Dynamic 365 Sales

Zetlan Technologies

Online Course

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Dynamic 365 Sales

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Course Modules

1: Introduction to Dynamics 365 Sales:

- Overview of Microsoft Dynamics 365 ecosystem
- Udstd the role of Dynamics 365 Sales in cus rltn mgmt (CRM)

2: Navigating Dynamic 365 Sales:

- User interface and navigate withn Dynamics 365 Sales app
- Accessing and managing records, views, and dashboards

3: Lead Management:

- Creating and managing leads
- Qualifying and converting leads into opportunities

4: Opportunity Management:

- Creating and managing opportunities
- Sales process customization and stages

5: Account and Contact:

- Managing customer accounts and contacts
- Relationship management and customer engagement

6: Product and Price List Management:

- Managing products and services
- Setting up price lists and discount structures

7: Quote and Order Management:

- Creating and managing quotes
- Order processing and fulfillment

8: Sales Analysis and Reporting:

- Generating reports and dashboards
- Analyzing sales performance metrics

9: Sales Automation:

- Workflow automation
- Business process flows and automation rules

10: Integration with Office 365:

- Connecti Dynamics 365 Sales with Microsoft Office 365 tools
- Email integration and communication tracking

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11: Mobile Sales Productivity:

- Using mobile apps for sales on-the-go
- Mobile access to customer data and insights

12: Artificial Intelligence in Sales:

- AI-driven insights and predictive analytics
- Using AI for lead scoring and forecasting

13: Customization and Configuration:

- Customizing forms, views, and fields
- Configuring business rules and processes

14: Security and Access Control:

- Managing user roles and permissions
- Securing sensitive data within Dynamics 365 Sales

15: Integration with Power Platform:

- Leveraging the Power Platform for additional customization
- App development

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LEARN REMOTELY!!

The efficiency of online learning in terms of time management, flexibility, and the ability to access resources anytime, anywhere can be compelling.

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