## Contents

# 1 MB-210 - Microsoft Dynamics 365 Sales

- **Download Latest Student Handbook and AllFiles Content**
- **Are you a MCT?** - Have a look at our GitHub User Guide for MCTs
- **Need to manually build the lab instructions?** - Instructions are available in the MicrosoftLearning/Docker-Build repository

## 1.1 What are we doing?

- To support this course, we will need to make frequent updates to the course content to keep it current with the Dynamics 365 and Power Platform services used in the course. We are publishing the lab instructions and lab files on GitHub to allow for open contributions between the course authors and MCTs to keep the content current with changes in the Business Applications platform.
- We hope that this brings a sense of collaboration to the labs like we've never had before - when Dynamics 365 and the Power Platform changes and you find these changes first during a live delivery, go ahead and make an enhancement right in the lab source. Help your fellow MCTs.

## 1.2 How should I use these files relative to the released MOC files?

- The instructor handbook and PowerPoints are still going to be your primary source for teaching the course content.
- These files on GitHub are designed to be used in conjunction with the student handbook, but are in GitHub as a central repository so MCTs and course authors can have a shared source for the latest lab files.
- It will be recommended that for every delivery, trainers check GitHub for any changes that may have been made to support the latest Azure services, and get the latest files for their delivery.

## 1.3 What about changes to the student handbook?

- We will review the student handbook on a quarterly basis and update through the normal MOC release channels as needed.

## 1.4 How do I contribute?

- Any MCT can submit a pull request to the code or content in the GitHub repro, Microsoft and the course author will triage and include content and lab code changes as needed.
- You can submit bugs, changes, improvement and ideas. Find a new Dynamics 365 or Power Platform feature before we have? Submit a new demo!

## 1.5 Notes

### 1.5.1 Classroom Materials

## 1.6 It is strongly recommended that MCTs and Partners access these materials and in turn, provide them separately to students. Pointing students directly to GitHub to access Lab steps as part of an ongoing class will require them to access yet another UI as part of the course, contributing to a confusing experience for the student. An explanation to the student regarding why they are receiving separate Lab instructions can highlight the nature of an always-changing cloud-based interface and platform. Microsoft Learning support for accessing files on GitHub and support for navigation of the GitHub site is limited to MCTs teaching this course only.

## 1.7 title: Online Hosted Instructions permalink: index.html layout: home

# 2 Content Directory

Hyperlinks to each of the lab exercises and demos are listed below.

## 2.1 Labs

{% assign labs = site.pages | where_exp:"page", "page.url contains '/Instructions/Labs'" %} | Module | Lab | | --- | --- | {% for activity in labs %}| {{ activity.lab.module }} | [{{ activity.lab.title }}{% if activity.lab.type %} - {{ activity.lab.type }}{% endif %}](/home/ll/Azure_clone/Azure_new/MB-210-Dynamics365forSales/{{ site.github.url }}{{ activity.url }}) | {% endfor %}

## 2.2 Demos

## 2.3 {% assign demos = site.pages | where_exp:"page", "page.url contains '/Instructions/Demos'" %} | Module | Demo | | --- | --- | {% for activity in demos %}| {{ activity.demo.module }} | [{{ activity.demo.title }}](/home/ll/Azure_clone/Azure_new/MB-210-Dynamics365forSales/{{ site.github.url }}{{ activity.url }}) | {% endfor %}

## 2.4 demo: title: 'Demo 2.1: Customize the sales process' module: 'Module 2: Manage customers, leads, and opportunities'

# 3 Module 2: Manage customers, leads, and opportunities

## 3.1 Instructor Demo – Customize the sales process

## 3.2 Scenario

World Wide Importers (WWI) is looking to formalize their sales process to increase revenue and the give leadership stronger forecasting abilities. You are a functional consultant configuring Dynamics 365 for Sales for World Wide Importers. In this lab, you will create a business process flow to guide the sales process experience for users.

## 3.3 Exercise 1 – Customize Business Process Flow

### 3.3.1 Task 1 – Create Business Process Flow

In this task, you will create a new Business Process Flow from the Opportunity Sales Process and then test the new BPF.

1. Navigate to https://make.powerapps.com.
2. Ensure that you are in the **Contoso** environment.

- This demo will make configuration changes to the Dynamics 365 organization. Please ensure that this demo is only completed by an MCT.

3. Select **Solutions** and click on the **Default Solution**.
4. Locate the **Search** box in the top left corner of the page and click on the **All** drop-down.
5. Select **Process.**
6. Type **Opportunity** in the search box.
7. Locate and open the **Opportunity Sales Process**.
8. Click **Deactivate**.
9. Confirm deactivation.
10. Click **Save As**.
11. A new browser window will open the copied Business Process Flow and the new process will be named **Opportunity Sales Process (Copy)**. Click on the **Show Details** button located next to the name.
12. Change the Process **Name** to **Opportunity Sales Process V2**.
13. Click **Save**.
14. Drag **Condition** from the **Components** tab and place it between the **Qualify** and **Develop** stages.
15. Select the **Condition**, go to the **Properties** tab, and enter **Check Budget** for **Display Name**.
16. Go to **Rule 1** and select **Budget Amount** for **Field**.
17. Select **Is Greater than or Equals to** for **Operator**.
18. Select **Value** for **Type**.
19. Enter **1000000** for **Value** and click **Apply**.
20. Click **Save**.

21. A new stage will be added to Business Process flow.
22. Select the new stage and select the **Properties** tab.
23. Enter **Thank You** for **Display Name** and click **Apply.**
24. Click the **Details** button of the **Thank You** stage.
25. Select the **New Step** inside the **Thank You** stage.
26. From the **Components** tab and select **Send Thank You Note** for **Data Field**.
27. Check the **Required** check box and click **Apply**.
28. Click **Save**.
29. Click **Activate**.
30. Confirm the activation.
31. Close the Business process Flow editor.
32. Close the Opportunity Sales Process window.
33. Click **Done**.

### 3.3.2 Task 2 – Add Business Process Flow

In this task, you will remove the old business process flow from your Sales Hub application and add the V2 business process flow.

1. Navigate https://web.powerapps.com/
2. Make sure you are **NOT** in **Default** environment.
3. Select **Apps**.
4. Select the **Sales Hub** application and click **Edit**.
5. The application designer will open. Select the **Business Process Flow** tile.
6. From the **Components** tab uncheck the **Opportunity Sales Process** checkbox and check the **Opportunity Sales Process V2** checkbox.
7. Click **Save**.
8. Click **Publish**.
9. Close the application designer.

### 3.3.3 Task 3 – Test Business Process Flow

1. Navigate https://web.powerapps.com/
2. Make sure you are **NOT** in **Default** environment.
3. Select **Apps**.
4. Click to open the **Sales Hub** application.
5. Click **Site Map** and select **Opportunities**.
6. Click **+ New**.
7. Enter **Test Opportunity** for **Topic**.
8. Select **Jane Doe** for **Contact**.
9. Enter **900000** for **Budget Amount** and click **Save**.
10. Click Process and select Switch Process.
11. Select the **Opportunity Sales Process V2** process and click **OK**.
12. The Business Process Flow should have 4 stages, **Qualify**, **Develop**, **Propose**, and **Close**. The Thank You stage will not be part of the process if the Budget Amount is less than $1,000,000.
13. Change the **Budget Amount** to 1000000.

14. The Business Process Flow should have 5 stages, **Qualify**, **Thank You**, **Develop**, **Propose**, and **Close**.
15. Click on the **Qualify** Stage.
16. Click **Next Stage**.
17. The process should move to the **Thank You** stage. Click **Next Stage**.
18. The process should not move to the next stage until the **Send Thank You** step is marked complete.
19. Check the **Mark Complete** checkbox and click **Next Stage**.
20. The process should now move to the **Develop** stage.

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### 3.4 demo: title: 'Demo 4.1: Sales Insights' module: 'Module 4: Integrate components with Dynamics 365 Sales'

# 4 Module 4: Integrate components with Dynamics 365 Sales

## 4.1 Instructor Demo – Sales Insights

## 4.2 Scenario

One of the primary selling points of Dynamics 365 Sales to World Wide Importers (WWI) was the integration of Artificial Intelligence (AI) to make sales data immediately actionable for their sales users. You are a functional consultant configuring Dynamics 365 Sales for World Wide Importers. You have been tasked with enabling out of the box Insights functionality so that users can use tools such as the relationship assistant, productivity cards and email intelligence. In this lab, you will enable Sales Insights and explore the settings.

**Important Note:** This lab will provide you with an actual Dynamics 365 tenant and licenses for the Power Platform applications you will be using in this course. You will only be provided with one tenant for the practice labs in this course. The settings and actions you take within this tenant do not roll-back or reset, whereas the virtual machine you are provided with does reset each time you close the lab session. Please be aware that Dynamics 365 is evolving all the time. The instructions in this document may be different from what you experience in your actual Dynamics 365 tenant. It is also possible to experience a delay of several minutes before the virtual machine has network connectivity to begin the labs.

## 4.3 Exercise 1 – Sales Intelligence

### 4.3.1 Task 1 – Review Personal Configuration

1. Go to your **Dynamics 365 Sales Hub** application.
2. Click on the **Sales** button at the bottom of the left menu and click on the **Sales Insights settings** button.
3. Examine what is available by default.

### 4.3.2 Task 2 – Enable and explore Sales Insights

In this task, you will enable Relationship Assistant, Email Engagement, and Auto Capture.

1. In **Sales Insights settings**, confirm that you are on the **Overview tab.**
2. Scroll down to the **Terms of service** section and click the **I agree** button.
3. Assistant and Auto capture should now have **Manage >** links next to their tabs.
4. Click on the **Manage** button next to Assistant.
5. You will be taken to the **Relationship Assistant** tab. Review and explore the available cards.
6. Select the **Recent Meeting** card and explore the card details. Toggle the card to **Off.** This card is now disabled.
7. Click **Save.**
8. Return to the list of available cards. **Recent Meeting** should no longer be visible at the top of the list.

9. Return to the Overview tab.
10. On the Overview tab, click **Manage >** next to Auto capture.
11. Confirm Auto capture is enabled via the toggle.

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### 4.4 lab: title: 'Lab 1.1: Validate lab environment' module: 'Module 1: Configure Dynamics 365 Sales'

# 5 Module 1: Configure Dynamics 365 Sales

## 5.1 Practice Lab 1.1 - Validate lab environment

## 5.2 Scenario

World Wide Importers (WWI) is looking to formalize their sales process to increase revenue and the give leadership stronger forecasting abilities. You are a functional consultant configuring Dynamics 365 for Sales for World Wide Importers. In this lab, you will install the Sales application and install sample data.

In this Module 0 lab, you will validate that your classroom tenant is working as expected. You will access your individual credentials, record your "alias", and open the Dynamics 365 model-driven application that we will be using throughout the course.

**Important Note:** This lab will provide you with an actual Dynamics 365 tenant and licenses for the Power Platform applications you will be using in this course. Please be aware that the Power Platform is evolving all the time. The instructions in this document may be different from what you experience in your actual tenant. It is also possible to experience a delay of several minutes before the virtual machine has network connectivity to begin the labs.

## 5.3 Exercise 1 - Access the Dynamics 365 application

### 5.3.1 Task 1 – Log into the Power Platform admin center

1. Access https://admin.Powerplatform.microsoft.com and log in with your user credentials.
2. Record your user credential up to the **@** symbol on a scratch piece of paper or in Notepad. This will be your lab alias that you will use to differentiate the data you create within the shared Dynamics 365 organization.

**Important:** Please be aware that this tenant and the Dynamics 365 organization will be shared with the other students in your classroom, like employees would share a tenant when using the Dynamics 365 instance belonging to their organization. Do not use any PII (personally identifiable information) when creating records. It is also good practice to use your username prefix (ex., **mollyc**) in front of all records, data, apps, flows, etc. you create.

3. Feel free to explore the Power Platform admin center but **do not make any changes.**

### 5.3.2 Task 2 – Access the Dynamics 365 application

1. Expand the grid button at the top left of the screen, directly to the left of **Power Platform admin center.** Select **Dynamics 365.**
2. Select the **Edit** button. You will open the Contoso environment in the **Power Platform admin center.**
3. From the list of available Dynamics 365 apps, select **Sales Hub.**
4. Spend a few minutes exploring the application.

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### 5.4 lab: title: 'Lab 2.1: Manage Customers' module: 'Module 2: Manage customers, leads, and opportunities'

# 6 Module 2: Manage customers, leads, and opportunities

## 6.1 Practice Lab 2.1 – Manage customers

## 6.2 Scenario

World Wide Importers (WWI) is looking to formalize their sales process and address the backlog of untouched leads imported by the marketing team from trade shows and campaigns. You are a sales analyst for the Dynamics 365 Sales implementation at World Wide Importers and have been asked to assess and update lead records so the executive team can work from an accurate pipeline report in the upcoming leadership meeting. In this lab, you will update lead records and qualify, disqualify and reactivate lead records.

**Important Note:** This lab will provide you with an actual Dynamics 365 tenant and licenses for the Power Platform applications you will be using in this course. You will only be provided with one tenant for the practice labs in this course. The settings and actions you take within this tenant do not roll-back or reset, whereas the virtual machine you are provided with does reset each time you close the lab session. Please be aware that Dynamics 365 is evolving all the time. The instructions in this document may be different from what you experience in your actual Dynamics 365 tenant. It is also possible to experience a delay of several minutes before the virtual machine has network connectivity to begin the labs.

## 6.3 Exercise 1 – Manage Customers

### 6.3.1 Task 1 – Creating Leads

In this task, you will create three leads, one without company information and two with company information.

1. Go to your **Dynamics 365 Sales Hub** application.
2. Navigate to the left menu and explore the options available.
3. Select **Leads** from the **Sales** section of the left menu.
4. Click **+ New**.
5. Enter [**my prefix**] **Lead Without Company** for **Topic**, **Jane** for **First Name**, **Doe** for **Last Name**, and click **Save**.
6. Click **+ New** again.
7. Enter [**my prefix**] **Lead with Company** for **Title**, **Jon** for **First Name, Doe** for **Last Name**, **Doe Inc.** for **Company**, and click **Save**.
8. Click **+ New** one more time.
9. Enter [**my prefix**] **Another Lead** for **Title**, **Jack** for **First Name**, **Smith** for **Last Name, Test Inc**. for **Company**, and click **Save**.

## 6.4 Exercise 3 – Lead Qualifications

In this exercise, you will qualify/disqualify leads and see what records will be created when a lead goes through the qualification process.

### 6.4.1 Task 1 – Qualify Lead Without Company Information

1. Go to your **Sales Hub** application.
2. Select **Leads**.
3. Locate **Lead Without Company** and open it.
4. Click **Qualify** from the top menu.
5. The lead will be **Qualified**, and you will be taken to a new Opportunity record created from the qualified **Lead**.
6. Locate the **Contact** field. You find that **Jane Doe** is now a **Contact** record.

7. Locate the **Account** field. The field will be empty.
8. Click **Save.**

#### 6.4.2 Task 2 – Qualify Lead with Company

1. Go to your **Sales Hub** application.
2. Select **Leads**.
3. Locate **Lead with Company** and open it.
4. Click **Qualify** from the top menu.
5. The lead will be **Qualified**, and you will be taken to a new Opportunity record created from the qualified **Lead**.
6. Locate the **Contact** field. You find that **Jon Doe** is now a **Contact** record.
7. Locate the **Account** field. You will find that **Doe Inc.** is now an **Account** record.

#### 6.4.3 Task 3 – Disqualify Lead

1. Go to your **Sales Hub** application.
2. Select **Leads**.
3. Locate **Another Lead** and open it.
4. Click **Disqualify** and select **No Longer Interested**.
5. The Lead will be Disqualified, the status will change to No Longer Interested, and the record will become Read Only.

#### 6.4.4 Task 4 – Reactivate Lead

1. Go to your **Sales Hub**,application.
2. Click on the **Site Map** button and select **Leads**.
3. The Lead you disqualified is no longer in the **My Open Leads** view. Change the View to **Closed Leads**.
4. Locate **Another Lead** and open it. (Ensure the lead has your prefix.)
5. Click **Reactivate Lead**.
6. The Lead will be reactivated, the status will change to New, and the record will become editable.

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### 6.5 lab: title: 'Lab 3.1: Make a playbook' module: 'Module 3: Process sales orders'

# 7 Module 3: Process sales orders

## 7.1 Practice Lab 3.1 – Make a playbook

## 7.2 Scenario

You are a functional consultant configuring Dynamics 365 for Sales for World Wide Importers. The sales department has recently finalized a set of best practices based on past experiences and analysis of successful sales. As part of the best practices, each opportunity must have a set of related activities required to be completed. The set of specific activities to be completed depending on the size of the opportunity. In this lab, you will create playbook templates and activities and use the playbooks within the application.

**Important Note:** This lab will provide you with an actual Dynamics 365 tenant and licenses for the Power Platform applications you will be using in this course. You will only be provided with one tenant for the practice labs in this course. The settings and actions you take within this tenant do not roll-back or reset, whereas the virtual machine you are provided with does reset each time you close the lab session. Please be aware that Dynamics 365 is evolving all the time. The instructions in this document may be different from what you experience in your actual Dynamics 365 tenant. It is also possible to experience a delay of several minutes before the virtual machine has network connectivity to begin the labs.

## 7.3 Exercise 1 – Create Playbook Template

In this exercise, you will create two Playbook Templates: one for Opportunities with $1,000,000 or more estimated budget, and one for Opportunities with estimated budget between $500,000 and $1,000,000.

### 7.3.1 Task 0 – Enable Playbooks

In this task you will enable Playbooks.

1. Go to your **Sales Hub** application.
2. Click on **Sales** at the bottom of the left menu to navigate the site map. Select **App Settings** from the list.
3. Locate and click **Playbook Settings** under the **Sales Administration** settings.
4. Click the toggle swich to **Enable.

### 7.3.2 Task 1 – Create Playbook Categories

In this task you will create Playbook Categories.

1. Go to your **Sales Hub** application.
2. Click on **Sales** at the bottom of the left menu to navigate the site map. Select **App Settings** from the list.
3. Locate and click **Playbook Categories** under the **Playbook management** settings.
4. Click **+ New**.
5. Enter **[my prefix] Over $1,000,000** for **Name** and click **Save**.
6. Click **+ New** again.
7. Enter **[my prefix] $500,000 to $1,000,000**. For **Name** and click **Save**.

### 7.3.3 Task 2 – Create Playbook Template One

In this task, you will create a Playbook Template and add Playbook Activities.

1. In the left menu, select **Playbook Templates**.
2. Click **+ New**.
3. Start typing your prefix into the **Category** field. The playbook categories you just created will appear. Select **[my prefix] Over $1,000,000** for **Category**. The **Name** will autofill.
4. Enter **10** for **Estimated Duration (days)** and click **Save**.
5. Locate the **Select Record Types** section on the Playbook Template form.
6. Select **Opportunity** and click **>**.
7. Go to the **Playbook Activities** sub-grid and click **+ Add Activity**.
8. Select **Phone Call**.
9. Enter **[my prefix] Introduction and Meeting Setup** for **Subject**.
10. Enter **2** for **Relative Due Date (Days).** The number of days is counted from the launch date of the Playbook.
11. Select **04:00 PM** for **Relative Due Time**.
12. Select **30 Minute** for **Duration**.
13. Select **High** for **Priority** and click **Save**.
14. Click **+ Add Activity** again and select **Appointment**.

15. Enter [**my prefix**] **Lunch Meeting with Stakeholders** for **Subject**, **4** for **Relative Start Date (Days),** select **11:00 AM** for **Relative Start Time (Hours), 4** for **Relative End Date (Days),** select **02:00 PM** for **Relative End Time (Hours),** select **High** for **Priority**, and click **Save**.
16. Click **Publish**. Playbooks will not be available to your Users until they are published.
17. Click **Publish** when prompted to confirm the publishing.

#### 7.3.4 Task 3 – Create Playbook Template Two

In this task, you will create a Playbook Template and add Playbook Activities.

1. From the left menu, select **Playbook Templates**.
2. Click **+ New**.
3. Start typing your prefix into the **Category** field. The Playbook Categories you created will appear. Select [**my prefix**] **$500,000 to $1,000,000** for **Category**. The **Name** will autofill.
4. Enter **10** for **Estimated Duration (days)** and click **Save**.
5. Locate the **Select Record Types** section.
6. Select **Opportunity** and click >.
7. Go to the **Playbook Activities** sub-grid and click **+ Add Activity**.
8. Select **Phone Call**.
9. Enter [**my prefix**] **Introduction** for **Subject**.
10. Enter **4** for **Relative Due Date (Days).**
11. Select **03:00 PM** for **Relative Due Time**.
12. Select **30 Minutes** for **Duration**.
13. Select **Normal** for **Priority** and click **Save**.
14. Click **Publish**.
15. Click **Publish** again to confirm the publishing.

### 7.4 Exercise 3 – Using Playbooks

In this exercise, you will use the Playbook Templates you created.

#### 7.4.1 Task 1 – Using Playbook One

1. Go to your **Sales Hub** application.
2. Return to the **Sales** section of the app by clicking **App Settings** in the bottom left menu.
3. Locate and click **Opportunities.**
4. Click **+ New**.
5. Enter [**my prefix**] **Over Million** for **Topic**, **1200000** for **Budget Amount**, and click **Save**.
6. Click on the **Launch Playbook** button located in the command bar.
7. Locate the [**my prefix**] **Over $1,000,000** template. You can use the search bar to search for your prefix if necessary. Select the template by clicking to the left of the template name so that the row is highlighted. Then click **Launch**.
8. Click **Related** and select **Playbooks**.
9. You should see the Playbook you launched. Click on the [**my prefix**] **Over 1,000,000** Playbook.
10. The Playbook will show more information, including when it was started, the estimated close date, the related record, and completed activities. Click to open the **Phone Call** activity from the **Playbook activities** subgrid.
11. Select the User you are logged in for **Call From** by typing in your prefix. Select the contact record for **Jane Doe** for **Call To**. Click **Mark Complete**.

12. You will be taken back to the Playbook.
13. The **Completed Activates** will now show **50% complete**.

#### 7.4.2 Task 2 – Using Playbook Two

3. Locate and click **Opportunities.**
4. Click **+ New**.
5. Enter [**my prefix**] **Half a Million** for **Topic**, **500000** for **Budget Amount**, and click **Save**.
6. Click on the **Launch Playbook** button located in the command bar.
7. Locate the [**my prefix**] **$500,000 to $1,000,000** template. You can use the search bar to search for your prefix if necessary. Select the template by clicking to the left of the template name so that the row is highlighted. Then click **Launch**.
8. Click **Related** and select **Playbooks**.
9. You should see the Playbook you launched. Click on the [**my prefix**] **$500,000 to $1,000,000** Playbook.
10. The Playbook will show more information including when it was started, the estimated close date, the related record, and completed activities. Click to open the **Phone Call** activity.
11. Select the User you are logged in for **Call From** by typing in your prefix. Select the **Jon Doe** contact record for **Call To**. Then click **Mark Complete**.
12. You will be taken back to the Playbook.
13. The **Completed Activates** will now show **100% complete**.
14. Click on the **Complete as** button located on the commend bar.
15. Select **Successful**.
16. The Playbook will be marked as completed and the playbook and all its activities will become read only.

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### 7.5 lab: title: 'Lab 3.2: Manage product catalog' module: 'Module 3: Process sales orders'

# 8 Module 3: Process sales orders

## 8.1 Practice Lab 3.2 – Manage product catalog

## 8.2 Scenario

World Wide Importers (WWI) is looking to standardize their pricing structure and allow for easier creation of quotes, orders, and invoices with accurate pricing and product details. As a functional consultant on the Dynamics 365 for Sales implementation, you have been asked to configure the product catalog. In this lab, you will create a unit group, a price list, a discount list, and products.

**Important Note:** This lab will provide you with an actual Dynamics 365 tenant and licenses for the Power Platform applications you will be using in this course. You will only be provided with one tenant for the practice labs in this course. The settings and actions you take within this tenant do not roll-back or reset, whereas the virtual machine you are provided with does reset each time you close the lab session. Please be aware that Dynamics 365 is evolving all the time. The instructions in this document may be different from what you experience in your actual Dynamics 365 tenant. It is also possible to experience a delay of several minutes before the virtual machine has network connectivity to begin the labs.

## 8.3 Exercise 1 – Product Catalog

#### 8.3.1 Task 1 – Create Unit Group

In this task, you will create unit groups for the speakers.

1. Go to your **Dynamics 365 Sales Hub** application.
2. Click on **Sales** in the bottom of the left menu.

3. Select **App Settings**.
4. From the **Product Catalog** group, select **Unit Groups.**
5. Click + **New**.
6. Enter [**my prefix**] **Speakers** for **Name**, enter **Each** for **Primary Unit**, and click **OK**.
7. Click **Related** and select **Units**.
8. You will find that you only have the default unit **Each** now; you will add three more units. Click + **New Unit**.
9. Enter **Speaker** for **Name**, **1** for **Quantity**, select **Each** for **Base Unit**, and click **Save & Create New** by selecting the carrot to the right of the **Save and Close** button.
10. Enter **Pair** for **Name**, **2** for **Quantity**, select **Speaker** for **Base Unit** and click **Save & Create New**.
11. Enter **Set** for **Name**, **2** for **Quantity**, select **Pair** for **Base Unit** and click **Save and Close**.
12. You will now have four unit groups in the list.

### 8.3.2 Task 2 – Create Discount List

In this task, you will create a Discount List for people that buy 3 or 4 speakers. The 3rd speaker will get 15% discount and 4 to 50 speakers will get a 25% discount.

1. From the **Product Catalog** group, select **Discount Lists.**
2. Click + **New**.
3. Enter [**my prefix**] **Quantity Discount** for **Name**, select **Percentage** for **Type**, and click **Save**.
4. Click **Related** and select **Discounts**.
5. Click + **New Discount**.
6. Make sure [**my prefix**] **Quantity Discount** is selected for **Discount Type**, enter **2** for **Begin Quantity**, **3** for **End Quantity**, **15** for **Percentage** and click **Save**.
7. Click + **New** again.
8. Select [**my prefix**] **Quantity Discount** for **Discount Type** by starting to enter in your prefix. Then enter **4** for **Begin Quantity**, **50** for **End Quantity**, enter **25** for **Percentage**, and click **Save**.

### 8.3.3 Task 3 – Create Price List

In this task, you will create a price list for the speakers.

1. From the **Product Catalog** group, select **Price Lists.**
2. Click + **New**.
3. Enter [**my prefix**] **Top D. Electronic** for **Name**, select **US Dollar** for **Currency**, and click **Save**.

### 8.3.4 Task 4 – Create Products

In this task, you will create products.

1. Click on the **App Settings** button.
2. Select **Sales**.
3. From the **Collateral** group, select **Products**.
4. Click **Add Product.**
5. Enter [**my prefix**] **Top D. HiFi** for **Name**, enter [**myprefix**]**1234** for **Product ID**, select [**my prefix**] **Speakers** for **Unit Group** (you can easily find it by typing in your prefix), select **Speaker** for **Default Unit**, enter **2** for **Decimals Supported**, and click **Save**.
6. Select the **Additional Details** tab.
7. Click + **New Price List Item**.

8. Select [**my prefix**] **Top D. Electronic** for **Price List**, select **Quantity Discount** for [**my prefix**] **Discount List**, select **Whole** for **Quantity Selling Option**, and select the **Pricing Information** tab.
9. Enter **150** for Amount and click **Save and Close**.
10. Click **Publish**.
11. Click **Confirm** to publish.
12. In the left menu, select **Products** in the Collateral group.
13. Click **Add Product**.
14. Enter [**my prefix**] **DX Power Supply** for **Name**, enter [**myprefix**]**4321** for **Product Number**, select **Default Unit** for **Unit Group**, select **Primary Unit** for **Default Unit**, enter **2** for **Decimals Supported**, and click **Save**.
15. Select the **Additional Details** tab.
16. Click **+ New Price List Item**.
17. Select [**my prefix**] **Top D. Electronic** for **Price List**, select **Whole** for **Quantity Selling Option**, and select the **Pricing Information** tab.
18. Enter **120** for Amount and click **Save and Close**.
19. Click **Publish**.
20. Click **Confirm** to publish.
21. Select **Products** from the left menu.
22. Click **Add Product**.
23. Enter [**my prefix**] **Top D. Comm System** for **Name**, enter [**myprefix**]**7894** for **Product ID**, select **Default Unit** for **Unit Group**, select **Primary Unit** for **Default Unit**, enter **2** for **Decimals Supported**, and click **Save**.
24. Select the **Additional Details** tab.
25. Click **+ New Price List Item**.
26. Select [**my prefix**] **Top D. Electronic** for **Price List**, select **Whole** for **Quantity Selling Option**, and select the **Pricing Information** tab.
27. Enter **2500** for Amount and click **Save and Close**.
28. Click **Publish** to publish the product.
29. Click **Confirm** to publish.
30. From the left menu, select **Products**.
31. The products you created should show up on the **All Products, Families & Bundles** view. You can switch to this view using the carrot by the default view title. You can use the search bar to search for your prefix to find your products.

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### 8.4 lab: title: 'Lab 3.3: Build quotes' module: 'Module 3: Process sales orders'

# 9 Module 3: Process sales orders

## 9.1 Practice Lab 3.3 – Build quotes

## 9.2 Scenario

As a sales analyst for the Dynamics 365 Sales implementation at World Wide Importers, you need to test the newly configured product catalog enhancements to the quoting process. In this lab, you will add product line items to an opportunity and create a quote from that opportunity.

**Important Note:** This lab will provide you with an actual Dynamics 365 tenant and licenses for the Power Platform applications you will be using in this course. You will only be provided with one tenant for the practice labs in this course. The settings and actions you take within this tenant do not roll-back or reset, whereas the virtual machine you are provided with does reset each time you close the lab session. Please be aware that Dynamics 365 is evolving all the time. The instructions in this document may be different from what you experience in your actual Dynamics 365 tenant. It is also possible to experience a delay of several minutes before the virtual machine has network connectivity to begin the labs.

## 9.3 Exercise 1 – Create a Quote

### 9.3.1 Task 1 – Add Products Line Items

In this task, you will create an Opportunity and add Products Line Items.

1. Go to your **Dynamics 365 Sales Hub** application.
2. From the left menu, select **Opportunities**.
3. Click **+ New**.
4. Enter **[my prefix] Interested in Top D. System** for **Topic**, select **Jon Doe** for **Contact**, select **Doe Inc.** for **Account** and click **Save**.
5. Select the **Products** tab.
6. You must select a **Price List** before you can add Opportunity Products. Select **[my prefix] Top D. Electronics** for **Price List**.
7. Select **System Calculated** for **Revenue**.
8. Above the subgrid, click **+ Add Product.**
9. Select **[my prefix] DX Power Supply** for **Existing Product**, enter **2** for **Quantity**, and click **Save & Create New**.
10. Click **+ Add Product** again. Select **[my prefix] Top D. Comm System** for **Existing Product**, enter **1** for **Quantity** and click **Save & close**.
11. Click **+ Add Product** again. Select **[my prefix] Top D. HiFi** for **Existing Product**, enter **1** for **Quantity** and click **Save & close**.
12. You will have three products in the sub-grid. Double click on the **[my prefix] Top D. HiFi** product.
13. Locate the **Volume Discount** field. You will find that there is no discount for buying one Speaker.
14. Change the **Quantity** to **4** and click out of the field. The Discount will now kick in and the Volume Discount field will show the discounted value.
15. Click **Save and Close**.

### 9.3.2 Task 2 – Create Quote

In this task, you will create a Quote from the Opportunity you created in Task

1. Go to your **Dynamics 365 Sales Hub** application.
2. Open the Opportunity you created in Task 1. It will be called **[my prefix] Interested in Top D. System.**
3. Select the **Quotes** tab.
4. Click **+ New Quote**.
5. The Quote form will open, and relevant information will be copied from the Opportunity.
6. Select the **Quote Lines** tab. Examine the **Products** sub-grid and make sure products and their quantities look as you expected. You can change the quantities and discount the price of each line item.
7. Click **Activate Quote**.
8. Click **Export to PDF** located on the command bar and select **Print Quote for Customer**. Click **Download.**
9. Open the generated document and see what the Quote looks like.
10. Close the PDF.
11. Close the **Export to PDF** window.

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### 9.4 lab: title: 'Lab 3.4: Orders and invoices' module: 'Module 3: Process sales orders'

# 10 Module 3: Process sales orders

## 10.1 Practice Lab 3.4 – Orders and invoices

## 10.2 Scenario

As a sales analyst for the Dynamics 365 for Sales implementation at World Wide Importers, you need to test the newly configured product catalog enhancements to the order and invoice processes. In this lab, you will create an order from a quote and create an invoice from that order.

**Important Note:** This lab will provide you with an actual Dynamics 365 tenant and licenses for the Power Platform applications you will be using in this course. You will only be provided with one tenant for the practice labs in this course. The settings and actions you take within this tenant do not roll-back or reset, whereas the virtual machine you are provided with does reset each time you close the lab session. Please be aware that Dynamics 365 is evolving all the time. The instructions in this document may be different from what you experience in your actual Dynamics 365 tenant. It is also possible to experience a delay of several minutes before the virtual machine has network connectivity to begin the labs.

## 10.3 Exercise 1 – Orders and Invoices

### 10.3.1 Task 1 – Create Order

In this task, you will create an Orders from a Quote.

1. Go to your **Dynamics 365 Sales Hub** application.
2. In the left menu, select **Quotes.**
3. Open the **Quote** you created titled [**my prefix**] **Interested in Top D. System**.
4. Click **Create Order**.
5. Leave everything as default and click **OK**.
6. The **Order** form will open. You can edit the **Order** information.
7. Click on the vertical ellipses button at the end of the command bar. Select **Word Template** and then select **Order Summary**.
8. Open the generated Word document and review the **Order**. Close the Order Summary.
9. Click **Fulfill Order**.
10. Click **Fulfill**. The record will become read-only. Do not navigate away from this page.

### 10.3.2 Task 2 – Create Invoice

In this task, you will create an Invoice.

1. Make sure you are still in the **Order** form.
2. Click **Create Invoice**.
3. The **Invoice** form will open.
4. Click on the vertical ellipses button at the end of the command bar. Select **Word Template** and then select **Invoice Summary**.
5. Open the generated Word doc and review the **Invoice**. Close the Invoice Summary.
6. We will assume the Customer paid in full. Click **Invoice Paid**.
7. Select **Complete** and click **OK**.