Microsoft Dynamics 365 Sales

Module 1: Sales Overview
In this module students will learn the basics of sales in Dynamics 365. They will install and configure the application, as well as learn about security roles, key terms, and the data model.

Lessons
Sales overview
Configuring Sales
Module summary
After completing this module, students will be able to:

Install and configure the sales application
Identify common sales scenarios

Module 2: Working with Opportunities
In this module students will learn how to manage customer data records, use built-in sales tools, and take a lead to an opportunity.

Lessons
Manage customers
Working with opportunities
Embedded intelligence
Playbooks
Integrated sales tools
Module summary
After completing this module, students will be able to:
Create customer records
Use sales tooling

Module 3: Quotes to Orders
In this module students will learn how to use quotes and orders to further use Dynamics 365 for Sales to manage sales opportunities to closed deals.

Lessons
Order processing overview
Manage product catalog
Create and manage quotes
Create and manage orders and invoices
Module summary
After completing this module, students will be able to:
Create and use the product catalog
Add quotes to opportunities
Complete a sale with an order

Module 4: Sales Analytics and Insights
In this module students will learn how to create and use goals, integrate with PowerBI, and enable Sales AI.

Lessons
Overview
Power BI
AI for Sales
Modules summary
After completing this module, students will be able to:
Create and use goals
Integrate with PowerBI
Enable Sales AI functionality