

Course duration

- 1 day

Course Benefits

- Understand the features and tools that exist in Microsoft Dynamics 365 for SR's and Sales Managers
- Be familiar with the stages of the Sales Order Process in Microsoft Dynamics 365
- Understand the fundamentals of Lead and Opportunity Management. Be able to track, manage, qualify Leads and convert to Opportunities and related customer records in Microsoft Dynamics 365
- Know how to disqualify and cancel Leads, and convert Activity records to Leads and Opportunities
- Understand how to collaborate on Opportunities with other SR's and close Opportunity records as Won and Lost
- Be able to track Competitors and Stakeholders
- Understand how to view Resolution Activities
- Add Products and Write-In Products to Opportunities
- Build and maintain a repository of Products, Product Bundles and Product Families in the Product Catalog
- Configure Unit Groups, Price Lists and Discount Lists
- Work with Product Properties and view a Product Hierarchy
- Create Quotes and add Products
- Work with the Sales Order Process to convert Quotes to Orders and Invoices
- Fulfill Orders and manage Invoice payments
- Explore the Sales Reports and create a custom Sales Report using the Reporting Wizard in Microsoft Dynamics 365
- Understand the significance of Sales Goal Management and Metrics in Microsoft Dynamics 365
- Explore the Sales Charts and Dashboards and create a custom Sales Dashboard in Microsoft Dynamics 365

Course Outline

1. Introduction
 1. Sales Order Process Scenarios
 2. An Introduction to Sales in Dynamics 365
 3. The Dynamics 365 Platform
 4. Dynamics 365 Sales Fundamentals
 5. Security Considerations
 6. Where to get Help

7. Further Reading and Resources
8. Lab 1: Sales in Dynamics 365 Orientation
9. Explore the Sales features in Dynamics 365
2. Lead Management
 1. The Lead Management Process
 2. Working with Lead Records
 3. Working with the Lead Form
 4. Lead Assignment
 5. Leads and Activities
 6. Qualifying a Lead
 7. Disqualifying a Lead
 8. Lab 1: Working with Leads
 9. Create a Lead record
 10. Update a Lead record
 11. Qualify a Lead to an Opportunity record
 12. Disqualify a Lead record
 13. Convert an Email activity to a Lead record
3. Opportunities Management
 1. Introduction to Opportunities
 2. The Opportunity Views
 3. The Opportunity Form
 4. Opportunity Sales Process
 5. Closing an Opportunity
 6. Resolution Activities
 7. Lab 1: Working with Opportunities
 8. Working on Opportunities
 9. Closing an Opportunity as Lost
 10. Closing an Opportunity as Won
4. Products
 1. In this module we will start to look at the Product Catalog in Dynamics 365. We look at how to create Products and configure Unit Groups and Price Lists. Finally, we look at Product Properties, Product Bundles and Product Families.
 2. Introduction to the Product Catalog
 3. Adding Products
 4. Configuring Unit Groups
 5. Price Lists and Price List Items
 6. Product Properties, Bundles and Families
 7. Lab 1: Configuring the Product Catalog
 8. Configure Unit Groups
 9. Add a Product
 10. Create and Configure a Price List
 11. Lab 2: Working with the Product Catalog
 12. Clone a Product
 13. Create a Product Bundle
 14. Create a Product Family
5. Quotes, Orders and Invoices
 1. Introduction to Order Processing

2. Adding Products to an Opportunity
3. Working with Quotes
4. Working with Orders
5. Working with Invoices
6. Lab 1: Working with Quotes, Orders and Invoices
7. Add Products to an Opportunity
8. Add a Quote to an Opportunity
9. Convert a Quote to an Order and Invoice
6. Sales Analysis
 1. Introduction to Sales Analysis in Dynamics 365
 2. The Sales Reports
 3. The Reporting Wizard
 4. Working with Sales Charts
 5. Working with Sales Dashboards
 6. Working with Sales Goals and Metrics
 7. Lab 1: Explore the Sales Reports
 8. Exploring the Sales Pipeline Report
 9. Exploring the Quote Report
 10. Lab 2: Sales Goals and Metrics
 11. Create Goals for the Sales Team
 12. Create a Personal View
 13. View Sales Goals and Chart
 14. Lab 3: Explore the Sales Charts and Dashboards
 15. Explore the Lead and Opportunity Charts
 16. Create a custom Sales Chart
 17. Explore the Sales Dashboards
 18. Create a custom Sales Dashboard

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:

- An existing working knowledge of either Microsoft Dynamics 365 or Microsoft Dynamics CRM.

Prerequisite Courses

Courses that can help you meet these prerequisites:

- [Introduction to Microsoft Dynamics 365](#)