



Dynamics 365 Sales

Course Level: 100



Learn more about what Dynamics 365 Sales has to offer as a powerful sales force automation tool for your organization. This instructor-led course is a deep-dive into the default record types, processes and configuration of the Dynamics 365 Sales application. Explore the core record types and functionality of lead to opportunity management, marketing lists, campaigns, competitors, quotes, orders, invoices, territories and sales literature. Configure key functionality of the application using Product Catalog, Playbooks, and Forecast settings as well as other administrative settings.



At A Glance:

Dynamics 365 Sales



Why Enroll?

Empower admins, power users, and customizers to gain a deep understanding of Dynamics 365 Sales



Key Takeaways

Lead management, Marketing Lists, Campaigns, Opportunity Management, Quote to Order Processes, Product Catalog Configuration, Playbooks, and Forecasts



Who to Enroll?

- System Administrators
- Power Users
- Customizers
- Developers



Register

Register for Dynamics 365 Sales today!

[Click to Register.](#)



About This Training



Intended Audience

This course is designed to support individuals who will be setting up and administering Sales within Dynamics 365. It is not intended for front of house users.



Required Prerequisites

Participants are highly advised to be comfortable and confident with the following skills and concepts for a successful learning experience:

- Search; navigation; activities; and advanced find within Microsoft Dynamics 365
- Creating views; charts; and dashboards
- Data entry in forms and process flows



Recommended Prerequisites

Familiarity with the following skills/concepts is recommended:

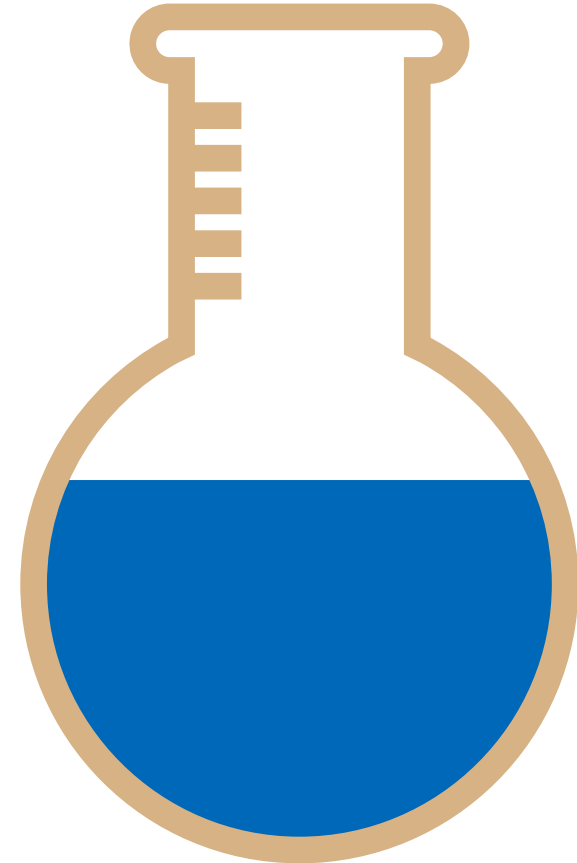
- Understanding of data or relational databases is helpful as well as familiarity with sales processes
- Dynamics 365 data structure and user experience customization
- Dynamics 365 University Dataverse 100 is recommended as a prerequisite or in conjunction with this course as an overall introduction to end-user functionality.



Key Takeaways

This Training Will Allow You To:

- Understand the in-app marketing functionality of Leads, Marketing Lists, Campaigns, and Quick Campaigns in the Dynamics 365 Sales application
- Hands-on work with the core sales records and their functions covering Lead to Opportunity management, quotes, orders, invoices, competitors, sales literature and territories
- How to set-up and manage the Product Catalog, Playbooks, and Forecast features
- Experience with utilizing and configuring the Sales-Insights add-on and recent enhancements to the application





DAY 1



DAY 2

MARKETING

SALES APP: MARKETING AREA

- Marketing Automation
- Marketing in the Sales Process

LEAD MANAGEMENT

- Lead to Opportunity Process Flow
- Creating Leads
- Qualifying and Disqualifying

MARKETING LISTS

- Using Marketing Lists
- Static Lists
- Dynamics Lists
- Email Templates and Marketing Lists

CAMPAIGN MANAGEMENT

- Quick Campaigns
- Campaigns
 - Components
 - Campaign Templates
 - Campaign Responses
- Marketing Campaign Benefits
- Marketing Integration Options

SALES

OPPORTUNITY MANAGEMENT

- Opportunity Close Process Flow
- Creating Opportunities
- Closing Opportunities

SALES ORDER PROCESSING

- Quotes; Orders and Invoices
- Tracking Competitors
- Incorporating Sales Literature
- Sales Territories



DAY 1



DAY 2

SALES

PRODUCT CATALOG

- Benefits
- Components
 - Unit Groups
 - Products
 - Price Lists
 - Discount Lists

PLAYBOOKS

- Defined
- Setups
 - Categories
 - Templates
- Launch and Use

FORECASTS

- Forecast Types
- Forecast Configuration
- Managing Forecasts

SALES INSIGHTS ADD-ON

- Included vs. Premium Sales Insights Features
- Feature Configurations for the Included Sales Insights Features of
 - The Assistant
 - Email Engagement
 - Auto-Capture
- Overview of Premium Capabilities



Dynamics 365 University is designed to be **foundational training for those responsible for implementing and supporting Dynamics 365** within your organization. Dynamics 365 University focuses on out-of-the-box features and functionality **training for your core team**. Participants get an understanding of how the Dynamics 365 processes and architecture can be leveraged and customized to **support your unique organizational processes**.

GET STARTED