MB-210: Microsoft Dynamics 365 Sales

Microsoft - Business Applications

Live Training (também disponível em presencial)

- **Localidade:** Lisboa
- **Data:** 09 Oct 2023
- **Preço:** 1010 € (Os valores apresentados não incluem IVA. Oferta de IVA a particulares e estudantes.)
- **Horário:** Laboral das 09h00 - 17h00
- **Nível:**
- **Duração:** 14h

Sobre o curso

Microsoft Dynamics 365 Sales is an end-to-end application to manage the handling of customers and potential customers.

Using Dynamics 365 Sales, organizations can track data against sales goals, automate best practices, learn from data, and more.Join our team of globally recognized experts as they take you step by step from lead to opportunity to closed deal. Using the application's available automation and customization options you will learn how to enable sales staff to be their most productive selves.

Destinatários

A Dynamics 365 Functional Consultant is responsible for performing discovery, capturing requirements, engaging subject matter experts and stakeholders, translating requirements, and configuring the solution and applications. The Functional Consultant implements a solution using out of the box capabilities, codeless extensibility, application and service integrations.

Objetivos

- Cover the key elements of the Sales app
- Analyze the results of goal management to make better business decisions
- Cover the additional tools and applications that allow your sales team to create cohesive customer

experiences, even on the go

Condições

Ao concluir com aproveitamento esta formação, cumprindo a percentagem mínima de 70% de assiduidade e após avaliação ao curso, o formando poderá receber o seu Certificado Microsoft de conclusão e o badge digital para partilhar com a sua rede profissional online.

Pré-requisitos

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

Programa

- Set up and manage Dynamics 365
- Advanced configuration for Dynamics 365
- Review domain authentication, email best practices, and GDPR in Dynamics 365
- Manage assets and content settings in Dynamics 365
- Manage customers in Dynamics 365
- Manage forms and pages in Dynamics 365
- Manage emails, segments, and journeys in Dynamics 365
- Manage subscription centers and double opt-in in Dynamics 365
- Manage website visits, redirect URLs, and social postings in Dynamics 365
- Create an on-site event in Dynamics 365
- Create a webinar event in Dynamics 365
- Promote events, manage registration and check-ins, and review results in Dynamics 365
- Advanced event management features in Dynamics 365
- Evaluate marketing initiatives with analytics in Dynamics 365
- Review the marketing calendar in Dynamics 365

Set up and configure Dynamics 365 Sales

Dynamics 365 Sales helps salespeople build strong relationships with their customers, act based on insights, and close sales faster. It also helps to track accounts and contacts, nurture sales from lead to order, and create sales collateral. This module introduces the Dynamics 365 Sales application and explains how to set up the application.

In this module, you will:

- Learn about the key features of Dynamics 365 Sales and how it can help your organization.
- Configure key settings that organizations should customize when setting up the application.
- Set up the included security roles for sales users.

Manage leads with Dynamics 365 Sales

The lead management capabilities in Microsoft Dynamics 365 let you connect with your customers in a whole new way. This module provides an overview of what leads are, and describes the different options for creating leads, managing them, and working with them throughout their lifecycle. It also provides information about qualifying and disqualifying leads. The more leads you have, the greater your chances of getting opportunities and successfully closing deals.

In this module, you will:

- Examine the lead qualification process in Dynamics 365 from beginning to end
- Identify the different options that are available for creating and defining leads
- Use business process flows to manage the lead lifecycle
- Qualify and disqualify leads

Manage opportunities with Dynamics 365 Sales

The opportunity management capabilities in Microsoft Dynamics 365 make it easy to manage opportunities and convert more leads. In this module, you'll learn how and when opportunities are used and managed in Dynamics 365. You'll also learn about the options for creating opportunities, their relationships with other records, and how to manage them throughout their lifecycle. By providing a complete view of the customer, Dynamics 365 helps you win more deals.

In this module, you will:

- Identify scenarios where opportunities can be used
- Create and define opportunities
- Work with related opportunity records
- Manage an opportunity throughout its lifecycle

Work with Dynamics 365 Sales insights

Configure and work with Dynamics 365 Sales Insights data to gain insights to your customers. This learning path covers configuration and working with Sales Insights.

Manage and organize your product catalog with Dynamics 365 Sales

Microsoft Dynamics 365 helps organize and manage even the most complex product catalog to support

your customers in customer engagement scenarios (for example, sales and column service). In this module, you'll learn how to define products, families, and bundles, take advantage of product properties, and define price lists. You'll also learn about pricing options for increased consistency and efficiency.

In this module, you will:

- Set up unit groups to help control how products are sold
- Create product family hierarchies that include product bundles and individual products
- Set up product pricing data by creating price lists and price list items
- Use discount lists to provide volume discount pricing

Process sales orders with Dynamics 365 Sales

You might sell different items using different processes. However, you must set up at least one sales process in Microsoft Dynamics 365 Sales. But you can set up other processes to match how your business works. Use sales order processing to automate your organization. Create and manage orders and support different sales processes such as creating and managing quotes, and working with orders, and invoices.

In this module, you will:

- Define quote records for opportunity records
- Work a quote through its entire lifecycle
- Add and revise quote product line items
- Deliver quotes to customers

Manage relationships with relationship selling in Dynamics 365 Sales

Selling today is about building long-standing relationships with customers. Customers should see you as a trusted advisor to whom they can turn when they need guidance. Building relationships is about knowing who your customers are, what they need, and when to engage with them. Microsoft Social Engagement and LinkedIn Sales Navigator are examples of applications that you can integrate with Dynamics 365 to build these relationships. Additionally, knowing which sales play to execute based on specific situations and understanding the overall health of a customer's relationship with your organization can help to increase your volume and quantity of sales.

In this module, you will:

- Discover best practices
- Work with sales playbooks
- Manage relationship health with Sales Insights
- Recognize features of Sales Navigator

Analyze Dynamics 365 sales data

Microsoft Dynamics 365 has multiple analytical options to help organizations drive business decisions that are based on past sales numbers and trends. For example, organizations can define custom views that show specific types of data, use charts to drill into more details about different sales-related records, or even analyze data by using external tools like Microsoft Excel and Microsoft Power BI.

In this module, you will:

- Review analytical options
- Describe searching tools
- Utilize Power BI to view data
- Analyze data

Define and track individual goals in Dynamics 365 Sales and Customer Service

Define and track your customer service related goals including identifying metrics.

In this module, you will:

- Create and manage individual goals
- Use Parent and Child goals
- Monitor goal progress

Use goal metrics in Dynamics 365 Sales and Customer Service

Identify customer service metrics, creating goal metrics, and work with roll-up columns and queries.

In this module, you will:

- Determine with metrics are needed to build efficient customer service goals
- Modify Fiscal Year settings to align goal progress
- Define Goal Metrics for an Organization
- Create custom Roll-up columns and Queries