

MB-210: Microsoft Dynamics 365 Sales Functional Consultant

Course outline

Standard Duration: 16 Hours

Learning Path 1: Work with Dynamics 365 Sales

This module serves as an introduction to the Sales Hub Application and helps to have an understanding to generate leads, create opportunities, and utilize embedded intelligence with Microsoft Dynamics 365 Sales. This learning path covers the key elements of the Sales app.

Lessons

- 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

Lab 1.1: Validate lab environment

Lab 2.1: Manage customers

Lab 3.1: Manage product catalog

Lab 3.2: Build quotes

Lab 3.3: Orders and invoices

Lab 5.1: Configure a dashboard

Lab 6.1: Build a sequence

After completing this module, students will be able to:

- Set up and configure Dynamics 365 Sales
- Describe Lead Management in Dynamics 365 Sales
- Describe Opportunity Management in 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

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

This module introduces learners to applying goal management to track their individual, parent, and child goals. Analyze the results of your goal management to make better business decisions.

Lessons

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

Lab: Self Practice recommended. No official Lab is available.

After completing this module, students will be able to:

- Describe and understand the Goal Management in Dynamics 365 Sales

Learning Path 3: Enhance Dynamics 365 Sales with tools and apps

This module provides an introduction to tools like Microsoft 365 apps and the Dynamics 365 Sales mobile app to 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.

Lessons

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

Lab: Self Practice recommended. No official Lab is available.

After completing this module, students will be able to:

- You will have an understanding of Microsoft 365 services, such as SharePoint and Microsoft Exchange, which can help fill areas where Dynamics 365 applications don't have the tools necessary to help meet your specific needs.
- Understanding of how Dynamics 365 Sales mobile app helps sellers build better relationships with their customers and be more productive.

Learning Path 4: Manage goals and forecasts with Dynamics 365 Sales

This module will help you define and track Goal metric and help you in forecasting

Lessons

- Define and track goals in Dynamics 365 Sales
- Manage forecasting in Dynamics 365 Sales

After completing this module you will be able to

- Learned about goal management, including rollup columns and fiscal year configuration.
- Learned about forecasting, including forecast templates and predictive forecasting.

Learning Path 5: Analyze Dynamics 365 Sales data

Lessons

- Analyze data in Dynamics 365 Sales
- Analyze data with Power BI

Lab 5.1: Configure a Dashboard

After completing this module you will be able to

- Identified the out-of-the-box tools available in Dynamics 365 for analyzing data.
- Created a dashboard out of visualizations to view all your seller insights in one place.

Used Power BI in conjunction with Dynamics 365 Sales for deeper insights into data

Learning Path 6:

Work with Dynamics 365 Sales Insights and the Sales accelerator

Lessons

- Get started with Dynamics 365 Sales Insights
- Get started with the Sales accelerator

Lab

Lab 6.2: Create a Sequence

In this module you will be able to

- Configured Sales Insights for your organization and enable features based on your organization's needs.
- Set up the Sales accelerator.
- Configured the Up next widget, design sequences, and build assignment rules.

Learning Path 7: Create surveys with Dynamics 365 Customer Voice

Lessons

- Create a survey project
- Create surveys with Dynamics 365 Customer Voice
- Send Dynamics 365 Customer Voice surveys

After completing this module

Gathered customer feedback through Customer Voice.
Customized surveys to match your organization's brand presence.
Shared surveys with customers.

Learning Path 8: Enhance seller productivity by extending Dynamics 365 Sales

Lessons

- Boost sales performance with Microsoft Sales Copilot
- Get started with the Dynamics 365 Sales mobile app
- Use Microsoft 365 services with Dynamics 365 Sales

After completing this module you will be able to

- Learned how to jumpstart seller productivity with Microsoft Sales Copilot.

- Took our work on the go with the Dynamics 365 Sales mobile app.
- Set up and configured Microsoft 365 services to help extend Dynamics 365 Sales functionality.