# Sales for Dynamics 365

**Course Level: 100**

Use Dynamics 365 for Sales to keep track of your accounts and contacts, nurture your sales from lead to order, and create sales collateral. It also lets you create marketing lists and campaigns, and even follow service cases associated with specific accounts or opportunities. This instructor-led course is a one-day deep dive into the default record types, processes and configuration of Dynamics 365 for Sales.

**DYNAMICS 365 UNIVERSITY**

# At A Glance:
## Dynamics 365 for Sales

## Why Enroll?
Empower Admins; Power Users; & Customizers to gain a deep understanding of Dynamics 365 for Sales

## Who to Enroll?
System Administrators -
Power Users -
Customizers -
Developers -

## Key Takeaways
Lead management; Marketing lists; Campaigns; Opportunity management; Sales reporting; Product Catalog; Goals; Playbooks

## Register
Register for a Dynamics 365 for Sales today!

**Click to Register.**

POWER OBJECTS
An HCL Technologies Company

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# About this
# Training

## Intended Audience

This course is designed to support individuals who will be setting up and administering Sales within Dynamics 365. It is not intended for front of house users.

## Required Prerequisites

Participants are *highly* advised to be comfortable and confident with the following skills and concepts for a successful learning experience:
- Search; navigation; activities; and advanced find within Microsoft Dynamics 365
- Creating views; charts; and dashboards
- Data entry in forms and process flows

## Recommended Prerequisites

Familiarity with the following skills/concepts is recommended:
- Understanding of data or relational databases is helpful
- Dynamics 365 data structure and user experience customization
- Dynamics 365 University CRM Boot Camp is recommended

# Key
# Takeaways

## This Training Will Allow You To:

- Understand the default record types and built in processes for lead, campaign and sales opportunity management
- Understand and create marketing lists and campaigns
- Understand the default record types and built in processes for quotes, orders and invoices
- Understand configuration options for the product catalog
- Understand the goal tracking capabilities
- Understand playbook configuration and use

# DAY 1

## MARKETING

### Sales App: Marketing Area
- Marketing Automation
- Marketing in the Sales Process

### Lead Management
- Lead to Opportunity Process Flow
- Creating Leads
- Qualifying and Disqualifying

### Marketing Lists
- Using Marketing Lists
- Static Lists
- Dynamics Lists
- Email Templates and Marketing Lists

### Campaign Management
- Quick Campaigns
- Campaigns
    - Components
    - Campaign Templates
    - Campaign Responses
- Marketing Campaign Benefits
- Marketing Integration Options

## SALES

### Opportunity Management
- Opportunity Close Process Flow
- Creating Opportunities
- Closing Opportunities

### Sales Order Processing
- Quotes; Orders and Invoices
- Tracking Competitors
- Incorporating Sales Literature
- Sales Territories

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# DAY 1

## SALES

**Sales Pipeline Reporting**
- Default Views, Charts & Dashboards
- Default Reports & Document Templates
- Add-Ons Available from Microsoft
  - Sales Insights AI
  - Power BI Sales Analytics App

**Product Catalog**
- Benefits
- Components
  - Unit Groups
  - Products
  - Price Lists

**Goals**
- Overview
- Components
  - Metric
  - Goal Record
  - Parent & Child Goals
  - Roll Up Queries
- Reporting

**Playbooks**
- Defined
- Setups
  - Categories
  - Templates
- Launch and Use

**Sales Insights Embedded Intelligence**
- Relationship Assistant
- Email Engagement
- Auto-Capture
- Intelligence Configuration

# DYNAMICS 365 UNIVERSITY

Dynamics 365 University is designed to be foundational training for those responsible for implementing and supporting Dynamics 365 within your organization. Dynamics 365 University focuses on out-of-the-box features and functionality training for your core team. Participants get an understanding of how the Dynamics 365 processes and architecture can be leveraged and customized to support your unique organizational processes.

GET STARTED