

MB 280T02 A: Empower Sellers with Dynamics 365 Sales



Days: 2

Prerequisites: Students should have knowledge in basic sales principles. Students should be familiar with the Dynamics 365 customer experience suite, including Dynamics 365 Sales and Dynamics 365 Customer Insights. They should also have basic model-driven application configuration experience.

Audience: This course is designed for IT or sales professionals who want to learn how to leverage Dynamics 365 Sales and Microsoft Copilot for Sales for their organizations.

Description: Dynamics 365 Sales helps accelerate sales teams' efforts with relationship-building tools and AI-driven insights. In this course, students will learn how to configure and leverage Dynamics 365 Sales to set sales teams up for success. First, students will set up and configure lead and opportunity management strategies. Then students will organize their product catalog and process sales orders. Finally, students will leverage relationship-selling features, the Sales Accelerator, and Sales Insights. In this course students will also learn how to set up and deploy Microsoft Copilot for Sales, a productivity tool to help sellers inside and outside Dynamics 365 Sales.

Course Objectives:

This workshop teaches students how to:

- Configure core features of Dynamics 365 Sales, including lead/opportunity setup, product catalog and pricing, and sales order processing.
- Manage the full sales lifecycle, from lead creation through opportunity and quote management.
- Establish forecasting and goal-management frameworks, and perform analytics using Power BI and built-in tools.
- Implement productivity-enhancing features such as Sales Accelerator, Sales Insights, and Microsoft Copilot for Sales.
- Enable mobile and cross-platform collaboration by deploying Dynamics 365 Sales to mobile, Outlook, and other integrations.

OUTLINE:

MODULE 1: WORK WITH DYNAMICS 365 SALES

- Navigate the Dynamics 365 Sales application and use core features.
- Manage customers and basic in-app marketing features.
- Set up and configure Dynamics 365 Sales, including security roles and document management.
- Create, qualify, and disqualify leads.
- Create and manage opportunities through their lifecycle.
- Organize the product catalog, including products, families, bundles, price lists, and discount lists.
- Process sales orders by working with quotes, orders, and invoices.
- Configure forecasting and goal-management structures.
- Use analytics and reporting tools, including search capabilities and Power BI.

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MODULE 2: SET UP AND USE THE SALES ACCELERATOR

- Configure the Sales Accelerator workspace, including record types, forms, filters, sorting, and “Up Next” actions.
- Create, edit, and manage sales sequences.
- Create and activate sales segments and connect segments to sequences.
- Configure and manage assignment rules, seller attributes, and seller availability.
- Set up and use text messaging features, including providers, phone number formatting, form integration, and message tracking.

MODULE 3: IMPLEMENT GOAL MANAGEMENT

- Define individual, parent, and child goals in Dynamics 365 Sales and Customer Service.
- Configure goal metrics, including fiscal settings, roll-up columns, and custom queries.
- Track and analyze goal progress.

MODULE 4: ENHANCE DYNAMICS 365 SALES WITH TOOLS AND APPS

- Integrate Microsoft 365 services, including server-side sync, Outlook, and document management.
- Deploy and use the Dynamics 365 Sales mobile app.
- Customize mobile views, manage records on mobile, and configure push notifications.