Dynamics 365 for Sales: 3-Hr Implementation

Dynamics 365 Sales enables salespeople to build strong relationships with their customers, take actions based on insights, and close deals faster. Use Dynamics 365 Sales to keep track of your accounts and contacts, nurture your sales from lead to order, and create sales collateral. You can also create marketing lists and campaigns, and follow service cases associated with specific accounts or opportunities.

Agenda

Dynamics 365 Sales Introduction

- Learn the basics for Dynamics 365 Sales
- Understand the sales process
- Import nand Export Data to Excel
- Search for your Data
- Assign or share records
- Export Sales records to PDF
- Work with views.

Install and Configure

- System Requirements
- Use Sales Hup App
- Customize your Sales App
- Upgrade

Deliverables:

3-hour implementation assistance includes:

- 1 hour of Dynamics 365 for Sales Training
- 1 hour of Dynamics 365 Data Migration Training
- 1 hour of Dynamics 365 Customization Training

Note: A minimum of 5 Dynamics 365 for Sales licenses purchased required through us.