunities
- Embedded intelligence
- Playbooks
- Integrated sales tools
- Module summary

3 - Quotes to Orders

- Order processing overview
- Manage product catalog
- Create and manage quotes
- Create and manage orders and invoices
- Module summary

4 - Sales Analytics and Insights

- Overview
- Power BI
- AI for Sales
- Modules summary
