

MB-210T01 Dynamics 365 for Customer Engagement for Sales

Course Overview

This is a 1-day class

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.

Join our team of globally recognized experts as they take you step by step from lead to opportunity to closed deal. Using the application's available automation and customization options you will learn how to enable sales staff to be their most productive selves.

Upcoming Dates

Date	Time	Where
02/04/2021	9:00AM - 5:00PM	Online LIVE
06/02/2021	9:00AM - 5:00PM	Online LIVE

[View All Course Dates & Register Today](#)



Who Should Attend

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

- 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

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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