Course Syllabus

QGate

Specialists in Microsoft Dynamics 365

Introduction to Microsoft Dynamics 365 Sales

Course objectives

This course focuses on introducing users to the basic concepts behind the sales process and the use of Microsoft Dynamics 365 Sales to maximise customer engagement for an organisation. Users will be taken on a tour of different aspects of the system, through the process of creating different records, editing those records and following through the business process from lead to opportunity and from opportunity to order. Information describing the creation of quotes, sales orders and invoices is included, as well as the basic use of system dashboards and the creation of personal dashboards.

Each unit comes with a set of tasks that can be used to gain experience creating information within the system as well as quizzes to test basic learner progress. The topics this course covers include:

- The main concepts behind the use of Dynamics 365 Sales
- Basic layout and organisation of Dynamics 365 for Customer Engagement
- The creation and management of Accounts
- The creation and management of Contacts and their relationship to Account records
- Setting up and qualifying Business Leads
- The Business Process from Opportunity to Order
- The creation and use of Activities to track progress
- Competitor management
- Sales Order processing
- The use of Dashboards to monitor progress

Who this course is for

- Users new to Microsoft Dynamics 365 Sales
- Users looking to refresh their knowledge of Dynamics 365

Duration

- 4 hours

Delivery options

- Via remote sessions
- On site
- As a ClickLearn portal
- ClickLearn source files
- As LMS compliant SCORM files

Assessment methods

- Tasks and exercises
- Quiz questions

Language

- This course can be made available in alternative languages upon request*

Customisable

- This course can be customised to suit your business needs through our authoring services*

*Additional charges apply

Module breakdown

Introduction to Microsoft Dynamics 365 Sales

- Course overview - Microsoft Dynamics 365 Sales
- Open the Sales App
- Business Processes

Learn to Navigate Microsoft Dynamics 365 Sales

- The Navigation Bar
- The Site Map
- Recent and Pinned Items
- Selecting a View
- Filtering by Initial Letter
- Filtering a View
- Searching an Entity
- Using the Categorised Search
- Using the Relevance Search
- Dynamics Field Types

Learn about Accounts in Microsoft Dynamics 365 Sales

- Exploring Account Information
- Creating and Editing a New Account Record
- Adding Contacts to an Account
- Creating a New Account Record for a Contact
- Deactivating and Reactivating an Account Record
- Create Accounts and Contacts with Quick Create
- Exploring Organisational Charts for Accounts

Learn about Contacts in Microsoft Dynamics 365 Sales

- Exploring Contact Information
- Creating a New Contact Record
- Create a Contact from a Business Card
- Editing a Contact Record
- Set a Primary Contact
- Adding Contacts to an Account
- Creating a New Account Record for a Contact
- Deactivating and Reactivating a Contact Record
- Create Accounts and Contacts with Quick Create

Learn about Leads in Microsoft Dynamics 365 Sales

- Exploring Leads Information
- Creating and Editing a New Lead
- Creating Leads from an Account
- Creating Leads Using Existing Records
- Assigning Leads to other Users or Teams
- Qualifying and Disqualifying a Lead
- Reactivate a Lead
- Explore Competitor Information
- Creating Competitor Records
- Adding Stakeholders and Competitors

Learn about Activities in Microsoft Dynamics 365 Sales

- Exploring Activities
- Schedule an Appointment or Meeting
- Creating Records of Tasks
- Creating Records of Call Information
- Sending an Email
- Scheduling a Call and Task within an Entity
- Marking an Activity as Complete
- Completing Activities on a Timeline

Learn about Opportunities in Microsoft Dynamics 365 Sales

- Exploring Opportunity Information
- Create a New Opportunity Record
- Editing and Updating the Details of an Opportunity
- Return an Opportunity to Lead Status
- Closing an Opportunity as Lost
- Re-opening a Closed Opportunity
- Developing an Opportunity
- Proposing a Business Solution

Learn about Quotes in Microsoft Dynamics 365 Sales

- Exploring Quote Information
- Adding Products and Creating Quotes from an Opportunity
- Activating a Quote
- Sending a Quote to a Customer
- Updating and Amending Quotes
- Creating a Stand Alone Quote
- Linking a Quote to an Opportunity

Learn about Completing Opportunities with Orders and Invoices in Microsoft Dynamics 365 Sales

- Exploring Order Information
- Creating an Order
- Marking an Order as Fulfilled
- Exploring Invoice Information
- Creating an Invoice
- Marking an Invoice as Billed and Paid
- Completing an Opportunity
- Closing an Opportunity as Won

Learn about Dashboards in Microsoft Dynamics 365 Sales

- Exploring System Dashboards
- Creating a Personal Dashboard
- Editing a Personal Dashboard