

Sales for Dynamics 365

Course Level: 100

Use Sales for Dynamics 365 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 the marketing lead and sales opportunity workloads.

DYNAMICS 365
UNIVERSITY 

Break Return Time:
1:20 PM



Use data from only one level away

Display information from parent entity, cannot display fr

Search one record type at a time

Will only export up to 10,000 records

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At A Glance: Sales for Dynamics 365

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

Default record types, processes and process flows for Marketing Leads, Campaigns, and Opportunity Management.



Register

Register for Sales for Dynamics 365 today!

[Click to Register.](#)

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 University CRM Boot Camp is recommended

Key Takeaways

This Training Will Allow You To:

- Understand the default record types for Marketing Lead and Sales Opportunity Management
- Understand the built-in processes and process flows for Marketing Lead and Sales Opportunity Management



DAY 1



DAY 2



DAY 3



DAY 4



DAY 5

MARKETING

Sales App: Marketing Area

- Marketing Automation
- Marketing in the Sales Process

Lead Managements

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

Marketing Lists

- Using Marketing Lists
 - Static Lists
 - Dynamics Lists
- ### Email Templates
- Personal vs. System
 - Entity Specific vs. Global
 - Email Templates and Marketing Lists

Campaign Management

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



DAY 1



DAY 2



DAY 3



DAY 4



DAY 5

SALES

Sales Overview

Opportunity Management

- Opportunity Close Process Flow
- Creating Opportunities
- Closing Opportunities

Sales Order Processing

- Quotes, Orders and Invoices
- Tracking Competitors
- Incorporating Sales Literature
- Sales Territories

Product Catalog

- Benefits
- Components
 - Unit Groups
 - Products
 - Price Lists

Goals

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

Sales AI

- Relationship Assistant
- Email Engagement
- Auto-Capture
- Intelligence Configuration

Playbooks

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

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