

### **AB-210T00-A: Accelerate sales pipelines with AI in Dynamics 365**

OEM: Microsoft • Duration: 4 Days (32 hrs) • Code: AB-210T00-A

#### **COURSE MODULES & TOPICS**

### **Configure Dynamics 365 Sales for AI-powered selling**

#### **Transform customer experiences with AI in Dynamics 365 apps**

- Introduction
- Dynamics 365 customer experience apps in an organization's journey
- Work with the other Dynamics 365 apps as part of a customer engagement solution
- Explore AI components in Dynamics 365 apps
- Use AI responsibly with Dynamics 365
- Module assessment
- Summary

#### **Discover Dynamics 365 Sales as an AI-powered sales solution**

- Introduction
- Design an AI-driven sales strategy
- Navigate in Dynamics 365 Sales
- Manage customers
- Copilot in Dynamics 365 Sales
- Use agents in Dynamics 365 Sales
- Module assessment
- Summary

#### **Set up and configure Dynamics 365 Sales**

- Introduction
- Prepare for your Dynamics 365 Sales deployment
- Set up security roles
- Set up and configure the application
- Configure collaboration features
- Configure Copilot in Sales
- Set up AI features in the Dynamics 365 AI Hub
- Configure intelligence features
- Configure the sales accelerator
- Module assessment
- Summary

## Generate and qualify leads using AI in Dynamics 365 Sales

### Nurture and generate leads in Dynamics 365 Sales

- Introduction
- Explore leads in Dynamics 365 Sales
- Manage the lead lifecycle
- Prioritize leads with predictive scoring
- Use Copilot with leads
- Module assessment
- Summary

### Qualify leads using the Sales Qualification Agent in Dynamics 365 Sales

- Introduction
- Get started with the Sales Qualification Agent
- Configure the Sales Qualification Agent
- Troubleshoot and monitor the Sales Qualification Agent
- Interpret agent actions on leads
- Knowledge check
- Summary

### Engage with customers through text messages in Dynamics 365 Sales

- Introduction
- Set up the text messaging provider
- Edit phone numbers
- Add a text message option to custom forms
- Manage text message conversations
- Module assessment
- Summary

## Win deals with AI-powered sales execution in Dynamics 365 Sales

### Set up the product catalog in Dynamics 365 Sales

- Introduction
- Explore the product catalog
- Define products, families, and bundles
- Configure price lists and discounts
- Manage catalog settings
- Knowledge check
- Summary

### Manage opportunities and process sales orders in Dynamics 365 Sales

- Introduction
- Explore opportunities in Dynamics 365 Sales

- Manage the opportunity lifecycle
- Add products and configure pricing
- Use Copilot with opportunities
- Process quotes, orders, and invoices
- Knowledge check
- Summary

## **Close deals using AI agents in Dynamics 365 Sales**

- Introduction
- Get started with opportunity AI agents
- Configure the Sales Opportunity Agent
- Configure the Sales Close Agent
- Monitor and interpret agent insights
- Knowledge check
- Summary

## **Analyze sales performance using AI, forecasting, and dashboards in Dynamics 365 Sales**

- Introduction
- Explore the Sales Research Agent
- Configure the Sales Research Agent
- Configure predictive sales forecasting
- Build and manage sales forecasts
- Explore dashboards and reporting tools
- Set and track sales goals
- Module assessment
- Summary

## **Extend Dynamics 365 Sales with AI and Power Platform tools**

### **Get started with the Dynamics 365 Sales mobile app**

- Introduction
- Deploy the mobile app
- Use the mobile app
- Manage records
- Customize form views
- Set up push notifications
- Knowledge check
- Summary

### **Use Microsoft 365 services with model-driven apps and Microsoft Dataverse**

- Introduction
- Set up mailboxes
- Server-side sync
- Document management options

- Document management
- Deploy the app for Outlook
- Set up Dynamics 365 App for Outlook
- Integrate with Microsoft Teams
- Check your knowledge
- Summary

## **Extend Dynamics 365 apps with Power Platform and Copilot Studio**

- Introduction
- Extend Dynamics 365 with Copilot Studio agents
- Evaluate AI data connectivity options with MCP
- Streamline workflows with Power Automate
- Embed custom experiences with Power Apps
- Surface contextual insights with Power BI
- Enable customer portals with Power Pages
- Module assessment
- Summary