

MB-210T01-A

Dynamics 365 for customer engagement for Sales

16 horas

Dynamics 365

Microsoft

INTRODUÇÃO

Microsoft Dynamics 365 Sales is an end-to-end application to manage the handling of customers and potential customers. Using Dynamics 365 Sales, organizations can track data against sales goals, automate best practices, learn from 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.

OBJETIVO DO CURSO

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PÚBLICO-ALVO

Audience Profile

A Dynamics 365 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.

PRÉ-REQUISITOS

Prerequisites

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

Course outline

Module 1: Work with Dynamics 365 Sales

Generate leads, create opportunities, and utilize embedded intelligence with Microsoft Dynamics 365 Sales. This learning path covers the key elements of the Sales app.

- Set up and configure Dynamics 365 Sales
- Manage leads with Dynamics 365 Sales
- Manage opportunities with Dynamics 365 Sales
- Manage and organize your product catalog with Dynamics 365 Sales
- Process sales orders with Dynamics 365 Sales
- Manage relationships with relationship selling in Dynamics 365 Sales
- Analyze Dynamics 365 sales data

Module 2: Implement goal management in Dynamics 365 Sales and Customer Service

Apply goal management to track your individual, parent, and child goals. Analyze the results of your goal management to make better business decisions.

- Define and track individual goals in Dynamics 365 Sales and Customer Service
- Use goal metrics in Dynamics 365 Sales and Customer Service

Module 3: Enhance Dynamics 365 Sales with tools and apps

Tools like Microsoft 365 apps, embedded intelligence features, and the Dynamics 365 Sales mobile app empower your salespeople to use Dynamics 365 Sales to its fullest potential. This learning path covers the additional tools and applications that allow your sales team to create cohesive customer experiences, even on the go.

- Use Microsoft 365 services with model-driven apps in Dynamics 365 customer engagement apps
- Leverage Embedded Intelligence in Dynamics 365 Sales
- Get started with the Dynamics 365 Sales mobile app