

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

Coming Soon

About Dynamics 365
What is Dynamics 365?
What is Dynamics 365 Sales?
Understanding where your data is stored

Customising the Sales Hub app

Explore built-in charts and dashboards
Create a custom dashboard
Create and modify views and reports
Configure format settings

Exploring the Sales Hub App

What is an app?
Exploring the Sales Hub App
Understanding the Sales process in Dynamics 365

Managing the sales process

Create Leads
Qualify Leads and convert opportunities
Manage Account or Organisation records
Track activities across the sales process

Managing products, quotes and invoices

Create products and pricelists
Create quotes and convert to invoices