

# Microsoft Dynamics 365 for Sales

| **Vendor:** Microsoft

**Duration:** 16.00 hours (2 days)

**13.0 CPD Hours**

**Rating:** ★ 4.6 (5,878 reviews)

## Course Information

**Delivery Format:** Instructor Led - Classroom

## Course Overview

This course provides students with a detailed hands-on experience of the Sales features and components of Microsoft Dynamics 365.

## About This Course

This course provides students with a detailed hands-on experience of the Sales features and components of Microsoft Dynamics 365.

## Who Should Attend

This course is intended for Sales Representatives (SR), Sales Managers and End-users who have an interest in the Sales components of Dynamics 365. Students should have an existing working knowledge of either Microsoft Dynamics 365 or Microsoft Dynamics CRM. As a minimum, students should attend the prerequisite course Introduction to Microsoft Dynamics 365

# Learning Outcomes

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## **Upon successful completion of this course, participants will be able to:**

- Understand the features and tools that exist in Microsoft Dynamics 365 for SR's and Sales Managers.
- Be familiar with the stages of the Sales Order Process in Microsoft Dynamics 365.
- Understand the fundamentals of Lead and Opportunity Management.
- Be able to track, manage, qualify Leads and convert to Opportunities and related customer records in Microsoft Dynamics 365.
- Know how to disqualify and cancel Leads, and convert Activity records to Leads and Opportunities.
- Understand how to collaborate on Opportunities with other SR's and close Opportunity records as Won and Lost.
- Be able to track Competitors and Stakeholders.
- Understand how to view Resolution Activities.
- Add Products and Write-In Products to Opportunities.
- Build and maintain a repository of Products, Product Bundles and Product Families in the Product Catalog.
- Configure Unit Groups, Price Lists and Discount Lists.
- Work with Product Properties and view a Product Hierarchy.
- Create Quotes and add Products.
- Work with the Sales Order Process to convert Quotes to Orders and Invoices.
- Fulfill Orders and manage Invoice payments.
- Explore the Sales Reports and create a custom Sales Report using the Reporting Wizard in Microsoft Dynamics 365.
- Understand the significance of Sales Goal Management and Metrics in Microsoft Dynamics 365.
- Explore the Sales Charts and Dashboards and create a custom Sales Dashboard in Microsoft Dynamics 365.

## Additional Course Details

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Nexus Humans Microsoft Dynamics 365 for Sales training program is a workshop that presents an invigorating mix of sessions, lessons, and masterclasses meticulously crafted to propel your learning expedition forward.

This immersive bootcamp-style experience boasts interactive lectures, hands-on labs, and collaborative hackathons, all strategically designed to fortify fundamental concepts.

Guided by seasoned coaches, each session offers priceless insights and practical skills crucial for honing your expertise. Whether you're stepping into the realm of professional skills or a seasoned professional, this comprehensive course ensures you're equipped with the knowledge and prowess necessary for success.

While we feel this is the best course for the Microsoft Dynamics 365 for Sales course and one of our Top 10 we encourage you to read the course outline to make sure it is the right content for you.

Additionally, private sessions, closed classes or dedicated events are available both live online and at our training centres in Dublin and London, as well as at your offices anywhere in the UK, Ireland or across EMEA.

# Frequently Asked Questions

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## **Q: What delivery options are available for Microsoft Dynamics 365 for Sales?**

We offer multiple delivery formats:

- Live Instructor-Led Classroom Online (Virtual/Live Online)
  - Traditional Instructor-Led Classroom Training (ILT)
  - On-site delivery at your offices anywhere in United Kingdom
  - Private dedicated courses customized for your team
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## **Q: How many CPD hours does this course provide?**

The 2-day Microsoft Dynamics 365 for Sales course provides up to 13.0 CPD hours of structured learning. CPD certificates can be provided upon request.

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## **Q: What is the duration of the Microsoft Dynamics 365 for Sales training?**

The training takes place over 2 day(s), with each day lasting approximately 16.00 hours including breaks for lunch and refreshments.

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## **Q: Do you provide corporate training for Microsoft Dynamics 365 for Sales?**

Yes, we provide corporate training, dedicated training, and closed classes for Microsoft Dynamics 365 for Sales. Training can take place anywhere in United Kingdom including London, Manchester, Birmingham, Edinburgh, or live online allowing teams from across United Kingdom or internationally to attend.

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## Q: Why choose Nexus Human for Microsoft Dynamics 365 for Sales?

Nexus Human is recognized as one of the leading training providers. Our trainers have won multiple awards including:

- Small Firms Best Trainer Award
- National Training Partner of the Year (Ireland) - Multiple Years
- Global Top 30 Instructor Awards (2012, 2019, 2021)
- Tech Excellence Award Nominations
- Learning Performance Institute (LPI) External Training Provider Sponsor 2024

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## Q: Are there any discount codes available?

Yes! Use discount code **PENPAL5** when booking your Microsoft Dynamics 365 for Sales training. Please note that only one discount code can be used per booking and cannot be combined with other special offers.

# Nexus Human

## Professional Training & Development

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