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software skills training

Dynamics 365 Sales – Beginner

Course Overview – 1-day course

Introduction & Overview of Dynamics 365

This course is designed for post Dynamics 365 implementation. The more the user understands the many apps and how they integrate with each other the more they will get out of Dynamics 365 and the higher your Return on Investment.

We discuss the overall Dynamics 365 suite of apps with a focus on Sales.

About Dynamics 365

- Course Objectives
- How the course is organised
- What is Dynamics 365
- Suite of apps
- Dynamics 365 in the Workplace

Detailed Content

Intro to Dynamics 365

About Dynamics 365
What is Dynamics 365?

Intro to Dynamics 365 Sales

What is Dynamics 365 Sales?
Different subscriptions of Dynamics 365 Sales
Different apps
Differences between your organisation and the training environment

Basic concepts of Dynamics

Understanding Tables (entities), Columns (fields), Rows (records), Relationships, Dashboards, Views and Forms

Core Tables

Understanding Leads, Opportunities, Accounts, Contacts, and Competitors

Opening the Sales app

How to find the app on the Dynamics home page
How to pin the app
How to find the app on the Office 365 home page

Starting with dashboards

Selecting dashboards to view
Viewing charts to understand your data
Using charts to view and filter records
Setting dashboards as the default

Navigating with the left menu

Viewing entities and views
Navigating between work areas
Viewing app settings
Finding more help and support
Using the Recent menu items
Pinning items to the menu
Expanding and collapsing the menu

Navigating with the top menu

How to open other apps from Sales
Viewing your Account Manager
Finding help and documentation
Adjusting personalisation settings
Adjusting time zone settings
Adjusting number formatting
Adjusting toast notification display time settings
Creating new meeting appointment from the quick create menu
Using the assistant to view upcoming activities
Using Task Flows to update a meeting activity

The Sales Process

Understanding the Sales process in Dynamics 365

Working with Leads

Creating a new lead
Updating Lead details
Understanding Business Process Flows in Dynamics 365
Exploring the Lead to Opportunity process
Completing stages of the process
Sharing a record
Reassigning a record

Working with Views

Selecting a view
Using the Filter to see what the view is
Changing the view
Making a View the default personal view
Using charts in a view
Using charts to filter a view

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Leads to Opportunities

Understanding the Lead to Opportunity process
Creating phone call activity
How to use the Timeline records
Editing and closing an activity
Creating a Post
Understanding @mentions and #records in Posts
Viewing your user's record
How to Filter a Timeline
Creating Notes with rich text formatting
Attaching files to Notes
How to disqualify a Lead
How to qualify a Lead
What happens to a Lead record
Understanding what records get created when qualified

Working with Opportunities

Understanding Contact and Account records
Updating Contact and Account records
Adding Stakeholders to an Opportunity record
Understanding Competitor records
Adding Competitors to an Opportunity
Capturing further sales information
Progressing through the Sales process
Adding Sales team members to an Opportunity
Updating Sales team member's roles
Viewing Opportunities that you are a member of

Prices and Products

Understanding Dynamics 365 Product catalogues
Understanding Unit Groups, Products, Price lists and Discount lists
Viewing a Product hierarchy
Viewing a Price List
Viewing a Discount List
Adding price lists and products to an Opportunity
Applying manual discounts to a product and total

Working with Quotes

Creating a new Quote
Updating details of a quote
Activating a Quote
Revising a Quote
Deleting products from a Quote
Reactivating a Quote
Exporting a quote to PDF
Saving a Quote to SharePoint
Finding Quotes in the left menu

Working with Quotes and Invoices

Converting Quotes to Orders
Fulfilling an Order
Creating an Invoice
Updating details on an Invoice
Confirming an Invoice
Sending an Invoice by Email
Marking an Invoice as Paid

Marketing in Sales

Understanding Marketing Lists and Campaigns
Understanding Quick Campaigns
Creating a Dynamic Marketing List
Creating a Quick (email) Campaign
Managing campaign responses
Creating a Quick Campaign from a view

Using Search

Using Quick find within a view
Using wildcards to search
Filtering a View
Creating filtering queries
Clearing a filter
Changing personalisation setting for global search
Using Categorised Search
Using Relevance Search
Using Advanced Find
Creating Advanced Find queries
Viewing Advanced Find results
Exporting Advanced Find results to Excel
Creating Personal Views with Advanced Find

Dynamics 365 Sales and Excel

Opening Views in Excel Online
Creating new records using Excel Online
Exporting records to Excel

Dynamics 365 Sales and SharePoint

Understanding Dynamics 365 and SharePoint
Creating new documents for a Dynamics 365 Sales record
Viewing documents on SharePoint

Dynamics 365 Sales and Outlook

Understanding integration between Sales and Outlook
Sending an email from Sales
Using the Microsoft Dynamics 365 App for Outlook
Tracking emails in Dynamics 365
Marking emails as regarding a Dynamics 365 Sales record
Creating activities in Outlook
Creating a new Lead in Outlook

Dynamics 365 Sales and Microsoft Teams

Understanding integration between Sales and Microsoft Teams
Sharing a record to a Teams channel
Adding the Dynamics 365 Sales app to the Microsoft Teams app menu
Adding the Dynamics 365 Sales app to a Teams channel
Adding the Dynamics 365 Sales Record or View to a Teams channel

Demonstration of Dynamics 365 for phones and tablets