

Microsoft Dynamics 365 for Sales

Dynamics 365 for Sales enables sales people to build strong relationships with their customers, take actions based on insights, and close sales faster. Use Dynamics 365 for Sales 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

Détails

- **Code** : MB-CRM-S
- **Durée** : 2 jours (14 heures)

Public

- Architectes
- Chefs de projets
- Consultants
- Consultants informatiques
- Développeurs
- Ingénieurs
- Professionnels de l'IT

Pré-requis

- it is recommended to follow the "Dynamics 365 for Customer Engagement: the basics" first.

Objectifs

Programme

Outline

- Sales Management
 - Understand the sales process
 - Lead management and qualification
 - Opportunities management and sales pipeline
 - Quote creation and templates
 - Order process management
- Set up Sales territory
- Define Sales setting
- Define lead qualification experience
- Product Management
 - Set up a product catalog (Sales and Sales Hub)
 - Create a product, a product family or bundles
 - Manage products relationships
- Create and manage price lists
- Create and manage unit group
- Set up discount list
- Translate product names
- Use properties to describe a product
- Revise, clone or retire a product
- Add editable products grid on forms
- Forecast and Goal Management
- Goal Settings
 - Create a goal
 - Create a goal metric
 - Define a goal rollup query (Sales & Sales Hub)
 - Create a forecast definition
- Dynamics 365 for Sales and GDPR

Modalités

- **Type d'action** :Acquisition des connaissances
- **Moyens de la formation** :Formation présentielle – 1 poste par stagiaire – 1 vidéo projecteur – Support de cours fourni à chaque stagiaire
- **Modalités pédagogiques** :Exposés – Cas pratiques – Synthèse
- **Validation** :Exercices de validation – Attestation de stages