

Microsoft Dynamics 365 Sales

Content

Module 1: Configure Dynamics 365 Sales

- **Lessons**
 - Configure organization and management settings
 - **Lab 1.1:** Validate lab environment
- **Learning Objectives**
 - Install and configure the sales application.
 - Identify common sales scenarios.

Module 2: Manage Leads and Opportunities with Dynamics 365 Sales

- **Lessons**
 - Manage leads with Dynamics 365 Sales
 - Manage opportunities with Dynamics 365 Sales
 - **Lab 2.1:** Manage customers
- **Learning Objectives**
 - Create customer records.
 - Use sales tooling.
 - Create leads and opportunities.

Module 3: Manage Orders and the Product Catalog with Dynamics 365 Sales

- **Lessons**
 - Manage and organize your product catalog with Dynamics 365 Sales
 - Process sales orders with Dynamics 365 Sales
- **Learning Objectives**
 - Create and use the product catalog.
 - Add quotes to opportunities.
 - Complete a sale with an order.

Module 4: Manage Goals with Dynamics 365 Sales

- **Lessons**
 - Define and track individual goals with Dynamics 365 Sales
 - Use goal metrics in Dynamics 365 Sales
- **Learning Objectives**
 - Use rollup columns to define sales metrics.
 - Track individual goals for sales and teams.

Module 5: Analyze Dynamics 365 Sales Data

- **Lessons**

- Analyze data in Dynamics 365 Sales
- Analyze data with Power BI
- **Learning Objectives**
 - 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

- **Lessons**
 - Configure Sales Insights
- **Learning Objectives**
 - 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

- **Lessons**
 - Create a survey project with Dynamics 365 Customer Voice
 - Create surveys with Dynamics 365 Customer Voice
 - Send Dynamics 365 Customer Voice surveys
- **Learning Objectives**
 - 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.