

Course duration

- 1 day

Course Benefits

- Learn to install and configure the application.
- Learn to identify common sales scenarios.
- Learn to complete a sales cycle.
- Learn to configure product catalog.
- Learn to manage customer records.
- Learn to utilize analytics tools with customer data.

Microsoft Certified Partner

Webucator is a Microsoft Certified Partner for Learning Solutions (CPLS). This class uses official Microsoft courseware and will be delivered by a Microsoft Certified Trainer (MCT).

Course Outline

1. Sales Overview
 1. Sales overview
 2. Configuring Sales
 3. Module summary
2. Working with Opportunities
 1. Manage customers
 2. Working with opportunities
 3. Embedded intelligence
 4. Playbooks
 5. Integrated sales tools
 6. Module summary
3. Quotes to Orders
 1. Order processing overview
 2. Manage product catalog
 3. Create and manage quotes
 4. Create and manage orders and invoices
 5. Module summary
4. Sales Analytics and Insights
 1. Overview
 2. Power BI

3. AI for Sales
4. Modules summary

Class Materials

Each student will receive a comprehensive set of materials, including course notes and all the class examples.

Class Prerequisites

Experience in the following *is required* for this Dynamics 365 class:

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