

**Microsoft Dynamics 365 Sales (MB-210)**

**Course Number:** MOC-MB-210  
**Duration:** 1 day

**Overview**

This official Microsoft course MB-210, Microsoft Dynamics 365 Sales training, teaches attendees how to track data against sales goals, automate best practices, learn from data, and more. Students learn how to use the automation and customization tools in MS Dynamics to be more productive and to successfully go from lead to opportunity to closed deal. This course prepares students for the [MB-210 exam](https://docs.microsoft.com/en-us/learn/certifications/exams/MB-210) for which every attendee receives a voucher.

**Prerequisites**

No prior experience is presumed.

**Materials**

All Microsoft Dynamics 365 Sales training students receive Microsoft official courseware.

For all Microsoft Official Courses taught in their entirety that have a corresponding certification exam, an exam voucher is included for each participant.

**Software Needed on Each Student PC**

Attendees will not need to install any software on their computer for this class. The class will be conducted in a remote environment that Accelebrate will provide; students will only need a local computer with a web browser and a stable Internet connection. Any recent version of Microsoft Edge, Mozilla Firefox, or Google Chrome will be fine.

**Objectives**

* Install and configure the application
* Identify common sales scenarios
* Complete a sales cycle
* Configure product catalog
* Manage customer records
* Utilize analytics tools with customer data

**Outline**

* Configure Dynamics 365 Sales
  + Configure organization and management settings
* Manage Leads and Opportunities with Dynamics 365 Sales
  + Manage leads with Dynamics 365 Sales
  + Manage opportunities with Dynamics 365 Sales
* Manage Orders and the Product Catalog with Dynamics 365 Sales
  + Manage and organize your product catalog with Dynamics 365 Sales
  + Process sales orders with Dynamics 365 Sales
  + After completing this module, you will be able to:
  + Create and use the product catalog.
  + Add quotes to opportunities.
  + Complete a sale with an order.
* Manage Goals with Dynamics 365 Sales
  + Define and track individual goals with Dynamics 365 Sales
  + Use goal metrics in Dynamics 365 Sales
  + After completing this module, you will be able to:
  + Use rollup columns to define sales metrics.
  + Track individual goals for sales and teams.
* Analyze Dynamics 365 Sales Data
  + Analyze data in Dynamics 365 Sales
  + Analyze data with Power BI
  + After completing this module, you will be able to:
  + Analyze sales data using out-of-the-box Dynamics 365 tools
  + Configure charts and dashboards to view sales data
  + Use Power BI and Power BI template apps to analyze data
* Work with Dynamics 365 Sales Insights
  + Configure Sales Insights
  + After completing this module, you will be able to:
  + Set up and configure Sales Insights
  + Work with Assistant studio
  + Configure productivity intelligence
  + Configure Connection insights
  + Configure predictive models
* Create Surveys with Dynamics 365 Customer Voice
  + Create a survey project with Dynamics 365 Customer Voice
  + Create surveys with Dynamics 365 Customer Voice
  + Send Dynamics 365 Customer Voice surveys
* Conclusion