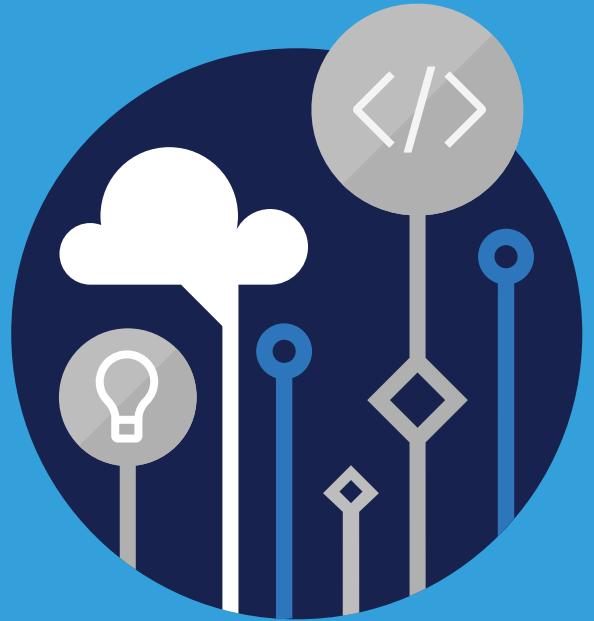


Microsoft  
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Course



**MB-210T01**

Microsoft Dynamics 365  
Sales

**MB-210T01**  
**Microsoft Dynamics 365 Sales**

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Revised April 2019



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## Module 0 Course introduction

### Course introduction and welcome

### Introduction

#### Course Description

Microsoft Dynamics 365 Sales is an end-to-end application to manage the handling of customers and potential customers; it assists with tracking data against sales goals, automating best practices, learning from data, and more.

Our team of globally recognized experts take students step by step, from lead, to opportunity, to closed deal. Using the application's available automation and customization options, students will learn how to enable sales staff to be their most productive selves.

#### Audience Profile

A Dynamics 365 Functional Consultant is responsible for performing discovery, capturing requirements, engaging subject matter experts and stakeholders, translating requirements, and configuring the solution and applications. The Functional Consultant implements a solution using out-of-the-box capabilities, codeless extensibility, application, and service integrations.

#### Course Completion

After completing this course, students will be able to:

- Install and configure the application
- Identify common sales scenarios
- Complete a sales cycle
- Configure the product catalog
- Manage customers

- Utilize analytics tools with customer data

# Dynamics 365 Functional Consultant curriculum

## Certification

Upon completion of this course and practicing building solutions, we encourage you to [get certified.](#)<sup>1</sup>

In order to gain the Dynamics 365 Sales Functional Consultant Associate exam, you must pass pre-requisite exam PL-200 as well as MB-210.

## PL-200 Certification Exam

This exam measures your ability to accomplish the following technical tasks: configure Microsoft Dataverse, create apps using Power Apps, create and manage Power Automate, implement Power Virtual Agents chatbots, and integrate Power Apps with other apps and services.

PL-200 Study Areas	Weights
Configure Microsoft Dataverse	25-30%
Create apps using Power Apps	20-25%
Create and manage Power Automate	15-20%
Implement Power Virtual Agents chatbots	10-15%
Integrate Power Apps with other apps and services	15-20%

## MB-210 Certification Exam

This exam measures your ability to accomplish the following technical tasks: perform configuration, manage core sales tables, and configure additional tools and services.

MB-210 Study Areas	Weights
Perform configuration	25-30%
Manage core sales tables	50-55%
Configure additional tools and services	15-20%

<sup>1</sup> <https://docs.microsoft.com/en-us/learn/certifications/exams/mb-210>

## Module 1 Configure Dynamics 365 Sales

### Configure organization and management settings

#### Dynamics 365 Sales overview

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

#### Different sales solutions for different size of businesses

Dynamics 365 Sales is available in the following flavors to suit the different business needs:

- The Sales Hub app is built on the Unified Interface framework. The Unified Interface framework uses responsive web design principles to provide an optimal viewing and interaction experience for any screen size, device, or orientation. The Sales Hub app is optimized to work on mobile devices as well as desktops. This app is available with the Dynamics 365 Sales Enterprise licensing plan.
- The Sales Professional app is similar to the Sales Hub app, but the tables included in the Sales Professional app are a subset of the tables included in the Sales Enterprise. This app is available with the Dynamics 365 Sales Professional licensing plan.

In addition to these, the new Microsoft Dynamics 365 Sales mobile app is available. This app is optimized for core field seller scenarios to help sellers make use of the time that they spend on the road while traveling to meet customers.

#### What Dynamics 365 Sales offers

Dynamics 365 Sales offers great benefits, whether you're using a desktop, phone, or tablet.

## Benefits for salespeople

- Follow guided business processes, so you know which steps to take next to close deals faster. You can tailor these business processes for your organization's needs.
- Manage customers and deals wherever you are, on any device (phone, tablet, PC, or Mac).
- Get productive faster by using familiar tools. Dynamics 365 Sales is tightly integrated with Office 365 apps, which makes it easier to get going more quickly:
  - Use SharePoint to store and view documents like presentations or notes in the context of a row, such as an opportunity, so anyone working on the opportunity can view them.
  - Open sales data in Excel, make changes, and save the changes back to Dynamics 365 Sales, all without switching between applications.
- Get actionable insights and suggestions based on how you work. For example, if you have an opportunity closing next week, the Relationship Assistant will send you a reminder to connect with your customer.
- Find all activities (appointments, phone calls, and so on) related to a customer or opportunity in one central place, so you have the context you need to do your job.

## Benefits for sales managers

- Accelerate your team's performance by using real-time analytics based on historical data and predictive information.
- Monitor results, and provide feedback and coaching, in real time.
- Use immersive Excel and prebuilt templates to do quick analysis without leaving Dynamics 365 Sales.

## Configure the application

After installing Dynamics 365 Sales, there are a few important settings that need to be configured to meet your organization's needs. In this topic, we'll review the most important settings that Functional Consultants should address before configuring the rest of the system.

## Sales territories

Sales territories improve the sales potential because the members of a territory are focused on the services or sales within that territory. You can associate the financials directly with a territory and its members, which simplify business analysis. Also, based on the sales territory type and size, you can define sales methodologies and the training required for those locations.

Organizations can create a model and visualize their sales territories in a hierarchical format using out-of-the-box territory hierarchical relationship.

Users will need the appropriate security permissions to create and manage Sales Territories.

## Auto-number settings

Contracts, cases, articles, quotes, orders, invoices, marketing campaigns, categories, and knowledge articles are automatically numbered. If your organization has standard numbering formats, you can change the default three-character prefixes and number format to match your organization.

Make sure you have the System Administrator or System Customizer security role or equivalent permissions to update the setting.

## Fiscal year

You can set the fiscal year period, and how it's displayed, for your organization. After you set the fiscal year options, you can't change them. You must have the System Administrator role to change fiscal year settings.

## Currencies

Currencies determine the prices for products in the product catalog and the cost of transactions, such as sales orders. If your customers are spread across geographies, add their currencies to manage your transactions. Add the currencies that are most appropriate for your current and future business needs. Dynamics 365 supports multiple currencies.

When setting up your currency settings, you can customize the following information:

- **Currency type:** Which currency, or currencies, you'd like to use.
- **Currency code:** Short form of the currency (for example, USD for United States Dollar).
- **Currency precision:** Number of decimals you want to use for the currency. You can add a value between 0 and 4.
- **Currency name:** Unless you selected a custom currency for "Currency type", this column will automatically be filled.
- **Currency symbol:** Unless you selected a custom currency for "Currency type", this column will automatically be filled.
- **Currency conversion:** The value of the selected currency in terms of 1 US dollar. Make sure to update this value frequently as required to avoid inaccurate calculations in your transactions.

## Goals

Set the duration and frequency of the automatic rollup of goals. You can always perform a manual rollup for any goal at any time.

## Customization options

Dynamics 365 Sales has full functionality right out of the box. The application gives you everything you need to build and track relationships with customers and to manage the sales process from lead to order. Each business is unique in the data they track and the processes they follow. The first step to tailoring for your needs is to configure Dynamics 365 Sales. In this topic, we are looking at how to begin to customize the app by tracking more data, changing or adding business processes, and tailoring forms and views to meet your specific requirements. It's essential that before you start customizing, you have a good grasp of the out of box functionality, so you don't re-create something the app already does.

## Sales Hub app or custom app

Dynamics 365 Sales ships with a Sales Hub app. This app is configured for users to use all the primary sales features. The app's navigation and contents are customizable. As Microsoft updates Dynamics 365 Sales, this app automatically reflects the changes they ship, unless you make modifications that would prevent that from happening. For example, if they added a new table to the app navigation, your users

would see it automatically after the upgrade. The same is true for table forms and views. By default, if you don't change those to your forms and your views on an upgrade you will see any changes Microsoft makes. Alternatively, if you create any of your own forms or views and change the Sales Hub app to reference them, they are not automatically upgraded.

Another common decision to make around apps is whether you should use the Sales Hub app or create a custom app that includes a subset of the same assets. Remember: the app is how you can compose what your users see and interact with and how you define the user experience. A custom app gives you complete control of the contents, but does not have the benefit of automatically upgrading the app when Microsoft ships an update. If your custom app references the same forms and views as Sales Hub, it will still automatically reflect the changes Microsoft ships in an upgrade even if the app is custom.

There is no single right choice here; it is important to evaluate your need for control and customization with the approach you take.

## Security roles

The out of the box security roles provide an example set of roles for Sales, such as Salesperson and Sales Manager. You can choose to use these roles and modify them, or often teams will copy these roles and tailor them for their own needs. For example, you might share data with all sales staff in an office or a division or you might require all sales staff to only see their own data. Review how your specific requirements match with the current out of the box roles and decide what customization is required.

Customizing security roles is also another way you can tailor what your users have access to in an app.

## Tables, forms and views

Forms are one of the primary ways for users to use the application to create, read, edit and otherwise interact with data. The application comes with several forms for each table already. It is possible to edit these system forms, and also to create your own. If you edit the existing forms and views, then as Microsoft changes the application, you will see most of those changes automatically on upgrade of Dynamic 365 Sales. If you create your own or a copy of these, you will be responsible for making the changes after each release.

One of the most common customizations for forms and views is removing any columns that you don't need. The default forms come loaded up to make a good general sales app, but no one usually uses all the columns. For example, on Account, if you don't ship to your customers removing the Shipping section which includes Shipping Method and Freight Terms makes a lot of sense. Removing what is not used reduces clutter and allows users to focus on the data they need to provide.

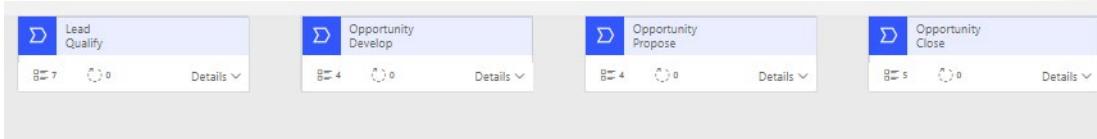
Reviewing views for essential columns is useful, as well as creating views that filter on common needs. Good views can help your users quickly find the data they are looking for.

**Note:** Removing columns from forms and views is not the same as removing them from the app itself. There are relatively few consequences of removing system columns from forms and views.

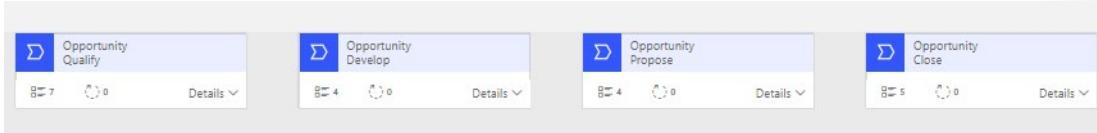
## Business process flows

A business process flow is a tool to help guide users through a business process on rows. They enable you to have the user to complete certain steps before the process is complete. In Dynamics 365 Sales, there are some business process flows that are out of the box, or you can create your own. Configuring the process stages and steps so that they work with your company's business processes is essential for them to be usable - unless, of course, the company is adopting the out of the box processes.

Lead to Opportunity Sales Process is one of the out of the box business process flows. This BPF walks you through getting a lead through to the opportunity closing stage. This can be used by almost any average company going through the sales stages.



Another out of the box Business Process Flow is "Opportunity Sales Process". This has the stages and steps to run through an opportunity process.



In addition to customizing the stages and steps, you can also add conditional branches to handle process variations. Automation can also be added with workflows or Microsoft Flows triggered from stage or steps in the process.

By customizing Dynamics 365 Sales, you change it from a standard off the shelf application that everyone has to one that is tailored to your specific requirements.

## Security roles

When setting up security in Dynamics 365 Sales, you will need to assign a security role to each user based on the access you want that user to have. Depending on what function you want your users to have, you need to assign them the correct permissions through security roles.

Security roles in Dynamics 365 Sales is a matrix of security privileges (row-level) and access levels (task-based) for different tables. There are different tabs based on functionality within this security matrix. Users can have more than one security role. These roles are cumulative, so they will have all the permissions based on all the roles that are assigned to that user.

In addition to the role-based security managed as described below, you can create role-based forms. With the forms you can create a different user experience based on a user's role. If, for example, you had a custom form for associates in your Australia division, you might want a slightly different form for associates in your Europe division. You will need a designated fallback form for each table so that any user with any type of access has a form available. If a user has access to more than a single form for a table, they will see a form selector that allows moving from one form to another. Role-based forms do not control the user's access to the data, but rather tailor their experience to their role.

The Sales tab contains the most applicable rows for the Sales app. The tabs Business Management and Business Process Flows are also important for Sales as those are the permissions to enable some of the functionality most used by users of the sales application.

Security Role: Sales Manager								
Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Competitor	●	●	●	●	●	●	●	
Invoice	○	●	○	○	○	○	○	●
Order	○	●	○	○	○	○	○	●
Product	●	●	●	●	●	●	●	
Property	●	●	●	●	●	●	●	
Property Association	●	●	●	●	●	●	●	
Property Instance	○	●	●	○	●	●	○	●
Property Option Set Item	●	●	●	●	●	●	●	
Quote	○	●	○	○	○	○	○	●
Sales Literature	●	●	●	●	●	●	●	
Territory	●	●	●	●	●	●	●	

Each security role has a set of privileges and access levels associated with it. There are out of the box security roles where privileges are preset for everything you need to for the sales application. Some of these out of the box roles for Sales are Sales Manager and Salesperson. These roles give default permissions for that person based on his role assigned.

The Salesperson security role gives a salesperson all the permission that a salesperson would need to enter all his day to day information such as adding or editing Leads, Opportunities, and invoices

The out of box privileges for the Sales Manager and Salesperson usually do not need to be changed unless you have a unique sales organization. The Salesperson role only allows that user to create and delete certain tables, like invoices and orders, whereas the user with the Sales Manager role can create or delete these tables for anyone in their business unit. For example, a Sales Manager can write an order for another salesperson or delete one of their orders, but the salesperson cannot delete or write an order for another salesperson. This is just one example of how the out of the box privileges are setup.

If there are circumstances where you want to add or delete privileges that are not in one of the out of the box roles, you are able to create custom roles and change the privileges for that table. For example, if you want salespeople to be able to assign accounts to anyone within the organization and not just for themselves, you can customize the role to match this need.

**Security Role: Salesperson**

Working on solution: Default Solution

Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Competitor	●	●	○	○	●	●		
Invoice	○	●	○	○	○	○	○	●
Order	○	●	○	○	○	○	○	●
Product	○	●	○	○	●	●	●	
Property	○	●	○	○	●	●		
Property Association	○	●	○	○	●	●		
Property Instance	○	●	●	○	●	●	○	●
Property Option Set Item	○	●	○	○	●	●	●	
Quote	○	●	○	○	○	○	○	●
Sales Literature	○	●	○	○	●	●		
Territory	○	●	○	○	○	○		
<b>Miscellaneous Privileges</b>								
Override Invoice Pricing	○				Override Opportunity Pricing	○		
Override Order Pricing	○				Override Quote Order Invoice Delete	○		
Override Quote Pricing	○							

**Key**

- None Selected
- User
- Business Unit
- Parent: Child Business Units
- Organization

## Privileges

Privileges are the security that defines what action a user can perform in the system. The privileges are Create, Read, Write, Delete, Append, Append To, Assign and Share.

The circle defines what privileges the users have for that table. An empty circle means that there are no privileges assigned. For example, if the user should not have access to create an invoice, the circle next to invoice and under the create column would be empty.

## Access Levels

The access levels show the level at which a user can interact with rows within a given table. The portion of the circle filled illustrates the levels. The levels are None, User, Business Unit, Parent-Child Business Unit, and Organization. You need to click in the circle to change the level. Each click will change the fill and/or color. Click in the circle until it is the level desired is selected.

**Note:** Many of the Miscellaneous Privileges only have an organizational or nothing option. The other levels do not apply to these.

- User level (basic):** This gives a user access to rows that the user owns or anything shared with the user or team that the user belongs to. You would want to use this setting if you want the user only to access their own rows. You would not want salespeople to be able to delete other sales people's accounts or leads.
- Business Unit (local):** This allows access to the data of other users in a business unit. A business unit has to be setup within Dynamics 365 and can be a hierarchy of a department. Sales managers would want to see all his/her subordinates' rows
- Parent-Child Business Units (deep):** This will give the user access to all the business units they belong to along with any business units that are subordinate to the user's business unit.

- **Organizational (global):** This user has access to all the rows in the organization. If you have a Salesperson able to add products from any level of the organization, you would want him to have access to all the organizational products and not just the ones available for his business unit.

You can also create customized security roles by copying one of the out of the box security roles and making the necessary privilege and access level changes desired. You should create the customization based on particular job needs. If you have any custom tables in your system, by default only system administrators and system customizers have access, so you will need a security role with the correct privileges and access levels for your users to be able to work with these tables.

## Module 2 Manage leads and opportunities with Dynamics 365 Sales

### Manage leads with Dynamics 365 Sales

#### Dynamics 365 leads overview

Dynamics 365 Sales enables an organization to manage their sales lifecycle process from start to finish. A typical sales lifecycle would resemble the image below:



Most sales processes begin with leads, so let's examine what a lead is in more detail.

A *lead* is someone with an interest in what you are selling. A lead might be an existing client, or someone that you have never done business with before.

Some common examples of leads may include the following:

- Someone who has expressed interest by requesting more information on your website.
- Someone who is following a post that you or your organization is making on social media.
- Someone who responded to an advertising or email campaign.

Leads are considered temporary rows. The goal of a lead is to determine the viability of being a customer. This is referred to as *lead qualification*. Many organizations implement a lead qualification process. During qualification, leads are contacted, more information is gathered, and finally, a decision is made about the lead's status.

For example, if a salesperson meets someone at a tradeshow and gets a business card, they might not know if this person is a viable customer. It is only after the salesperson researches and engages with the

individual, that they can determine if their needs align with what their organization can deliver. Not only are leads used to determine if an organization is good fit for the customer, but they also help determine if the customer is a good fit for the organization. If the lead is considered as a viable customer, they would be qualified and moved to the next stage in the sales process. If they are not a viable customer, the lead would be disqualified.

Not all organizations use leads. Some organizations deal with opportunities, or only qualified prospective sales. Organizations that depend on mass demand generation processes such as advertisements, road shows, and cold calling prospect lists, will likely use leads. Businesses that have demand generation methods or those that engage in mass marketing campaigns may benefit from lead management, this process helps businesses sift through the data and helps the sales department focus their efforts in the best direction.

To decide whether to use leads, consider the following:

- Do they invest substantial time and money in generating lists of possible customers like mass mailings or cold calling?
- Do they keep lists of people in the correct demographic, but have limited information on them like very little contact information?
- Do they have a process or team dedicated to sifting through these possible customers and contacting them to identify good prospects?
- Do they need to manage lists of potential customers that must not be mixed in with their current customer lists, such accounts and contacts?

If any of these considerations apply, the organization may want to use leads. Even if the organization does not have large lead generation

initiatives, ask if management wants to track the effort that sales spends tracking and working with prospects. If so, consider using Microsoft Dynamics 365's lead management features.

Leads are a key table in the Dynamics 365 sales process and represent the beginning of many processes. In addition to leads, Dynamics 365 Sales includes several components that are used to not only sell to customers but assist in maintaining a long-term healthy relationship with customers.

Here are some of the most commonly used sales components.

Term	Definition
Account	An account represents a business or organization. Sometimes this is a customer or a vendor. In some organizations, this might be a different grouping, such as a family. Typically, an account will have related contact rows.
Activities	An activity is a type of table that offers tracking and scheduling options. By default, the system will have activities such as email, appointment, and phone call already configured. An administrator can add additional custom activities to meet additional business needs.

Term	Definition
Business process flow	A business process flow (BPF) is a type of automation in Microsoft Power Platform. The BPF is placed on an table and offers users guidance and a predictable action plan for gathering data. Administrators can add additional automation based on triggers from the user's interaction with the BPF.
Contact	A contact represents a single individual. A contact will often have many related rows such as an account and activities.
Customer	A customer can be either an account or a contact. Typically speaking, in a business to business scenario, this is an account. In a business to consumer scenario, this is a contact.
Invoice	An order or row of a sales including details about products or services purchased that has been billed to the customer.
Opportunity	Like a lead, an opportunity is a potential sales transaction. Typically speaking, an opportunity is a more viable prospect than a lead, and it will contain more information and be tracked for a longer period of time.
Order	A confirmed request for delivery of goods and services based on specified terms, or a quote that has been accepted by a customer.
Product catalog	A collection of rows that interact with opportunities, quotes, orders, and invoices to facilitate management of products, price lists, discounts, and product families for sales transactions.
Quote	A formal offer for products or services, proposed at specific prices and related payment terms to a customer.

The following image shows an example sales process from beginning to end:



In the image above, we can see a lead that has contacted our organization about products and services. An account executive reaches out to the lead to gather more information about the lead and determine if we are a good fit for them, and if they are a good fit for us.

- If it is determined that it is not a good fit, the lead is disqualified and the sales cycle ends.
- If it is determined that everyone is a good fit, the lead is qualified to an opportunity.
  - If the lead is an existing customer, a new opportunity is created and associated with an existing account and/or contact row.
  - If the lead is a new customer, a new account, contact, and opportunity row is created.
- Details like the products and services that the lead is interested in, estimated revenue, and timelines are added to the opportunity.
- A quote is added to the opportunity that represents the formal proposal to the customer.
- When the customer agrees to the quote, an order is generated. The quote and opportunity associated with the order are closed.
- After the order is fulfilled, an invoice is generated to bill the customer.

## Create Dynamics 365 leads

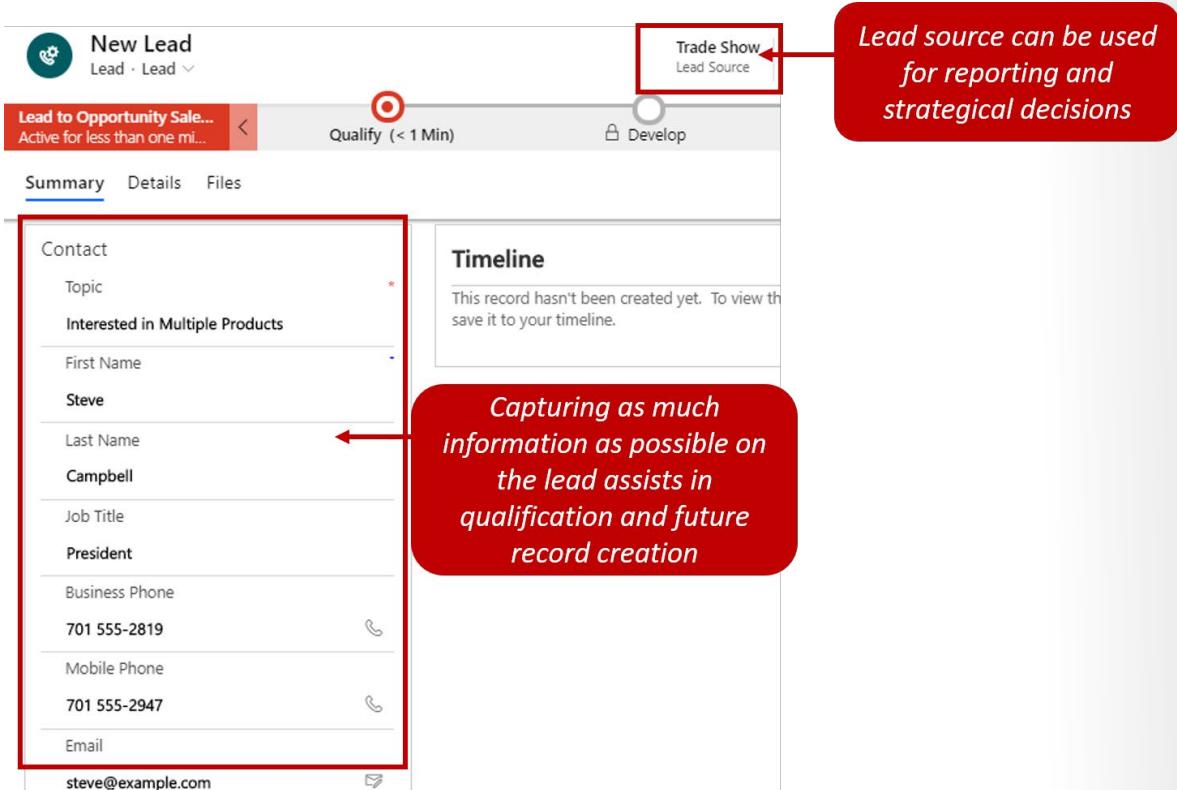
An organization can identify leads in many ways. A lead can come from an email or a phone call that was received by someone in the organization. It can come from a list of leads that a vendor bought. It might even come from a customer who was included in a marketing campaign and expressed interest.

Since a lead can come from multiple sources, Microsoft Dynamics 365 Sales provides multiple ways to create lead rows. Here are some of the most common ways:

- Manually creating leads
- Converting email activities to leads
- Bulk importing leads

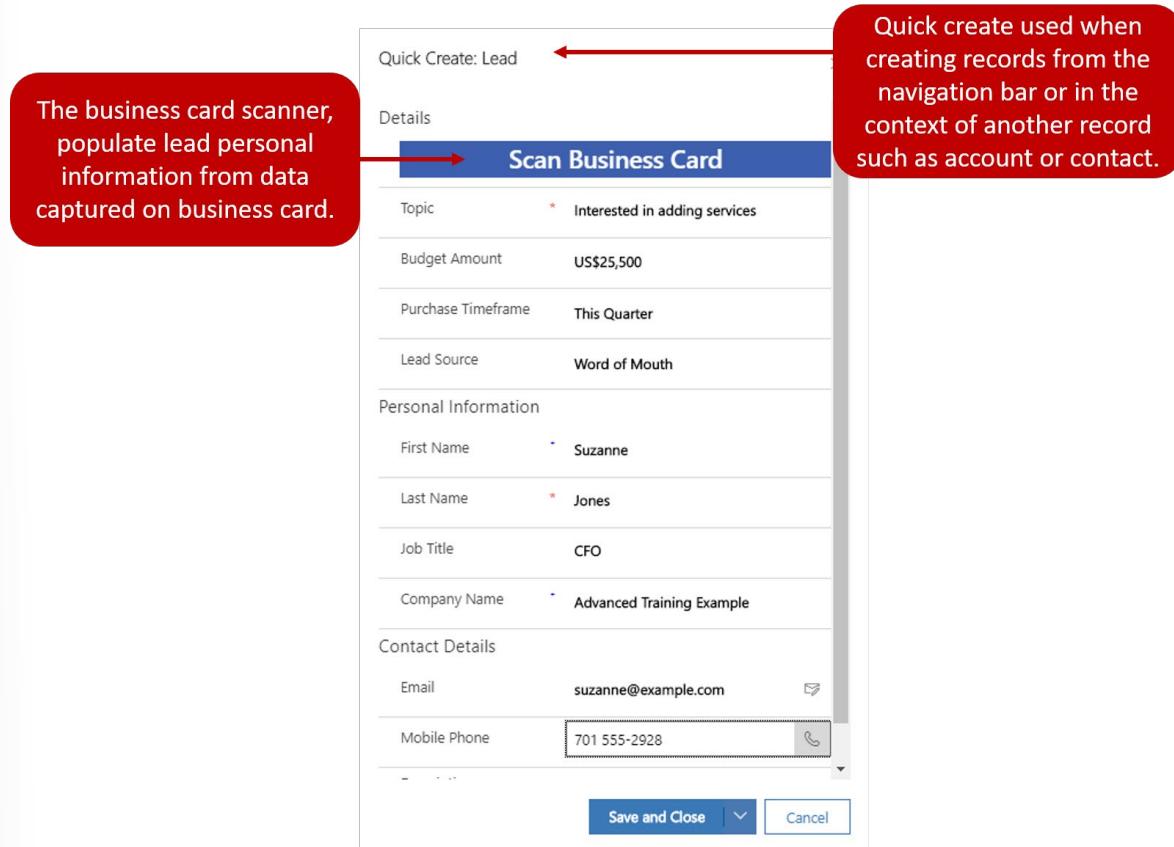
## Manually creating leads

Leads can be manually created in Microsoft Dynamics 365 by using the Sales Hub app. In the app, go to **Leads**, and then select **New**. The **New Lead** page appears, where you can enter details like the lead's name, contact information, and company information. When you create a lead, **Topic** and **Last Name** are the only required columns. But the more information you can capture in the lead, the easier it will be to research that lead during the qualification process. Additionally, if the lead is qualified, corresponding account and contact rows can be created automatically. Therefore, the more information that you enter when you create the lead, the more complete those account and contact rows will be.



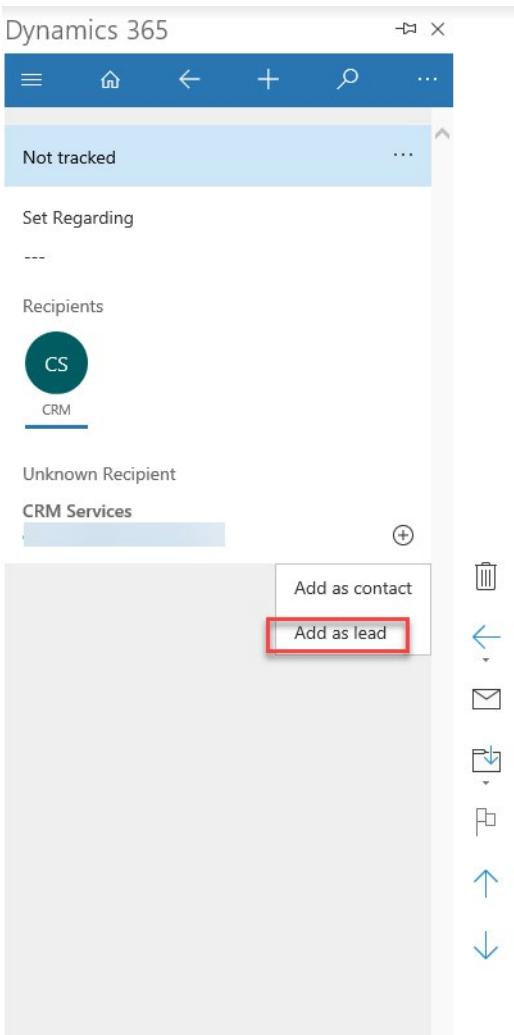
## Quick create dialog box

Sometimes, you may quickly capture basic information about a new lead, with the intention of coming back later and filling in the remaining details. In these situations, you can use the **Quick Create** dialog box for leads. To open the **Quick Create: Lead** dialog box, select the **New** button on the navigation bar. You also use this dialog box when you create new leads from the **Related** tab on account and contact rows. The **Quick Create: Lead** dialog box doesn't include columns for address information. It just includes columns for the most essential details about a lead, like the source of the lead, and the lead's first and last names, company, and email and phone contact information.



## Converting email activities to leads

Another way to create leads in Dynamics 365 Sales is to convert emails to leads. You can convert an email to a lead directly in the sales application or in the Microsoft Dynamics 365 App for Outlook. Typically, the Dynamics 365 App for Outlook is used more often, because sales staff probably spend most of their time in their email application.

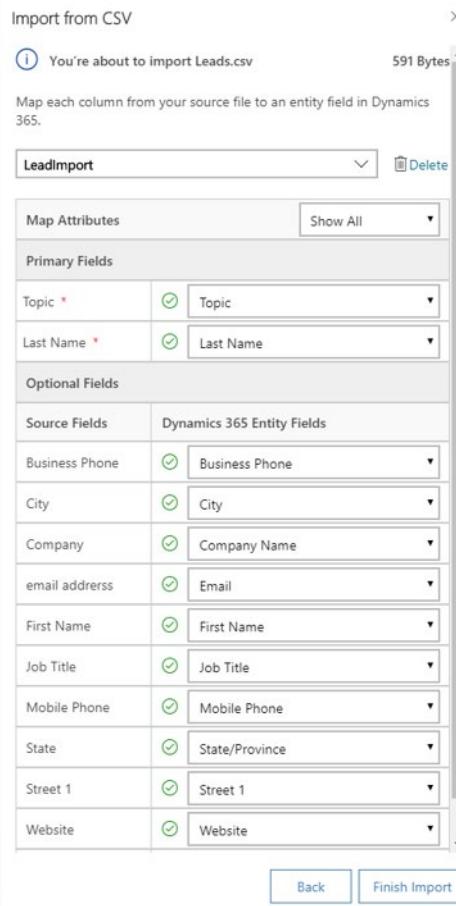


## Bulk importing leads

Many organizations receive lists of leads for external vendors, and then have sales staff cold call those leads to either qualify or disqualify them. In these cases, lead rows can be imported into the system in bulk. Each lead row can then be assigned to the account executive who is most qualified to work on it. Typically, marketing managers, sales managers, or individual account executives import leads.

When you're viewing leads, you can import new leads by using the command bar. Leads can be imported in two formats: Microsoft Excel files or comma-separated values (CSV) files.

When you import a file that includes leads, you must make sure that the columns in the file can be mapped to specific columns in Dynamics 365 lead rows. After you select the file to import, you'll be asked to review the mappings.



You must make sure that all required columns in Dynamics 365 are mapped to columns in the import file. In addition, any other columns that exist in the import file must be mapped to corresponding columns in Dynamics 365.

During the mapping process, Dynamics 365 tries to identify the most appropriate columns to map to. But there may be cases where it doesn't find a match. For example, if the import file has a column that's named **zip**, Dynamics 365 might not identify that **ZIP/postal code** is the most appropriate column to map to. In these cases, you might have to map the columns manually.

If a column in the file that you're importing doesn't have a corresponding column in Dynamics 365, you can leave it unmapped or specify that it should be ignored.

After the mapping settings are defined for every column in the import file, select **Finish Import** to finish importing the file.

Sometimes, it's easier to export a template that has the Dynamics 365 column labels, add the data that you want to import in the exported template, and then import the template. This approach helps guarantee that all the columns are correctly matched. It also helps save you time.

For additional information about how to create Dynamics 365 leads: **Create or edit a lead (Sales and Sales Hub)**<sup>1</sup>.

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<sup>1</sup> <https://docs.microsoft.com/dynamics365/customer-engagement/sales-enterprise/create-edit-lead-sales>

## Lead management lifecycle

Typically, while a lead is going through the qualification process, different tasks or actions determine whether it should be qualified or disqualified. Here are some examples:

- Assign the lead to the most appropriate account manager, based on where it came from or the territory where it's located.
- Identify potential stakeholders who have an interest in the project.
- Identify potential competitors who are also speaking or might be speaking with the lead.
- Research the lead to learn more about his or her organization, the organization's annual revenue, or the organization's position in its industry.
- Have several phone calls or in-person meetings to learn more about the lead's situation.

Microsoft Dynamics 365 Sales provides multiple tools and integrations with other solutions to help with this process. The tools include a series of dashboards, charts, and views, and data that's captured at the lead level. For example, a sales manager is reviewing newly created leads and identifies the best account managers to work with those leads. The sales manager can then assign one or more leads directly to a specific account manager from inside the application.

After account managers receive the leads that are assigned to them, they can use multiple tools to do some basic research about the leads before reaching out to them. Those tools might include social media and artificial intelligence. Then, when they reach out to the leads, the account managers can capture details from their phone calls or appointments to help make the final qualification decision.

## Working with lead views

Microsoft Dynamics 365 provides multiple views that show lead data. You can use these views when the lead table is selected in the Sales Hub app. Each view is pre-filtered to show leads in a different way. By default, agents see the leads that have been assigned to them. But agents can select different views to see different sets of leads.

Here are some of the lead-related views that Microsoft Dynamics 365 includes:

- **Open Leads**- All leads that are currently open, regardless of who the lead owner is.
- **Closed Leads**- All leads that have been closed. Both qualified and disqualified leads are included.
- **All Leads**- All open and closed leads.
- **My Open Leads**- All the open leads that are assigned to the signed-in user.
- **Leads opened last week**- All leads that were created last week.
- **Leads opened this week**- All new leads created during the current week.

Depending on their role, people can use these different views to help with their job functions. For example, sales managers might use the **Leads opened this week** view to see all the newest leads that have been added. After they identify one or more leads that should be assigned to a specific account manager, they can select those leads and then select **Assign** on the command bar to assign them to that account manager.

Records can be assigned to other users from views or individual records.

Views can be easily switched using the view selector.

Name	Topic	Status Reason	Created On
Suzanne Jones (Sample)	Interested in adding services	New	12/17/2019 1:45 PM
Steve Campbell (Sample)	Interested in Multiple Products	New	12/17/2019 1:43 PM
Steve Henderson (Sample)	Interested in multiple products	New	12/17/2019 1:41 PM
Michael Cook (Sample)	Need to upgrade current equipment	New	11/20/2019 5:26 PM
Craig Benitez (Sample)	Wants to look into security solutions	Contacted	11/20/2019 5:26 PM
Juana Marquez (Sample)	Needing to purchase multiple devices	New	11/20/2019 5:26 PM
Kristopher Lee (Sample)	Relocating buildings	New	11/20/2019 5:25 PM
Michael Martinez (Sample)	Has Security Concerns	New	11/20/2019 5:25 PM
Andrea Mitchell (Sample)	Needing multiple devices over the next year	New	11/20/2019 5:25 PM
Norma James (Sample)	General Inquiry	New	11/20/2019 5:25 PM
Lindsay Howard (Sample)	Multiple devices needing upgrades	New	11/20/2019 5:25 PM
Booth Flores (Sample)	Needs upgrade of current environment	New	11/20/2019 5:25 PM
Donald Fisher (Sample)	Wanting to Upgrade Current Equipment	Contacted	11/20/2019 4:33 PM
Cary Murphy (Sample)	Needs multiple Devices across different areas	Contacted	11/20/2019 4:33 PM

Account executives might use the **My Open Leads** view to see only the leads that have been assigned to them. They can then open a specific lead to view all the relevant data about that lead.

The information in individual lead rows is divided among multiple sections. Here is a description of some of the main sections and the types of information that they include:

- **Timeline-** This pane shows related lead activities. All activities appear in chronological order. Activities might include phone calls that were made to or received from the lead, appointments with the lead, internal posts that colleagues have made about the row, or notes that were added about the row.

For example, the timeline might list all the appointments that the account executive has had with the lead. The account executive can then open each appointment to gather additional information from that meeting.

- **Relationship Assistant-** This pane provides reminders or notifications about items that are related to the lead.

For example, the Relationship Assistant might provide a reminder about an upcoming appointment with the lead. The account executive can then view the appointment details by opening the row directly from the lead.

- **Stakeholders-** This grid identifies people who might have a vested interest in or be involved in the decision-making process. Typically, stakeholders are contact rows that are noted in the row.

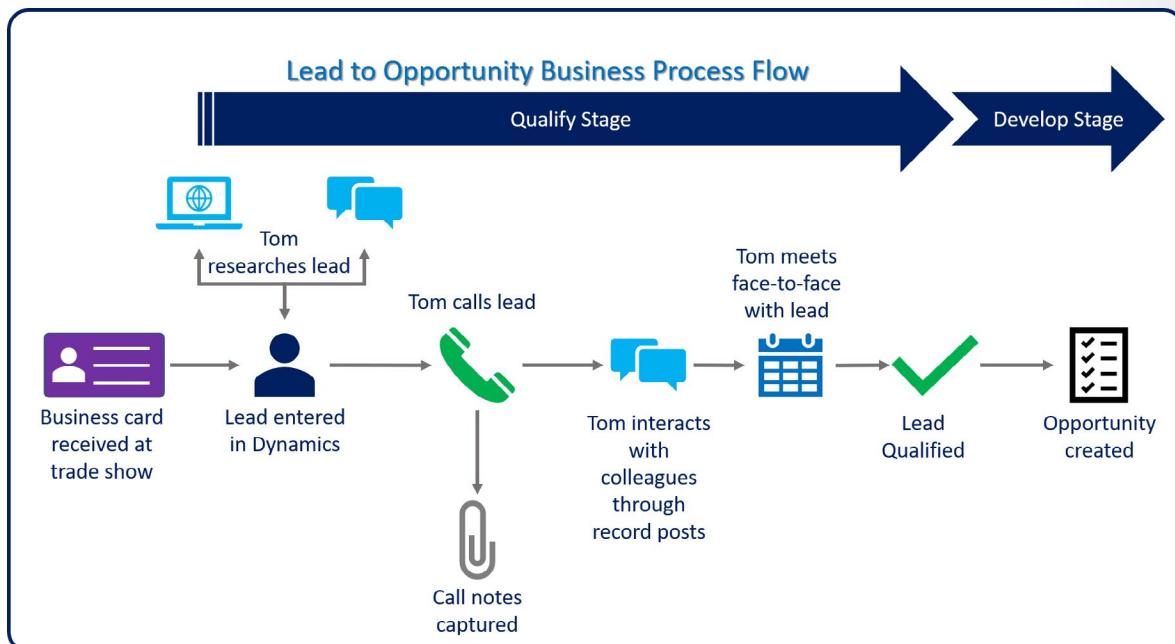
For example, a stakeholder might be a lawyer that the organization uses, a project lead, or board members who are involved in the decision-making process.

- **Competitors-** This grid identifies any other vendors that your organization might be competing with for the lead's business.
- **Business process flow-** Business process flows (BPFs) represent guided business processes that lead account executives through the whole sales lifecycle.

Depending on the type of lead, or company procedures, a lead might have multiple business processes that can be switched to, depending on specific details in the lead row. These details can include the lead source, estimated budget, purchase timeframe, or other business factors.

The screenshot shows the Microsoft Dynamics 365 Lead record page for Suzanne Jones (Sample). At the top, a red box highlights the "Lead to Opportunity Sales..." status bar with the note "Active for 9 minutes". A red arrow points from this status bar to the "Qualify (9 Min)" step in the Business Process Flow at the top of the page. The flow consists of four steps: Qualify, Develop, Propose, and Close. Below the flow, the "Timeline" section displays activity logs, and the "Relationship Assistant" section lists related events like "Next Meeting in 4 Minutes" and "Initial Discovery Meeting". A red box highlights the "Timeline" section with the note "Timeline displays activities, notes, and posts associated with the lead." Another red box highlights the "Relationship Assistant" section with the note "Assistant provides reminders on related events." A red arrow points from the "Relationship Assistant" section to the "Stakeholders" and "Competitors" sections below it, which are also highlighted with a red box and the note "Stakeholders and competitors can be defined."

Let's look at an example to see how these different types of information can be used to qualify or disqualify a new lead who has been identified.



Tom, an account executive, meets a potential customer at a trade show. Tom and the potential customer exchange business cards, and Tom enters the lead in Dynamics 365. The application then starts the **Lead to Opportunity Sales Process** BPF.

During the **Qualify** phase of the BPF, the account executive determines the viability of the lead.

1. Tom checks whether the lead is an existing customer or a new customer. If the lead is an existing customer, Tom associates the lead with the existing account and contact rows.

2. Tom uses internet searches and social networking websites to gather general information about the lead, and enters it in the lead row. This information includes the industry, number of employees, and annual revenue of the lead's organization. Tom might also use optional integrations with applications like Microsoft Social Engagement and LinkedIn Sales Navigator to help with the research process.
3. Tom calls the lead to talk about his or her current situation and potential needs. During this conversation, Tom might identify information like project stakeholders, potential competitors, budget information, or the decision-making process.
4. Tom updates the relevant information in the lead row, based on his phone call. Additional notes from the call are captured in a phone call activity that's associated with the lead.
5. Tom adds a post to the lead row. In this post, he asks whether any of his co-workers have experience with the lead. Co-worker responses to this post are captured and appear in the lead's timeline.
6. Tom schedules a face-to-face meeting with key people in the lead's organization. The Relationship Assistant reminds Tom of the meeting.
7. Tom qualifies the lead.
  - The lead row is closed.
  - A new opportunity row is created.
  - The **Lead to Opportunity Sales Process** BPF is advanced to the **Develop** phase.

At any point, lead information is available by selecting the **Qualify** phase in the **Lead to Opportunity Sales Process** BPF.

## Lead qualification

After an account executive has determined the viability of a lead, the lead can either be qualified or disqualified. By qualifying leads, you indicate that they're considered viable potential sales and are ready to move to the next phase of the sales process. By disqualifying leads, you indicate that you won't be pursuing them as customers any longer.

Although a disqualified lead might not be a good fit with your organization right now, there might still be potential to do business with that client some day. A lead who is disqualified today can be reactivated and qualified later.

## Disqualifying a lead

Leads can be disqualified for multiple reasons. Here are some examples:

- The account executive wasn't able to connect with the lead within the timeframe that was required for a specific promotion.
- The lead isn't interested in the company's products or services.
- The lead needs a product or service that the company doesn't provide.
- There's a risk that doing business with the client might not be in the best interests of one or both parties.

You disqualify a lead from the lead itself. On the command bar, select **Disqualify**, and then, on the menu that appears, select a reason for the disqualification. Four default reasons are defined:

- Lost
- Cannot Contact

- No Longer Interested
- Canceled

The screenshot shows a Microsoft Dynamics 365 Sales Hub interface. At the top, there's a navigation bar with 'New', 'Delete', 'Refresh', 'Collaborate', 'Qualify', 'Process', and other buttons. Below the navigation bar, the lead record for 'Suzanne Jones (Sample)' is displayed. A red box highlights the 'Disqualify' button in the top right corner of the lead card. A tooltip 'Lead disqualification reasons.' appears over the 'Disqualify' button. The dropdown menu is also highlighted with a red box and lists four reasons: 'Lost', 'Cannot Contact', 'No Longer Interested', and 'Canceled'. The main content area shows the lead's contact information, including topics like 'Interested in adding services (Sample)', and a timeline of recent activities such as 'Appointment from Initial Discovery Meeting' and 'Phone Call from Introduction Phone Call'.

When a lead is disqualified, the row remains in Microsoft Dynamics 365, but it's moved to an inactive state. Rows that are inactive can't be edited, but the information in them can be viewed. This behavior is by design. There are two reasons why rows are inactivated instead of deleted:

- Ensure that there is a historical record of the lead.
- Keeps the lead available for reactivated later, if necessary.

For example, leads might be disqualified for the current marketing promotion because they aren't interested in the products that are part of that promotion. But because they do own some products that your organization offers, there will probably be other opportunities for doing business with them. By disqualifying the leads instead of deleting their row completely, you retain them for future reactivation.

## Reactivating a lead

Occasionally, a lead that was previously disqualified might have to be reactivated. This might occur when, for example, someone who wasn't previously interested in your organization's products or services is now interested. In the **Closed Leads** view in the Sales Hub app, you can view any leads that have been disqualified. To reactivate a closed lead, open the lead row, and select **Reactivate Lead**. The lead is reopened and appears in the **My Open Leads** view of the original owner of the lead. The owner of the lead then can work the lead just as if it's a new lead that was assigned to him or her.



## Qualifying a lead

After a lead meets the qualification criteria that the organization set for advancement to the next phase of the sales process, it's ready to be qualified as an opportunity. To qualify leads, select **Qualify** on the command bar in the lead row. The lead is closed, and a corresponding opportunity row is created and linked to the lead row. The details of the opportunity are automatically filled in based on the values that were captured in the lead.

Unlike lead rows, opportunity rows in Dynamics 365 must be associated with a customer row. A customer can either be an individual or an organization.

- Organizations are stored in Dynamics 365 as account rows.
- Individuals are stored in Dynamics 365 as contact rows.

A contact row can be a standalone row, or it can be associated with an organization. For example, an organization that sells primarily to businesses might create a contact row for Jenny, who is a purchasing agent for an organization. In this case, Jenny's contact row will also be associated with her organization's account row. An organization that sells primarily to individuals might use just contacts in Dynamics 365 to represent the individuals that they sell to. In this case, Jenny might have only a standalone contact row.

To support both scenarios, the **Potential customer** column in the opportunity row can be set to either an account row or a contact row. If the lead is associated with an existing customer, the existing customer that's defined for the lead will be used as the customer for the opportunity. If the lead is a brand-new customer, an account and/or contact row must exist for the lead before an opportunity can be created. To help with this process, Dynamics 365 can create additional rows that can be associated with an opportunity.

The following image describes the rows that Dynamics 365 creates, depending on whether an existing account row or contact row is specified when the lead is converted.

A new account row is created only if the **Company** column in the lead row is set.

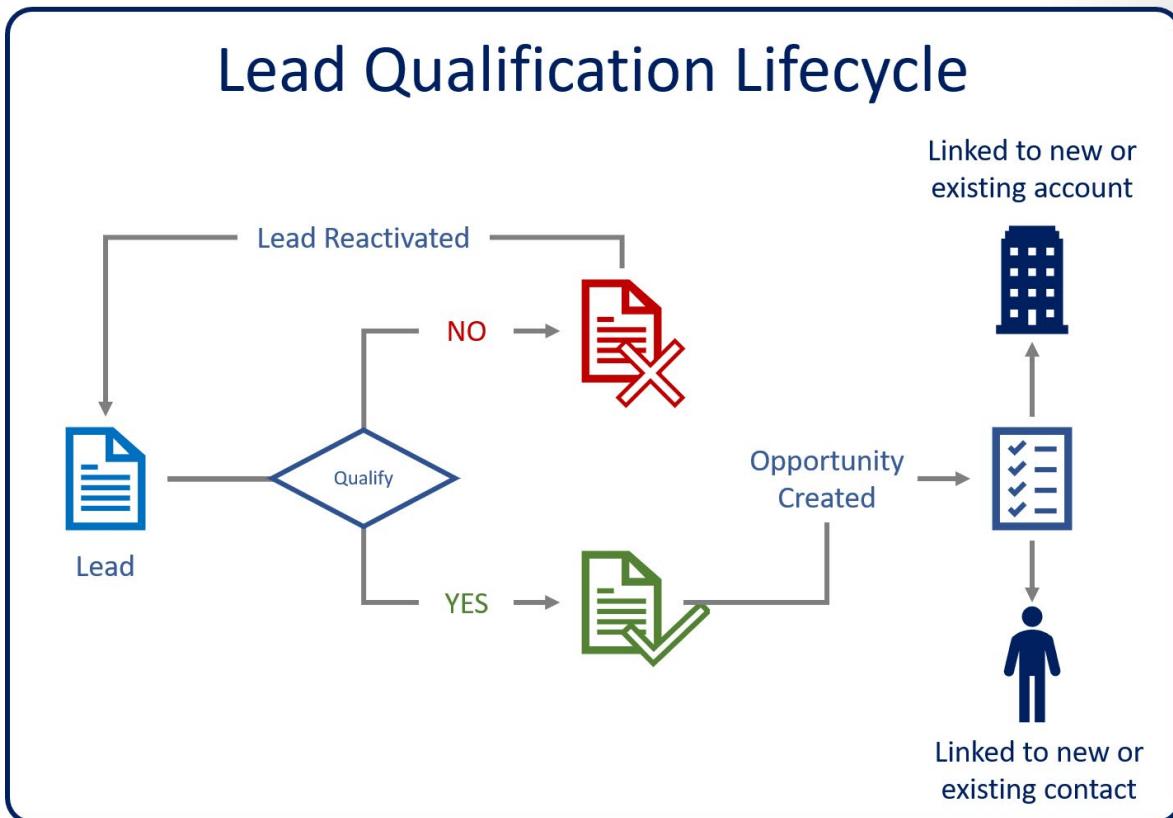
The following values on the **Lead** page control the outcome of the qualification process:

- **Title:** This value becomes the title of the opportunity that's created.
- **Name:** If this value is entered, it becomes the full name of the new contact.
- **Company:** This value becomes the name of the newly created account using the company name.

Additional data, like the customer's budget from the lead, is mapped to the new opportunity.

When an opportunity row is created from a lead, a relationship with the lead row is established and remains with the opportunity.

The following image describes an example of a lead qualification lifecycle.



Because qualified leads remain in the application and are associated with the new opportunities, they can be accessed at any time by selecting the **Qualify** phase in the opportunity's business process flow (BPF). The row for the qualified lead is opened and shows all the relevant information.

For more about qualifying and disqualifying leads: **Qualify a lead and convert it to an opportunity (Sales and Sales Hub)**<sup>2</sup>.

<sup>2</sup> <https://docs.microsoft.com/dynamics365/customer-engagement/sales-enterprise/qualify-lead-convert-opportunity-sales>

# Manage opportunities with Dynamics 365 Sales

## Dynamics 365 opportunity overview

Microsoft Dynamics 365 Sales lets organizations manage their whole sales lifecycle process, from start to finish. Although every organization is different, a typical sales lifecycle resembles the following image.



When prospects or customers express qualified interest in buying your products or services, they're considered opportunities.

An opportunity is a potential sale. Leads become opportunities after they're determined to be viable customers. Unlike lead rows, which typically include only basic information, opportunity rows provide more specific details, like potential revenue, timelines, and information about products or services.

Organizations use opportunities to forecast revenue. As opportunities are entered, the future value of their potential sales is estimated to provide a sales pipeline forecast. As opportunities are closed, the actual revenue that's generated is compared with the forecasted revenue. Working on an opportunity might involve several customer interactions, like meetings, phone calls, or tasks. Often, the sales team's effectiveness at managing this phase can make the difference between a win and a loss.

Effective opportunity management can involve several tasks. Here are some examples:

- Assigning and sharing opportunities with the most appropriate individuals or teams
- Tracking product and service details for items that the customer is interested in
- Providing the most appropriate literature to the customer
- Managing and tracking sales activities that are related to the opportunity
- Tracking stakeholders and competitors
- Moving opportunities through a sales process workflow

Opportunities are an important part of the sales process since a sales team typically spends most of its time and effort on them. In addition to opportunities, Dynamics 365 Sales includes several components that are used not only to sell to customers but to help maintain a healthy long-term relationship with customers. Here are some of the most commonly used sales components.

Term	Definition
Customer	A customer can be either an account or a contact. In business-to-business (B2B) scenarios, a customer is typically an account. In business-to-consumer (B2C) scenarios, a customer is typically a contact. For opportunities, a customer represents the potential customer that an opportunity applies to.

Term	Definition
Account	An account represents a business or organization. An account can be set as the potential customer for an opportunity.
Contact	A contact represents a single individual. A contact can be set as the potential customer for an opportunity.
Activities	An activity is a type of table that offers tracking and scheduling options. Opportunities often have multiple activities for things like tasks, appointments, and phone calls.
Business process flow	A business process flow (BPF) is a type of automation in Microsoft Power Platform. A BPF appears on a table page and gives users guidance and a predictable action plan for gathering data. For opportunities, BPFs guide users through the steps and phases that are necessary to convert an opportunity to a sale.
Lead	Leads are used to determine someone's viability as a potential customer. Qualified leads are converted to opportunities.
Product catalog	A product catalog is a collection of rows that facilitate management of products, price lists, discounts, and product families for sales transactions. Products from a product catalog can be added to opportunities as line items.
Quote	A quote is a formal offer for products or services that are proposed to a customer at specific prices and related payment terms. Quotes can be created from opportunity rows.
Order	An order is a confirmed request for the delivery of goods and services at specified terms. Alternatively, it's a quotation that has been accepted by a customer.
Invoice	An invoice is an order or a record of a sale that has been billed to the customer. It includes details about the products or services that were bought.

The following image shows an example of a sales process from beginning to end.



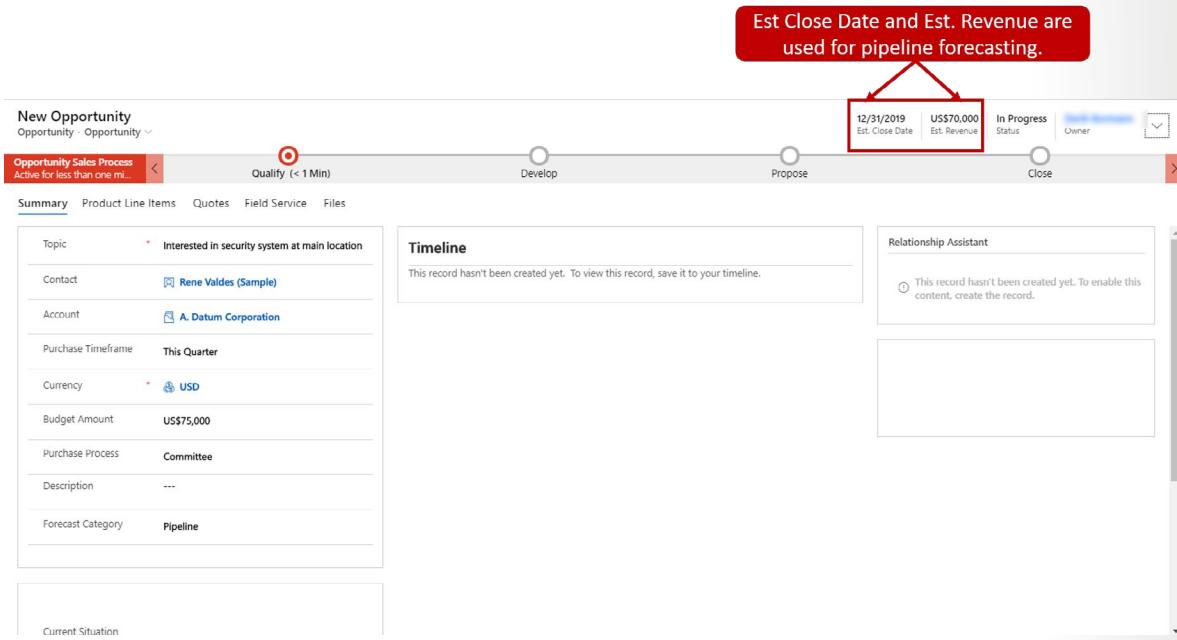
In the preceding image, a lead has contacted your organization about products and services. An account executive has reached out to the lead to gather more information about him or her, and to determine whether the lead and your organization will be a good fit for each other.

1. If the account executive determines that there's a good fit, the lead is qualified as an opportunity.
  - If the lead is an existing customer, a new opportunity is created and associated with an existing account and/or contact row.
  - If the lead is a new customer, new account, contact, and opportunity rows are created.Alternatively, if the account executive determines that there isn't a good fit, the lead is disqualified, and the sales process ends.
2. Details are added to the opportunity. These details include the products and services that the lead is interested in, the estimated revenue, and timelines.
3. A quote is added to the opportunity. The quote represents the formal proposal to the customer.
4. When the customer agrees to the quote, an order is generated. The quote and opportunity that are associated with the order are closed.
5. After the order is fulfilled, an invoice is generated to bill the customer.

## Create opportunities

An organization can create opportunity rows in many ways. An opportunity might come from an email or a phone call that was received by someone in the organization. It might be created as part of a yearly or bi-yearly sales cycle where services and/or equipment are swapped or upgraded. But most commonly, an opportunity is created by qualifying a lead.

When a lead is qualified, an opportunity row is automatically created. All the relevant information that's captured in the lead is automatically added to the opportunity. This information includes the potential customer, timeline, and budget amount. The original lead is closed, but sales staff can access it at any time by selecting the **Qualify** phase of the business process flow (BPF).



## Manually creating opportunities

You can manually create opportunities in Microsoft Dynamics 365 by using the Sale Hub app. In the Sales Hub app, open the site map, and then, under **Sales**, select **Opportunities**. Then create an opportunity by selecting **New** on the command bar. A topic, currency, and potential customer must be specified for every opportunity that's created. You define a customer by associating the opportunity with either an account row or a contact row.

When opportunities are created from qualified leads, the topic, currency, and potential customer are automatically entered.

Quick Create: Opportunity X

Details

Topic	* Interested in new security system
Contact	Rene Valdes (sample)
Account	A. Datum Corporation (sample)

Budget Amount \$75,000.00

Est. Revenue \$70,000.00

Est. Close Date 12/31/2018

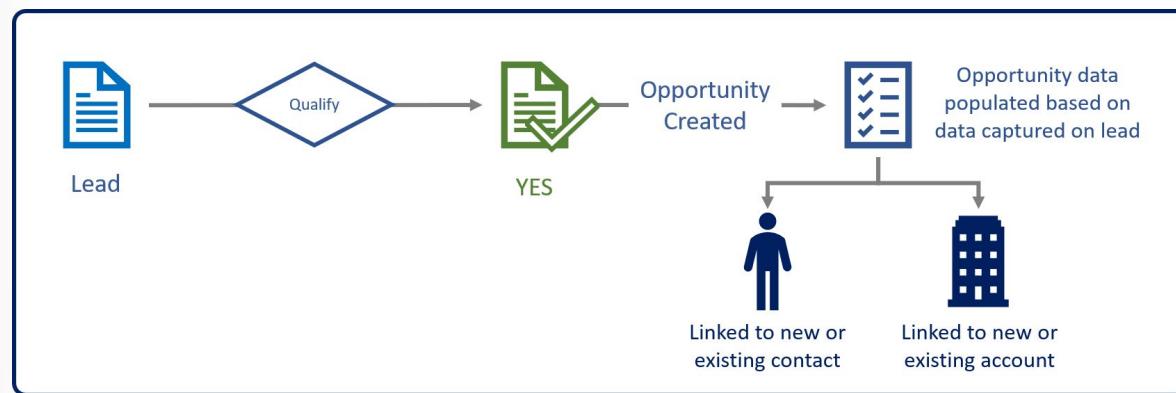
Customer Need

Needs to update existing system that is over 10 years old.

## Quick Create dialog box

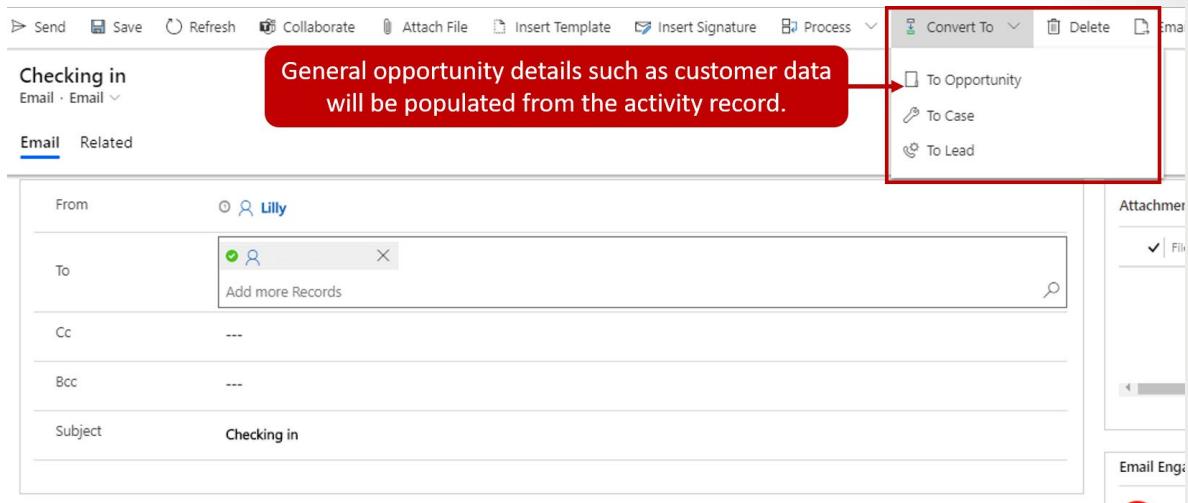
The Quick Create functionality makes it quick and easy to enter almost any type of information into the system. The Quick Create functionality can be accessed directly from the navigation bar. Therefore, it's always available whenever you need it. Just select the **New** button to open the appropriate **Quick Create** dialog box.

For example, you identify a new contact who is a stakeholder for an opportunity that you're currently working to close. Instead of going to the contact list to create a contact row, and then going back to the opportunity, you can use the **Quick Create** dialog box to add the contact while you're still on the opportunity page. After you have more information about the contact, you can go back to the contact row to fill in the appropriate additional details.



## Converting activity rows to opportunities

Another way to create opportunities is to convert existing Dynamics 365 activities to opportunities. For example, an account executive calls customers every few months to check up and see how things are going. Typically, these calls are captured in Dynamics 365 as phone call activities. During one call, a customer mentions that she must roll out a new software application during the next 12 months, and she asks for some pricing information. In this case, the account executive converts the phone call directly to an opportunity by using the **Convert To** button on the command bar of the phone call activity. Email, task, and appointment activity rows can also be converted to opportunities in the same way.



## Defining opportunity details

When you create opportunities, it's important that you define as much information as possible about the current situation and what will be required to move forward. This information can help determine which sales process should be used, based on the type, size, and timeline of the opportunity. This information can also help determine which sales resources should be assigned to the row to give your organization the best chance of winning the deal.

Here's a description of some of the main information that can be included for an opportunity.

- **Stakeholders:** Contacts in Dynamics 365 who have a vested interest in the opportunity. Stakeholders can include project managers, board members, lawyers, and sponsors.
- **Sales team:** Internal team members who will be involved in converting the opportunity to a sale.
- **Competitors:** Any external competitors that you might be competing against for the deal.
- **Pricing information:** The price lists that will be used and the calculation method that will be used to estimate the value of the opportunity.
- **Opportunity line items:** The specific products and services that are being suggested to the customer as part of the solution.

## Competitors

Knowledge about your competition for an opportunity can mean the difference between winning and losing that opportunity. This knowledge helps sales teams better position their services and products against competitors, and therefore helps improve their chances of winning.

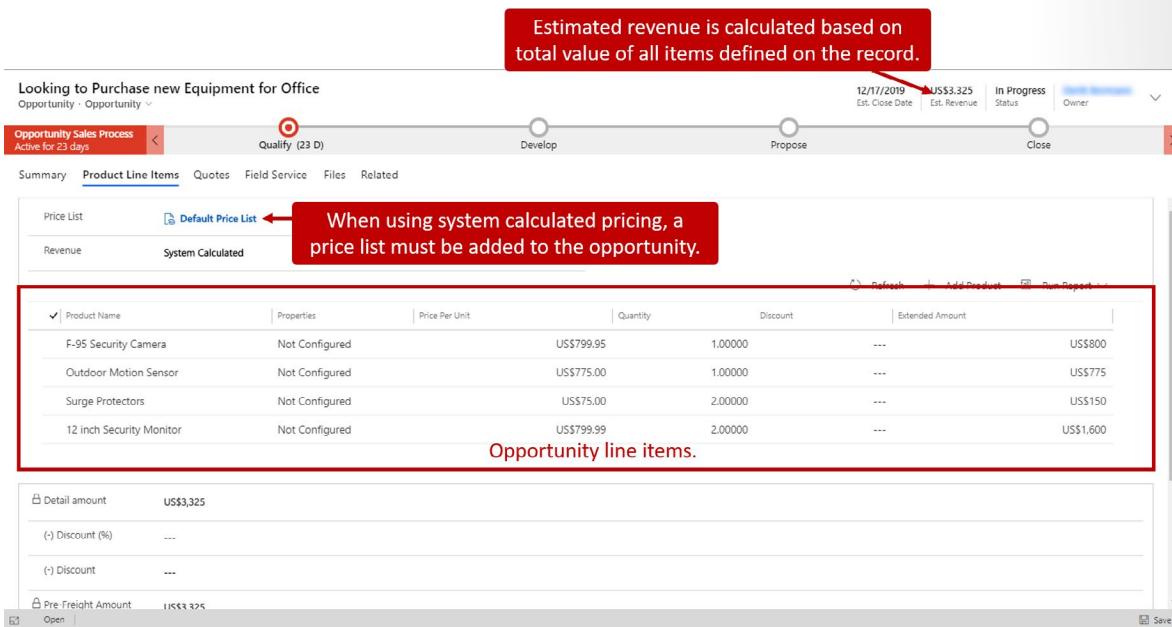
Dynamics 365 reports use competitor rows and identify who you're competing against during the sales process or who you lost an opportunity to. Therefore, these reports can give sales teams lots of information about which competitors they do well against and which ones they often lose to. For each competitor, you can document the strengths and weakness of competitors, and which of your products they compete against. You can also add related sales literature, like compete documents to educate your staff or other documents that can help sales staff compete effectively.

## Pricing and product information

One of the main advantages of using Microsoft Dynamics 365 Sales to manage opportunities is that product and pricing information can be defined in the opportunity row itself. Because quotes, orders, and invoices can pull product and pricing information directly from opportunities, definition at the opportunity level helps make forecasting more accurate.

Revenue information can be provided by the user or calculated by the system. Set the **Revenue** column to one of the following values:

- **User Provided:** The user manually enters the estimated revenue from the opportunity (Default).
  - A Dynamics 365 price list doesn't have to be added to the opportunity.
  - Line items for individual products don't have to be added to the opportunity.
  - The Dynamics 365 product catalog isn't required.
- **System Calculated:** The estimated revenue from the opportunity is automatically calculated based on the individual line items that are added to the opportunity.
  - A Dynamics 365 price list must be added to the opportunity.
  - Line items for products can be added either from current products in the Dynamics 365 product catalog or as write-in products. Product line items include the following information:
    - **Existing Product or Write in Product:** Enter the name of the product that's being added.
      - Existing products use the name that's provided in the product catalog.
      - A name can be defined for write-in products when they're added.
    - **Unit:** Enter the unit that the product should be sold in. Examples include each, pack, and case.
    - **Price Per Unit:** Enter the amount to charge per unit that's sold.
    - **Quantity:** Enter the number of units to include.
    - **Manual Discount Amount:** Enter the amount of any manual discounts that should be applied.
    - **Tax:** Enter any sales tax information.



## Existing products vs. write-in products

If you select the **System Calculated** revenue option in an opportunity row and specify a price list, you can add one or more line items to the row. Dynamics 365 can then automatically calculate the total value for the potential sale.

For opportunity rows, line items are referred to as *opportunity products*. For quotes, orders, and invoice rows, line items are referred to as *quote products*, *order products*, and *invoice products*, respectively. When you add line items, you must specify several values, like the price of the product, the quantity that's being bought, discounts, and taxes.

## Using write-in products

When you add line items to opportunities, quotes, orders, or invoices, you can select products from the specified price list. These products are referred to as *existing products*. Alternatively, you can add write-in products. Write-in products are intended for situations where a product or service that isn't currently in the product catalog must be included.

Here are two examples that show when you might use write-in products:

- You must include miscellaneous charges or fees (for example, travel-related expenses or shipping charges) on a quote, so that the customer will see a comprehensive list of all line items, even if these types of items aren't included in the product catalog.
- You must enter line items that have negative values to reflect credits. To enter a credit, add a write-in line item, enter a negative number in the **Price Per Unit** column, and enter 1 in the **Quantity** column.

## Account and team selling

Every row that's interacted with in Microsoft Dynamics 365 has an owner who is responsible for it. For example, accounts, contacts, and leads all have owners. Typically, the owner is a single user. But in large enterprise organizations, accounts might be owned by a team of users instead.

Although the primary owner of accounts and contacts might be either a single user or a team of users, the actual process of selling to a customer rarely involves just one person. Typically, sales are the result of a whole team's effort.

For example, an organization classifies any opportunity that has an estimated revenue of more than \$250,000 dollars as a high-priority opportunity. High-priority opportunities are assigned to the Hypo team, which consists of five people who work together to win those opportunities. Nevertheless, other people might be brought in at different phases to help the Hypo team. Here are some examples:

- Technical sales experts help define the scope of a project.
- Inside sales team members help with pricing-related features.
- A design team designs specific products or other items that are used in deals.
- Legal teams help guarantee that contract wording is accurate and correct.

Although the organization can easily identify the five people who make up the Hypo team, it can be more challenging to identify the technical, design, and legal team members who are required, because they can vary depending on the size, timeline, and scope of the opportunity.

Microsoft Dynamics 365 Sales provides multiple options to support teams and team selling.

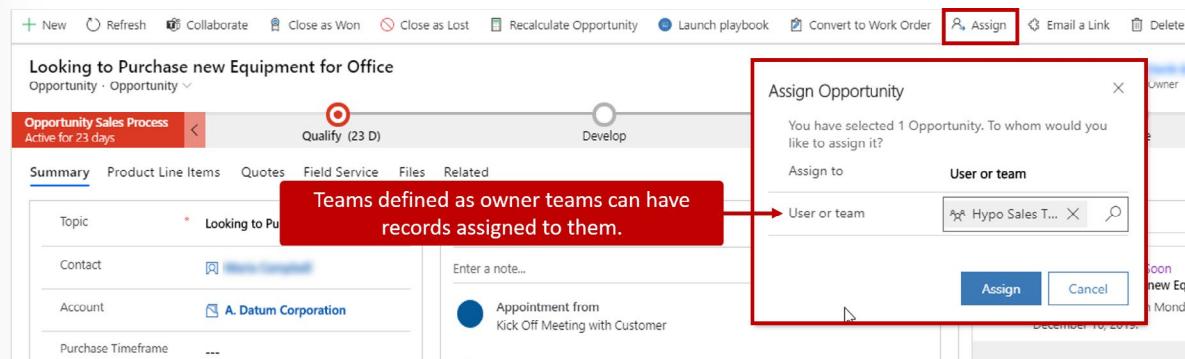
## Owner teams

Rows in Dynamics 365 can be owned by either an individual user or a group of users that's known as a **team**. Typically, teams are assigned as row owners when multiple predefined users must work on the row together. One advantage of assigning a row to a team is that all members of the team see the row in their **My Open Opportunities** view, just as if it was assigned to them individually. Another advantage is that any user who is no longer part of the team can be removed from it. Any rows that are assigned to team will still be available to the remaining team members.

Before rows can be owned by a team, you must define the team and its membership in Dynamics 365. To define a team, go to **Settings > Security > Teams**. The team that you create must be an owner team. select **owner** as the team type, and add members.

After you've defined a team and its membership, you can assign rows to the team. Select the **Assign** button on the command bar, and then, in the dialog box that appears, select the team. Owner teams are best used in scenarios where the membership of the team won't change very often.

Any users or teams that will own rows must have at least one security role assigned to them to define their security permissions in the application.



For more about owner teams, see **About owner teams<sup>3</sup>**.

<sup>3</sup> <https://docs.microsoft.com/dynamics365/customer-engagement/admin/manage-teams?azure-portal=true#about-owner-teams>

For more about defining security roles, see **Security roles and privileges<sup>4</sup>**.

## Using connections to identify sales teams

Sometimes, the people who help with the sales process don't have to own the rows themselves or to be part of a team that owns the rows. They just have to be associated with the row as part of the team. You can associate users with rows by using *connections*. For example, by default, the opportunity table lets you connect the opportunity row to users. In this way, you can identify the sales team.

Connections in Dynamics 365 are very flexible and are useful in many scenarios. They let you connect users to opportunities and specify the users' role in relation to the opportunity. Although connections are useful for identifying team members, they don't include security concepts like row ownership or access privileges. Therefore, you don't give users access to a row just by adding them to the sales team.

The screenshot shows a list of users assigned to a sales team. At the top, it says "Sales team". Below that is a search bar labeled "Search for records". The list contains two entries:

- Alex Allman, Sales Professional (User icon AA)
- Lilly Michael, Sales Professional (User icon LM)

To the right of the list is a red callout box with white text that reads: "Adding members to an opportunity sales team indicates they are involved, but does not provide the team member access to the record." A red arrow points from the text to the list of users.

If users like technical sales leads, regional managers, or product designers require access to a row, the row must be shared with them. Sharing rows with individual users can be difficult to manage and to surface visually. It can also introduce performance issues over time. In these situations, *access teams* play an important role.

Access teams provide an easy way to share business objects and collaborate with other people across business units.

Dynamics 365 Sales includes an Opportunity sales team template that provides *Read*, *Write*, *Append*, and *Append To* privileges.

<sup>4</sup> <https://docs.microsoft.com/dynamics365/customer-engagement/admin/security-roles-privileges?azure-portal=true>

The screenshot shows the 'Team template' configuration page. At the top left is a small icon of two people. Next to it, the text 'Team template' is displayed. In the top right corner, there's a button labeled 'Team templates' with a dropdown arrow and three small icons: a downward arrow, an upward arrow, and a download symbol. The main title of the page is 'Opportunity Sales Team Template'. Below the title, there's a section titled 'General'. Under 'Name \*', the value 'Opportunity Sales Team Template' is entered. Under 'Entity \*', the value 'Opportunity' is selected from a dropdown menu. The 'Description' field contains the text 'Out of box Opportunity Sales Team Template'. The 'Access Rights \*' section lists several checkboxes: 'Delete' (unchecked), 'Append' (checked), 'Append To' (checked), 'Assign' (unchecked), 'Share' (unchecked), 'Read' (checked), and 'Write' (checked). There are also back and forward navigation arrows at the bottom of the page.

When a user is added to the opportunity sales team by using connections, the app automatically adds that user to the access team for the opportunity. Therefore, the user is granted access rights only for that opportunity. If the connection is removed, the user is removed from the access team, and his or her access rights for the opportunity are revoked.

## Custom access teams

Access teams don't own rows, and security roles aren't assigned to them. They give users the flexibility to create ad-hoc security on a specific row as needed. You can manually create an access team by selecting the *Access* as the team type. Alternatively, you can use team templates to let the system create and manage the access team for you.

Manual access teams are useful in scenarios where rows must be shared infrequently with a group of users who have a specific role. For example, you can define an access team that's named *Auditors* and then share an otherwise unavailable account row with that team. In that way, you can grant the team's members specific access permissions for the account during the audit process.

A system-managed (or template-based) access team is automatically created for a specific row, other rows can't be shared with that team. You must provide a team template that the system will use to create a team. In the template, you define the table type and the access rights that the team's members will have for the row when the team is created.

Here are the steps to create template-based access teams:

- 1. Make the access team functionality available for the table:** In Dynamics 365 Sales, access teams can be used only with the opportunity table by default.
- 2. Create a team template:** The team template is where access rights are defined. An example is the predefined Opportunity sales team template.
- 3. Add a User sub-grid to the table page to manage access team membership:** In this way, the team can be manually managed for each row.

The screenshot shows two separate tables representing team templates. The first table, titled 'Sales team', has columns for 'Name' and 'Role'. It contains one row for 'William Contoso' with the role 'Sales Professional'. The second table, titled 'Accounting Team', has columns for 'Full Name', 'Site', and 'Business Unit'. It contains one row for 'Alan Steiner' with the site 'sales101'.

Sales team		...	
✓	Name	↑   Role	⬇
	William Contoso	Sales Professional	→
← ← Page 1 →			

Accounting Team		+	New User	...
✓	Full Name	↑   Site	↑↓   Business Unit	...
	Alan Steiner	---	sales101	

If different groups of users require different access rights, consider creating multiple access team templates for the table. For example, if users from the Accounts payable department must have read-only access to some types of opportunities, for financial assessment purposes, consider creating an Opportunity accounting team template that grants only *Read* privileges for the opportunity.

For more about creating team templates, see **About collaborating with team templates**<sup>5</sup>.

For more about defining access rights, see **Create a team template to control access rights for automatically created teams**<sup>6</sup>.

## Opportunity management lifecycle

It's important that sales staff have all the necessary information at their disposal. This information can often mean the difference between doing business with a customer and not doing business. For example, if an opportunity is scheduled to close this week, you'll probably want to reach out to the customer as early as possible, to make sure that you stay on top of it.

Microsoft Dynamics 365 Sales provides several tools that can help sales staff get the data that they need. Those tools include dashboards. When the Sales Hub app is first opened, the **Sales Activity** dashboard is shown. From there, sales staff can view their current sales pipeline, interact with open leads, and be alerted about information that's important to them.

One feature that alerts users about important information is the Relationship Assistant. The Relationship Assistant provides reminders about things like upcoming meetings or opportunities that are scheduled to close soon. Users can open the related rows directly from the dashboards and interact with them as needed.

## Dynamics 365 views

Microsoft Dynamics 365 provides multiple views of opportunity data. Each view is prefiltered to show opportunities in a different way. Views are another tool, in addition to dashboards, for interacting with opportunities.

You can use these views when an opportunity row is selected in the Sales Hub app. By default, you see the opportunities that have been assigned to you. But you can select different views to see different sets of opportunities.

<sup>5</sup> <https://docs.microsoft.com/dynamics365/customer-engagement/admin/about-team-templates?azure-portal=true>

<sup>6</sup> <https://docs.microsoft.com/dynamics365/customer-engagement/admin/create-team-template-add-entity-form?azure-portal=true>

Here are some of the opportunity-related views that Microsoft Dynamics 365 includes:

- **My Open Opportunities:** All the open opportunities that are assigned to the signed-in user.
- **Closed Opportunities:** All opportunities that have been closed. Both won and lost opportunities are included.
- **Lost Opportunities:** All closed opportunities that were identified as lost.
- **Recent Opportunities:** All opportunities that were recently created.
- **Won Opportunities:** All closed opportunities that were identified as won.

Account executives might use the **My Open Opportunities** view to see only the opportunities that are assigned to them or a team that they're a members of. After they find an opportunity that they want to work with, they can open it directly from the view.

## Working with individual opportunity rows

Each opportunity row includes a variety of relevant information that can be useful as the opportunity is being worked. This information is divided among multiple sections. Here is a description of some of the main sections and the types of information that they include:

- **Timeline:** This pane shows related opportunity activities. All activities appear in chronological order. Activities might include phone calls that were made or received, appointments with the customer that's related to the opportunity, internal posts that colleagues have made about the row, or notes that were added about the row.

For example, the timeline might list all the appointments that the account executive had had with the customer. The account executive can then open each appointment to gather additional information from that meeting.

- **Relationship Assistant:** This pane provides reminders or notifications about items that are related to the opportunity.

For example, the Relationship Assistant might alert you that the opportunity is set to close this week. It might also remind you about an upcoming appointment that's related to the opportunity. Appointment details can be viewed by opening the row directly from the opportunity.

- **Stakeholders:** This grid identifies people who might have a vested interest in or be involved in the decision-making process. Typically, stakeholders are contact rows that are noted in the row.

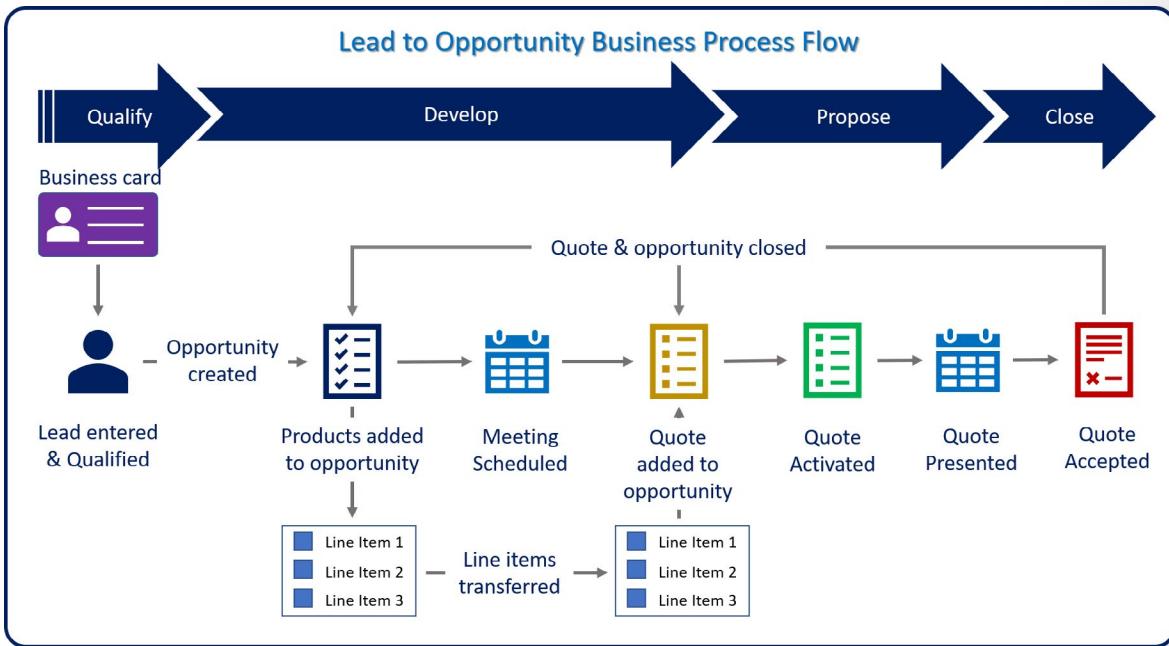
For example, a stakeholder might be a lawyer that the organization uses, a project lead, or board members who are involved in the decision-making process.

- **Competitors:** This grid identifies any other vendors that your organization might be competing with for the customer's business.

- **Product Line Items:** This grid identifies the products, services, and price list details for item that are included in the opportunity.

- **Business process flow:** Business process flows (BPFs) represent guided business processes that lead account executives through the whole sales lifecycle.

Depending on the type of opportunity or company procedures, an opportunity might have multiple business processes that can be switched to, depending on specific details in the opportunity row. These details can include the size of the opportunity, the product that's attached, or the purchase timeframe.



## Working with activities

Generally, in one way or another, most of the work that's needed to close an opportunity is done through interactions with the customer. This work is recorded in Dynamics 365 as activities. Activities can be added for an opportunity before they're finished, to track actions that must be taken. You can add specific activity types, like phone calls, emails, or appointments, or you can use a task activity to track general activities that should be performed.

For example, to call a contact about the opportunity, create an activity and note what the phone call must include. After you finish the phone call, mark the activity as completed. Some activities, like email, are automatically marked as completed when they're sent from Dynamics 365. After an activity is finished, it becomes part of the history for the opportunity. You can view the different activities that have been performed for an opportunity. You can also view them over different timeframes, like the last week or the last 90 days.

## Sales business process flows

One of the many advantages of BPFs in Dynamics 365 is that they can span multiple tables. This capability is important because an organization's sales lifecycle often spans multiple business tables. BPFs let an organization accommodate many different sales models and approaches.

For example, out of the box, Dynamics 365 Sales includes two BPFs that are focused on sales:

- **Lead to Opportunity Sales Process:** This BPF is used when an organization's sales process begins with a lead. After the lead is qualified, an opportunity is created.
- **Opportunity Sales Process:** This BPF is used when an organization's sales process doesn't begin with a lead but begins directly with an opportunity.

These BPFs follow a common pattern of four phases. The first phase is similar in both processes, but the starting point (table) differs. The remaining phases are the same.

Phase	Table	Description
Qualify	Lead (Lead to Opportunity Sales Process BPF)	If your lead isn't already in Dynamics 365 Customer Engagement apps, you must first create the lead in the system.  After you've determined that your lead is interested in your solution or product and has the appropriate purchasing power, you can qualify the lead. When you qualify a lead, it's converted to an opportunity.
Qualify	Opportunity (Opportunity Sales Process BPF)	When you start from an opportunity, you must identify the target account and contact. You can then qualify the opportunity by collecting more information.
Develop	Opportunity	During this phase, you identify stakeholders, competitors, and sales team members, and come up with a proposed solution.
Propose	Opportunity	During this phase, you develop a proposal and present it to your potential customer.
Close	Opportunity	During this phase, you must work with the customer to reach a decision within the specified timeframe and close your opportunity as either won or lost.

These phases provide a visual indicator that tells people where they are in the business process. Each phase in the BPF has steps that must be completed before the phase is complete.

BPFs are started automatically when rows are created, if an appropriate BPF is available for the user who is creating the row. If multiple BPFs are available, the BPF that's started depends on the order of the processes and user roles, as defined by customizations.

Let's look at how the combination of all the features that we've mentioned can be used to close an opportunity.

**Lost Opportunity**

Close Opportunity

Provide the following information about why this opportunity is being closed.

Status Reason	* Out-Sold
Actual Revenue	* \$0.00
Close Date	* 12/18/2018
Competitor	<a href="#">Security Now</a>
Description	---

**Won Opportunity**

Close Opportunity

Provide the following information about why this opportunity is being closed.

Status Reason	* Won
Actual Revenue	* \$5,275.00
Close Date	* 12/18/2018
Competitor	---
Description	---

Tom, an account executive, is introduced to a potential customer at a trade show. Tom and the potential customer exchange business cards, and Tom enters the lead in Dynamics 365.

1. **Qualify:** Tom qualifies the lead as a viable customer in the application.
2. **Develop:** The row is automatically advanced to the **Develop** phase when the lead is converted to an opportunity.
  1. Tom enters additional information that's needed for the opportunity, like the estimated close date, customer need, and budgetary information.
  2. Stakeholders are added. These stakeholders represent project team members, advisory board members, legal counsel, etc.
  3. Competitors are added. Competitors are other organizations that your organization is competing against for the opportunity.
  4. Product and pricing information is defined.
    - The opportunity is set to use system-calculated pricing, and a retail price list is defined.
    - Each line item is included, and pricing information is defined.
  5. A meeting with the customer is scheduled for one week from today.
  6. The Relationship Assistant reminds Tom about the appointment.
  7. During the meeting, the customer asks for a formal proposal for the solution.
  8. Tom advances the opportunity to the **Propose** phase.
3. **Propose:** A formal quote is generated and delivered to the customer.
  1. The internal sales resources that will be needed for the opportunity are defined.
  2. Sales team members are added.
  3. Optional: Access teams can be used to provide row access to the team members who are defined.

4. A quote is added to the opportunity. It includes all the products that are defined for the opportunity.
  5. A meeting with the customer is scheduled so that the quote can be formally presented.
  6. The team prepares a final presentation that's attached to the opportunity.
  7. Optional: The integration with Microsoft SharePoint or Microsoft OneDrive for Business can be used to store related documents.
  8. The quote is activated, and it's presented to the customer during the meeting.
  9. Notes about the meeting are updated.
  10. The customer accepts the quote.
  11. Tom advances the opportunity to the **Close** phase.
4. **Close:** The tasks that are required to close the opportunity are completed.
1. The final proposal is delivered to the customer and signed.
  2. The quote is converted to an order and closed.
  3. The opportunity is closed.

## Closing opportunities

Opportunities can be closed in multiple ways. For example, an opportunity can be closed when a quote that's associated with it is closed, or when an order is created from a quote. The user who generates the order is prompted to close the opportunity too.

But most often, opportunities are manually closed. To close an opportunity, select either **Close as Lost** or **Close as Won** on the command bar in the opportunity row.

When an opportunity is either won or lost, a special type of activity is generated. This activity is referred to as a *resolution activity*. It helps other, non-sales users see the types of activities that occurred with regard to a customer, beyond activities like phone calls, emails, and appointments.

Users can open the activities and see information about when the activity took place, the actual sales value. If the opportunity was lost, users can also see the possible reason why it was lost or the competitor that it was lost to.

### Lost Opportunity

Close Opportunity X

Provide the following information about why this opportunity is being closed.

Status Reason	<input type="text" value="Out-Sold"/> <span style="border: 1px solid #ccc; padding: 2px;">▼</span>
Actual Revenue	<input type="text" value="\$0.00"/> <span style="border: 1px solid #ccc; padding: 2px;">*</span>
Close Date	<input type="text" value="12/18/2018"/> <span style="border: 1px solid #ccc; padding: 2px;">* </span>
Competitor	<a href="#">Security Now</a>
Description	---

OK Cancel

### Won Opportunity

Close Opportunity X

Provide the following information about why this opportunity is being closed.

Status Reason	<input type="text" value="Won"/> <span style="border: 1px solid #ccc; padding: 2px;">*</span>
Actual Revenue	<input type="text" value="\$5,275.00"/> <span style="border: 1px solid #ccc; padding: 2px;">*</span>
Close Date	<input type="text" value="12/18/2018"/> <span style="border: 1px solid #ccc; padding: 2px;">* </span>
Competitor	---
Description	---

OK Cancel



## Module 3 Manage orders and product catalog with Dynamics 365 Sales

### Manage and organize your product catalog with Dynamics 365 Sales

#### Dynamics 365 product catalog overview

A product catalog is a collection of products and services that an organization sells and provides to customers. It includes pricing information. A typical product catalog not only includes a list of the products that an organization sells but also defines different pricing tiers, like retail and wholesale, and quantity levels on how a product will be sold.

Microsoft Dynamics 365 includes a product catalog that lets organizations create a rich product classification system that supports the following actions:

- Define a hierarchical structure of product families and products that have configurable properties (attributes). These attributes help you reduce the number of product stock keeping units (SKUs) that are required to maintain your product catalog.
- Sell individual products, or group them into bundles and kits. A bundle or a kit is a collection of products that's sold as a single unit. Product bundling is useful for grouping products in such a way that customers will benefit from the full line of products. It also lets you offer discounts on bundled products.
- Define related products in the system. (For example, these related products might be substitute, cross-sell, up-sell, or accessory products.) The related products for a product are shown to sales agents as suggestions when they add the product to an opportunity, quote, order, or invoice.
- Define multiple pricing and discounting models. You can also use custom pricing instead of the Dynamics 365 system pricing to calculate prices when you associate a product or bundle with an opportunity, quote, order, or invoice. Additionally, you can select whether to apply discounts for products at the per-unit level or the line level.
- Specify whether the price level (that is, the price list) should be automatically set for an opportunity, quote, order, or invoice, based on the user's sales territory relationship.

- Specify localized values for some product properties (attributes) to make the product names and descriptions available in user-preferred languages.

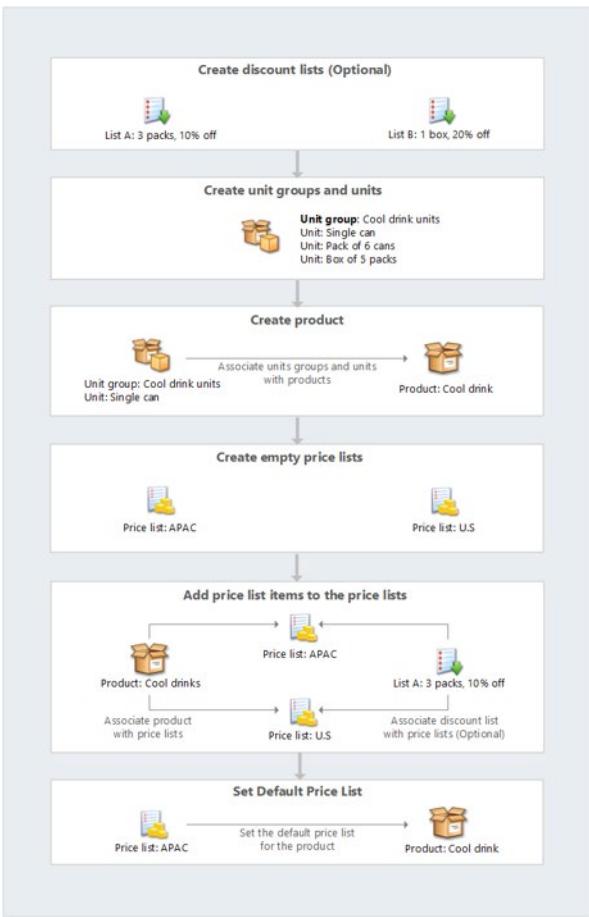
## Product catalog components

The Dynamics 365 product catalog consists of four components:

- **Unit groups:** A unit group defines how a product is packaged for sale. Among other values, it defines the units of measure that the product or service is sold in. For example, an organization that sells gaming systems might sell them individually on a crate that includes 12 individual gaming systems. An organization that provides services to customers might sell their services in increments of hours, days, or weeks.
- **Products:** A product represents the type of product that a company might keep in inventory, a product that's custom-built, or a service that's provided to a customer. For example, a beauty salon's product list might include different hairstyling products and also services like haircuts, hair coloring, and spa services.
- **Price lists:** A price list is a set of prices that are charged for products under specific circumstances. For example, an organization might have multiple price lists to accommodate seasonal variations, specials, or the different markets that the organization sells to (like government, commercial, and education).
- **Discount lists:** A discount list lets organizations offer products or services at different prices, depending on the quantity that's bought. For example, a small vendor that buys five TVs to sell in its store might pay \$350.00 per TV, whereas a large vendor that buys 500 TVs to sell in multiple locations might pay \$300.00 per TV.

Of all the components in the preceding list, only discount lists aren't required. All other components must be set up for any organization that will use the product catalog.

Because of the way that units, discounts, and prices are linked, it's important that you create the components in a product catalog in the following order.



## Currencies and currency management

Organizations that do business in multiple countries/regions often need to handle multiple currencies. Microsoft Dynamics 365 supports the use of multiple currencies in an organization and by individual users. Therefore, users can perform financial transactions like opportunities, quotes, orders, and invoices in multiple currencies.

Three components help support the Dynamics 365's multi-currency solution:

- **Base currency-** The base currency is the currency that other currencies are quoted in.
- **Transaction currency-** The transaction currency is the currency that's used for a specific transaction.
- **Exchange rates-** An exchange rate represents the number of units of a transaction currency that equals one unit of the base currency.

For example, an organization that's based in the United States defines the US dollar as its base currency. But this organization has customers in Europe. Therefore, quotes that are provided to European customers should be in euros. If the current exchange rate is 0.88 euros to one US dollar, a quote that's valued at €88,000.00 has a US dollar value of about \$100,000.00.

### Base currency

When Dynamics 365 is installed in an organization, a default currency for the organization is defined. The default currency also represents the base currency that will be used for the organization. The base curren-

cy provides a way to review and report on all monetary transactions that occur in a single currency, regardless of how those transactions were entered. After the base currency is defined for an organization, it can't be changed.

A default currency isn't required. But if a default currency isn't specified, users must select a currency every time they create a new financial transaction. If a default currency is specified, it will be used unless a different currency is specified for a specific transaction.

## Transaction currency

Different currencies can be created for an organization and used on a transaction-by-transaction basis. These currencies are referred to as transaction currencies.

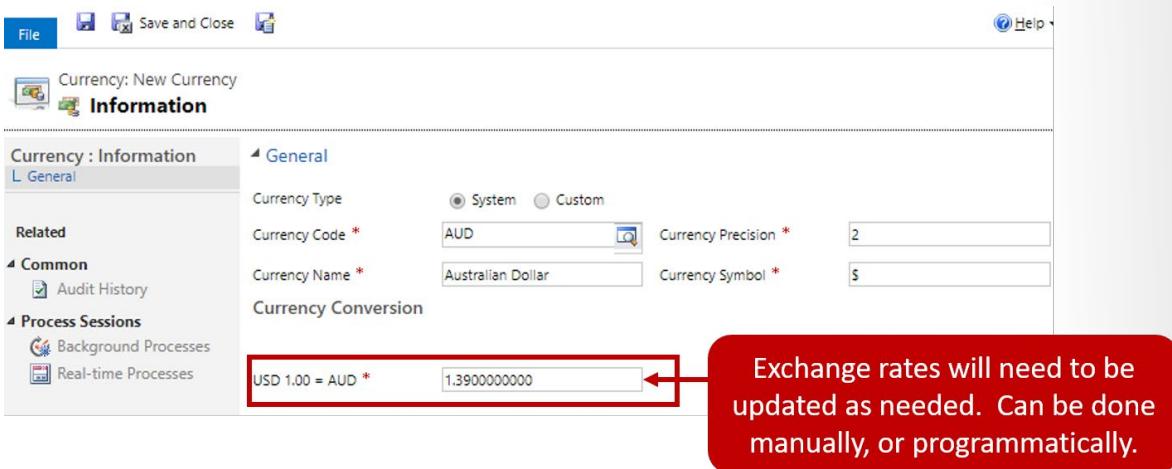
Transaction currencies let you perform these tasks:

- Select the currency that you want to define and transact opportunities, quotes, orders, and invoices in.
- Define currency exchange rates relative to the base currency.
- Define transaction currencies, and define exchange rates to associate the base currency with those transaction currencies.
- Capture the value of a transaction in both the base currency and the transaction currency in all financial transactions.
- Define product price lists for each currency.

When you set up Dynamics 365, you must define each currency that can be used in the application. To add new currencies, go to **Settings > Business Management > Currencies**.

When you define a currency, you must specify values in the following columns:

- **Currency Code:** Select the currency code that's associated with the currency.
- **Currency Name:** Enter the name of the currency.
- **Currency Precision:** Specify how many decimal places should be supported.
- **Currency Symbol:** Specify the symbol that's used with the currency.
- **Exchange Rate:** Define the currency exchange rate.
- **Currency Type:** Select whether the currency is a system currency or a custom currency.
  - **System:** Dynamics 365 has multiple predefined system currencies. Examples include *USD* for US dollars and *MXN* for Mexican pesos. For system currencies, the currency code, name, precision, and symbol are automatically filled in.
  - **Custom:** You can add custom currencies to represent any other currency that might not be in the Dynamics 365 environment. Examples include bitcoin. For custom currencies, you must manually enter the currency code, name, precision, and symbol.



After a transaction currency is created, it can be assigned as the currency on rows that are related to quotes, orders, invoices, and prices lists. For example, an account has its currency set as euros. When an opportunity is created from that account row, the opportunity inherits the currency and automatically uses euros. The currency can be changed on individual opportunities as needed.

## Exchange rates

For each currency that's defined for an organization, an exchange rate must be defined. Exchange rates aren't updated automatically for a currency. They must be updated programmatically or by other methods.

Because exchange rates frequently change, Dynamics 365 uses the following criteria to determine when the latest exchange rate should be applied to the money columns on a row:

- The row is created.
- Any money column for the table is updated.
- The state of the row changes.



## More about exchange rates

A change to a quantity in a row doesn't force the row's money columns to be recalculated based on the latest exchange rate. When the exchange rate is updated for a transaction currency, the existing rows that

the currency is assigned to aren't updated. But if a money column in one of these rows is later updated, or if the state of the row changes, the system retrieves the latest exchange rate for the currency and recalculates the row's money columns based on the latest rate. When you view a row, the monetary values that are shown are based on the exchange rate that was last assigned to the row. This rate might not reflect the latest exchange rate.

For example, when an order is created, the values of its money columns are calculated based on the exchange rate that's in effect for the assigned currency at that time. If the order is viewed ten days later, the values of the money columns still reflect the exchange rate that was applied when the order was created, even though the exchange rate that's assigned to the currency might have been updated several times since the order was created.

## Define products

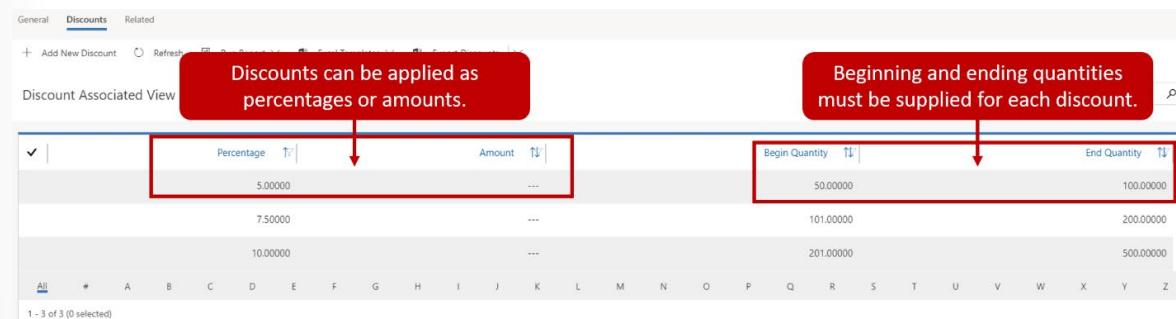
Products in the product catalog represent the individual items and services that an organization sells to its customers. A product might be used to define something physical like a printer, a shirt, or a kitchen appliance. Alternatively, it might be used to define a service that's provided, like a disposal service or consultation fee. Products can be defined individually, as families, or as bundles. Before you set up products, we recommend that you define any discounts that can be applied based on the quantities of a product that are sold.

## Discount lists

Discount lists aren't required, but they can be used to set up discounts according to the volume of products that's purchased. After a discount list is set up, it can be associated with individual items on the price lists that the organization uses. Because an organization can use many different price lists, many different pricing scenarios can be accommodated. On a price list, a discount can be applied to a price list item only for quantities that are in a specified range.

For example, your standard price list includes a TV bracket that sells for \$100.00. In this scenario, a discount list might specify that customers that buy a quantity between 101 and 500 get a 5-percent discount, customers that buy a quantity between 501 and 5,000 get a 10-percent discount, and customers that buy more than 5,000 get a 15-percent discount.

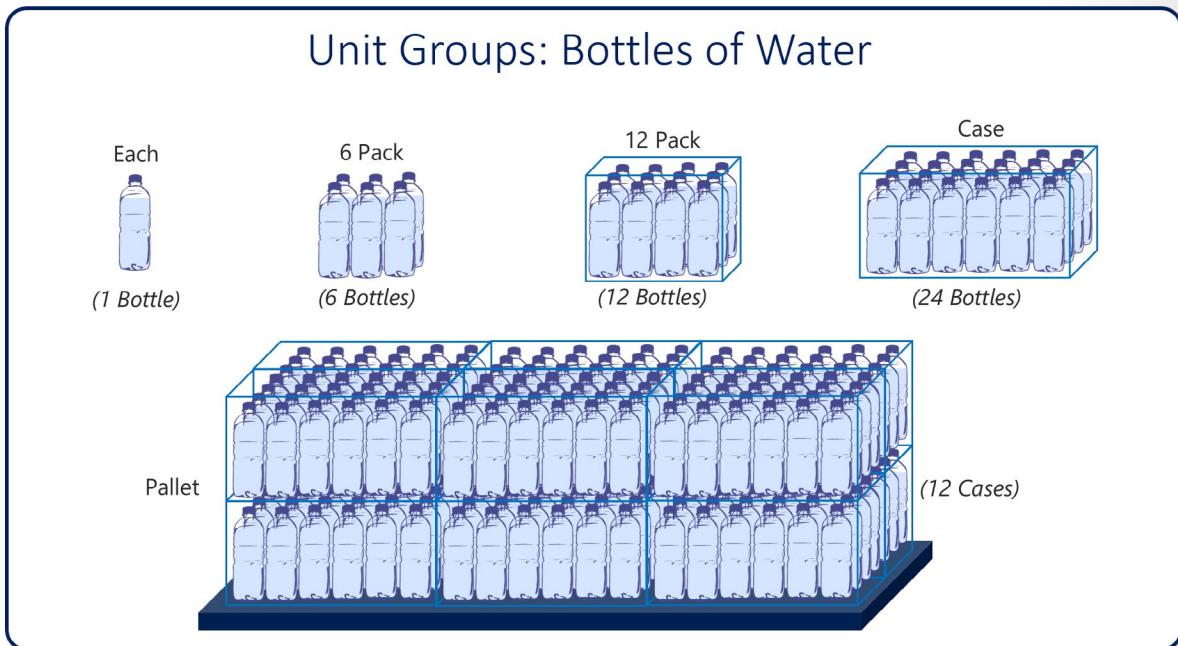
To create discounts in the product catalog, select **Discount Lists**. After you save the discount list for the first time, you can add each discount that's included on it. For each discount, you must specify a start and end quantity, and the discount amount to apply. Discounts can be defined as either percentages or amounts.



## Unit groups

Before products can be defined, an organization must define units to define how its products can be sold. Units are the quantities or measurements that you sell your products or services in. For example, an organization that sells gardening supplies might sell seeds in individual packets, boxes that have multiple packets, or pallets that have multiple boxes. Each one of those selling options represents a unit. A unit group is a collection of these different units.

Let's look at another example, where an organization sells bottles of water.



As the preceding image shows, a unit group has been created to define how bottles of water can be sold. A single bottle of water is represented by a unit of **each**. Each additional unit represents different quantities of units:

- **Each:** This unit represents a single bottle of water.
- **6-pack:** This unit represents six bottles of water.
- **12-pack:** This unit represents twelve bottles of water.
- **Case:** This unit represents 24 bottles of water.

Each of these units is based on single quantities. But your organization might also sell to wholesalers who deal in larger quantities. To handle this scenario, you can define a unit that's, **pallet**, that represents 12 cases of water.

To define unit groups, go to **App Settings** in the Sales Hub app. For every unit group, a primary unit is defined. The primary unit usually represents a single quantity of the item that's being sold. Additional units that are added are then based on a specific number of base units. For example, an organization that sells services might define *hour* as the primary unit for a unit group. This organization can then define a second unit, *day*, that represents eight hours.

The following table expands on this example.

Unit name	Base unit	Quantity (Base units)
Hour (Primary unit)	Not applicable	1

Unit name	Base unit	Quantity (Base units)
Day	Hour	8
Week	Day	5
Month	Week	4

After the different unit groups that should be available have been defined, they can be associated with individual products as they're created.

## Product configuration

Products are the backbone of any business that sells something. They can be physical products or services. Sales staff can use products from the product catalog to generate opportunities, quotes, orders, and invoices. Customer service representatives might use them when they create customer service cases. Organizations can create product families to group similar products or product bundles to group like products together to support package selling. They can also define individual products. Products can be created from the **App Settings** area of the Sales Hub app. Just select **Families and Products**.

When you define a product, you can include the following information:

Column	Description
Name	Enter the name of the product that will be used when the product is added to price lists, opportunities, work orders, orders, and so on.
Product ID	Specify the ID of the product. This ID can then be referenced when the product is added to other Microsoft Dynamics 365 rows.
Parent	This column is used when the product is associated with a product family. The value can't be changed after the row is saved.
Valid From, Valid To	Specify the date range when the product can be added to items.
Description	Enter a brief description of the product. You can use this column to provide more details.
Unit Group	Define the unit group that defines quantity information that's related to how the product can be sold.
Default Unit	Specify the default unit that will be used for the product, based on the unit group.
Default Price List	Define the price list that will be used for this product by default. Although a product can be associated with multiple price lists, it can have only one default price list.
Decimals Supported	Define the number of decimal places that can be used when the product is added to items. The precision of the <b>Quantity</b> column in the quote, order, or invoice product row is validated against the value in this column if the product doesn't have an associated price list.

Column	Description
Subject	Associate this product with a subject. You can use subjects to categorize your products and filter reports.

The screenshot shows the 'Product: New Product' screen. In the top right corner, there is a red callout box with the text: 'Available units will be based on the unit group selected'. A red arrow points from this callout to the 'Unit Group' dropdown menu, which is currently set to 'Default Unit'. Below the dropdown, another red box highlights the 'Primary Unit' checkbox, which is checked. The rest of the screen shows various product details like Name, Product ID, and Description.

## Publishing, cloning, revising, and retiring products

By default, product rows are created in a draft state. While a product is in a draft state, sales staff can't add it to items like opportunities, quotes, or orders. When you're ready to sell a product, you must publish it.

Sometimes, a product that's being created resembles an existing product but isn't the same. To save time when you create these products, you can select the **Clone** button on the command bar to make a copy of the existing product. When a product is cloned, the product details are copied to a new product row. The new product row can then be edited as needed to reflect the specific details for that product.

*Publish button only available for products in inactive or draft state*

The screenshot shows the 'Product: 21 Inch T.V. Monitor' screen. In the top left, there is a red callout box with the text: 'Creates a copy of the current product record. All fields and properties can be modified.' A red arrow points from this callout to the 'Clone' button in the command bar. The command bar also includes 'Publish', 'Preview', 'Delete', 'Refresh', 'Collaborate', 'Process', 'Email a Link', and 'Flow' buttons. The product details screen below shows the cloned product information.

After a product is published, changes (like changes to the product properties) can't be made. If changes to the product properties are required, you must select the **Revise** button on the command bar to return the product to a draft state. Changes can then be made to the product properties. After you've finished making changes, you must publish the product again so that it's available to users.

If your organization no longer sells a product, you can select the **Retire** button on the command bar. In this way, you can make sure that the product is no longer available for sales staff to use. When a product is retired, it's inactivated and can no longer be added to items like opportunities and orders. If a product that was previously retired must be available again for any reason, it can be reactivated. It's then moved back to a published state.

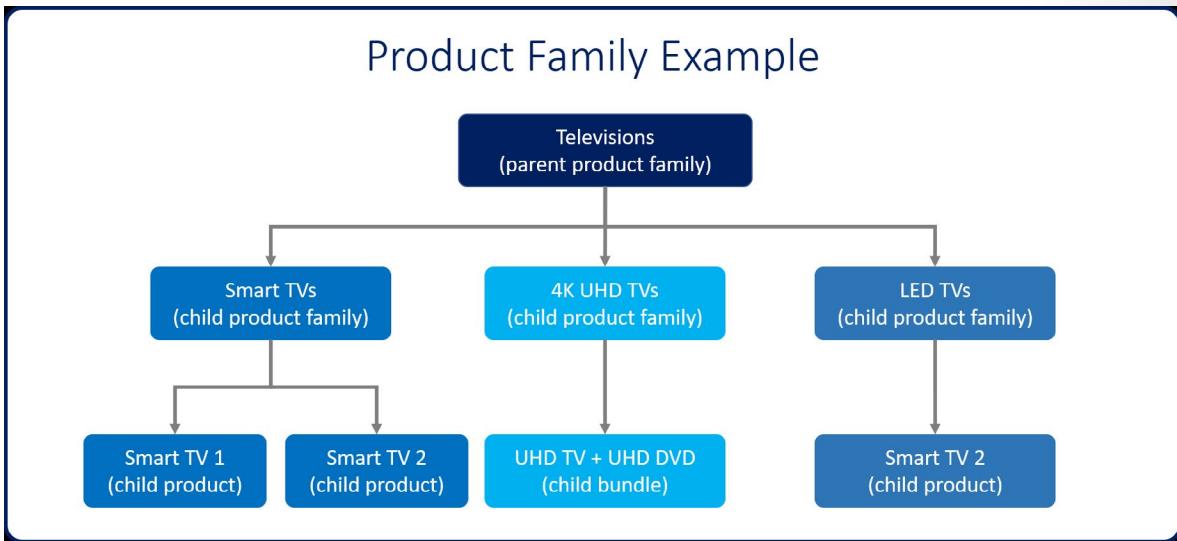
The screenshot shows the Microsoft Dynamics 365 Product page for a product named "21 Inch T.V. Monitor". The top navigation bar includes buttons for Preview, Clone, Revise (highlighted with a red arrow), Retire (highlighted with a red arrow), Delete, Refresh, Collaborate, Process, Email a Link, and Flow. A callout bubble above the Revise button says "Lets an organization make modifications to properties". A callout bubble above the Retire button says "Deactivates a product so it is no longer presented to end users". The main content area displays product details: Name (21 Inch T.V. Monitor), Product ID (TV-1234), Parent (---), Valid From (---), Valid To (---), and Description (---). There are also small calendar icons next to the Valid From and Valid To fields.

## Product families

Product families make it easier for sales staff to find products and services in a product catalog. They let you create and categorize similar products together, based on commonalities between them. For example, an auto dealership might have product families like *sports car*, *truck*, and *SUV*. By combining each car with other cars in the same category, the organization can analyze sales trends by category. It can also analyze product properties across products within the product family. For example, a specific model of truck might have different interior and exterior colors, or it might be available in two-door or four-door models. Product families let the dealership define those options at the family level, so that sales staff can choose the specific options when an individual vehicle is selected.

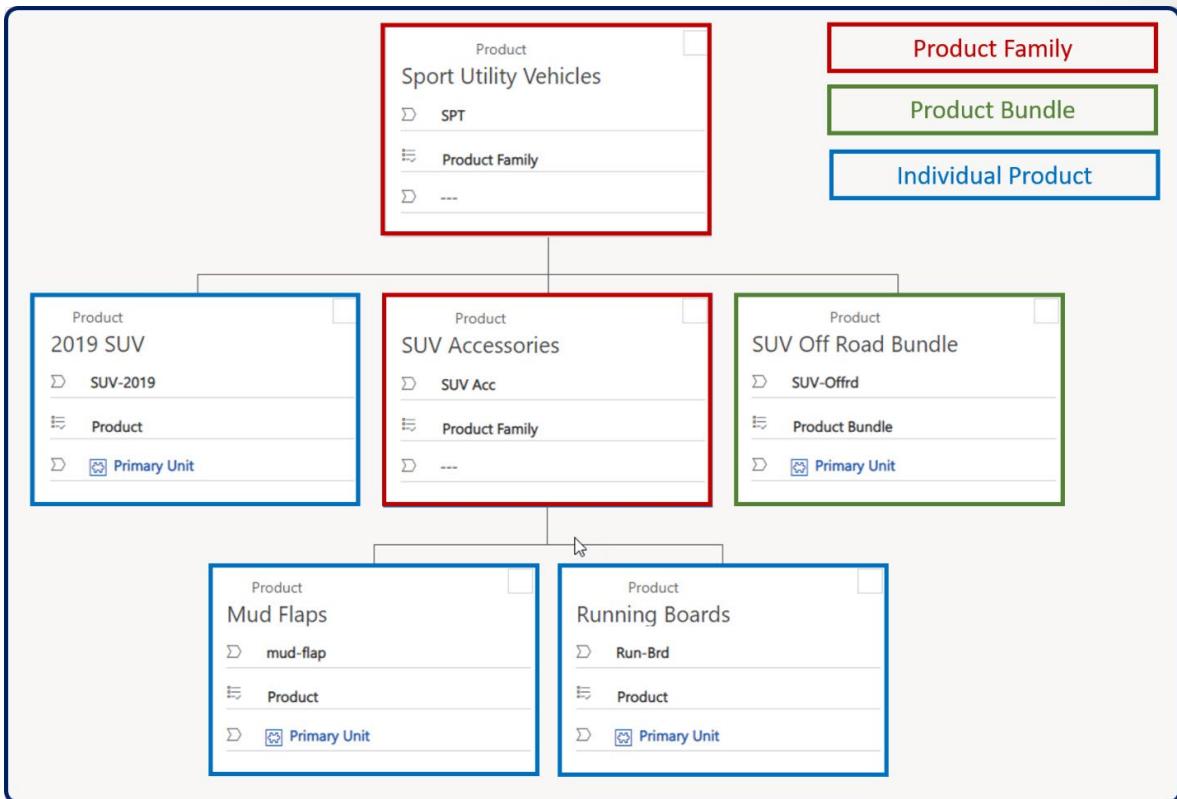
Product families let an organization perform these tasks:

- Categorize products in whichever way is most meaningful for it.
- Create child products and product bundles within a product family.
- Create as many levels of product families as it wants by creating a family within a family.



## Viewing a product hierarchy

In addition to grouping similar items together, product families create a hierarchy that provides a visual snapshot of the products that an organization sells. Therefore, it's easy to see what products are available to sell and how they're connected.



## Product properties

Another advantage of product families is that you can define properties to help distinguish products. For example, a property can be used to offer size or color options for shirts that belong to the same family.

Properties can be defined at the family level only when the family is in a draft or revision state. To define properties, select the **Add New Property** button. Any child products, bundles, or child families will automatically inherit the properties from their parent family.

When a property is created, you must define the following details:

- **Name:** Enter the name of the property that will be presented to users when they set it.
- **Read-Only:** Specify whether users can edit the property.
- **Required:** Specify whether a value must be defined for the property.
- **Hidden:** Specify whether the property will be hidden to users when it's consumed.

For each property that's defined, a data type must be defined on the **Properties** tab. The data type determines the type of data that can be captured for the property. The data can be an option set, a decimal number, a floating-point number, a single line of text, or a whole number. Depending on the data type that's selected, additional options might be available for the property. For example, a property that defines the colors that a car line is available in might be set to a data type of *Option Set*. After the row is saved, each color option must be added as property option set items.

The screenshot shows the 'Color' property in the 'Properties' tab. The 'PROPERTY TYPE' section indicates 'Data Type' is set to 'Option Set'. A red callout box points to the 'Default Value' field, which contains 'White', with the text: 'A default value can be specified based on the values added'. Below this, the 'Property Option Set Items' grid lists five items: White (Value 1), Red (Value 5), Green (Value 4), Blue (Value 3), and Black (Value 2). A red callout box points to the 'New Property Option ...' button with the text: 'Each option available to select must be added as an option set item'.

Name	Value
White	1 ---
Red	5 ---
Green	4 ---
Blue	3 ---
Black	2 ---

When individual products are added to items like opportunities, quotes, and orders, users can define the available values for each property that's defined for the product family. Just select the **Edit Properties** button in the **Line items** sub-grid.



## Product bundles

A bundle is a collection of products that are sold as a single unit. From within a bundle, users can see all the products that are included in the bundle.

Here are some of the scenarios where product bundling can be useful:

- You want to pair a top-selling product with a less popular product.
- You want to group products in such a way that customers will get more benefit from the full line of products. Examples of this use of product bundles include Microsoft 365 and a digital camera that comes with lenses.

Associated Product	Quantity	Unit	Required
2020 SUV	1.00000	Primary Unit	Required
Running Boards	1.00000	Primary Unit	Required
Mud Flaps	1.00000	Primary Unit	Required

Although the products in a bundle are typically sold together, specific products in a bundle can be marked as optional. These products can also be sold individually.

After a product bundle has been activated and associated with a price list, it can be added as a line item on rows like opportunities, quotes, and orders. Bundles can also be expanded to show the specific items that are included in them.

Product Name	Properties	Price Per Unit	Quantity	Discount	Extended Amount
SUV Off Road Bundle	Edit	\$37,500.00	1.00000	---	\$37,500.00
2019 Suv	Edit	Primary Unit	\$0.00	1.00000	\$0.00
Running Boards	Edit	Primary Unit	\$0.00	1.00000	\$0.00
Mud Flaps	Edit	Primary Unit	\$0.00	1.00000	\$0.00

## Defining related products

Many products have some type of association with other products that an organization sells. For example, when a product like a TV is sold, sales representatives can be presented with potential upgrade models as an upsell opportunity. Product relationships can not only help with upsell opportunities, but they can be used to offer substitute products, recommend accessories, or help with cross-sell opportunities.

Related products can be defined for individual product rows or product bundles, but they can't be defined for a product family. To add a relationship, select **Product Relationships** on the **Related** tab. Then select the **Add New Product Relationship** button.

When you define a product relationship, you must include the following information:

- The product that the relationship is being created for.
- The related product the product is being associated with.
- The type of relationship. You can select *Up-Sell*, *Cross-Sell*, *Substitute*, or *Accessory*.
- The direction of the relationship:
  - **Uni-directional:** The relationship is available only from the product.
  - **Bi-directional:** The relationship is available from both the product and the related product.

Quick Create: Product Relationship ×

Product	*  2019 SUV
Related Product	*  Running Boards
Sales Relationship Type	* Accessory
Direction	* Uni-Directional

During opportunity or order management, the related products are shown as suggestions. These suggestions help sales staff recommend related products and bundles/kits to customers. Therefore, they can help increase product sales.

## Price lists

Organizations might sell products and services to many different types of customers. Depending on the type of customer, different pricing options might be used. For example, retail pricing for individual consumers is generally higher than wholesale pricing for distributors, because distributors typically buy in larger quantities and more often. For each product that an organization sells, it might have to define different levels of pricing, depending upon the customer.

Properties can only be added to product families that are in a draft or revision state. To provide the pricing options that organizations require, the Microsoft Dynamics 365 product catalog includes price lists. A price list is best described as a level of pricing that you give to specific types of customers. Most organizations create multiple price lists to support the different selling scenarios that they use.

Here are some scenarios where multiple price lists might be used:

- The organization sells both directly to customers and through a network of resellers. In this case, the organization can create retail and wholesale price lists.
- You must create price lists that are used only in a specific marketing campaign.
- You must create custom price lists for specific customers, like contract or preferred customers.

Let's look at a more detailed example, where an organization manufactures mattresses and sells its products to three different types of customers.



- Retail customers:** Customers who buy directly from the retail website pay \$750.00 per mattress.
- Wholesale customers:** Retail store chains that buy directly from the organization so that they sell the products in their stores pay \$600.00 per mattress.
- Distributors:** Customers who buy directly from the organization so that they can sell the products to other retailers pay \$500.00 per mattress.

To accommodate this scenario, create price lists that are named *Retail*, *Wholesale*, and *Distributor*, and add the mattress to each price list as a price list item. The amount that's charged for the mattress will differ on each price list. Not all organizations need multiple price lists. Some might sell only to retail customers and have only one pricing level. In those instances, only one price list is required, and any product that the organization plans to sell is added to that price list.

Price lists are generally the last item that's set up in the product catalog. They link the unit, product, and pricing details together. Therefore, before you create price lists, make sure that the units and products are defined.

## Creating price lists

Price lists can be created from the **App Settings** area of the Sales Hub app. When you create a price list, you must enter a name for the price list, like *Retail*, or *Wholesale*. You must also define the currency to

use with the price list. By default, price lists use the base currency that's defined for an organization. Additionally, if the price list will be used for special pricing during a marketing campaign or promotion, you must specify the start and end dates. In this way, you help guarantee that the price list will be used only during the appropriate times.

New Price List

General    Price List Items    Territory Relationships

Name: Spring Campaign

Start Date: 3/1/2020

End Date: 3/31/2020

Currency: USD

Description: This price list will be used to support pricing promotions that will be offered to customers as part of our "Spring into Savings" campaign.

Status: Active

## Defining price list line items

After you've saved a price list for the first time, you can define individual price list line items by selecting the **Add new price list item** button on the **Price list items** tab. When an item is first added, you can define the following values:

- **Price List:** Specify the price list to add the line item to.
- **Product:** Define the product from the product catalog to associate the line item with.
- **Unit:** Define the unit of measure to use with the line items, based on the unit group that's associated with the product.
- **Discount List:** Define the discount list to use if the line item requires any volume discounts.
- **Quantity Selling Option:** Define whether the item can be sold whole or in fractional amounts.

Pricing information for each line item is defined on the **Pricing** tab on the **Price List Item** page. The first and most important column that you must define is the **Pricing Method** column. This column defines the actual price of the item for this price list. The following options are available:

- **Currency Amount:** Select this option to ignore a product's list price in the product catalog and manually enter a different price for this price list.
- **Percent of List:** Select this option to calculate a product's price on the price list as a percentage of its list price.
- **Percent Markup - Current Cost:** Select this option to add a percentage markup on top of the current cost that's entered in the product catalog.
- **Percent Margin - Current Cost:** Select this option if the price that's offered on the price list should yield a percentage margin of the current cost.
- **Percent Markup - Standard Cost:** Select this option to add a percentage markup on top of the standard cost that's entered in the product catalog.
- **Percent Margin - Standard Cost:** Select this option if the price that's offered on the price list should yield a percentage margin of the standard cost.

## New Price List Item

General    Pricing information

Pricing

Pricing Method	*	Currency Amount	
Amount	*	Currency Amount	
<input type="checkbox"/> Percentage		Percent of List	
		Percent Markup - Current Cost	
		Percent Margin - Current Cost	
		Percent Markup - Standard Cost	
		Percent Margin - Standard Cost	

Rounding

<input type="checkbox"/> Rounding Policy	---
<input type="checkbox"/> Rounding Option	---
<input type="checkbox"/> Rounding Amount	---

Additional pricing methods might be available, depending on the Dynamics 365 application module that's installed. For example, the Microsoft Dynamics 365 for Field Service solution adds some options that pertain specifically to service-related products.

## Assigning price lists to territories

Some organizations might use different pricing options, depending on geographic regions or territories. The product catalog can accommodate these scenarios by letting you add default price lists for territories or customer segments that the agents are managing. When a price list that's defined as the default list for a territory offers any new items in that territory, like an opportunity, the default price list is used. A different price list can then be selected as needed.

The screenshot shows the 'Territory Relationships' tab selected in the 'Price List' section of the 'Spring Campaign' page. A red callout box highlights the 'New Connection' button in the command bar, which is used to associate a price list with a territory. The territories listed are North East and South East.

## Inactivating price lists

When a price list is no longer valid, it can be inactivated by selecting the **Deactivate** button on the command bar of the price list. For example, a company had an introductory price list for a product launch. After several months, the introductory offer is over, and the price list is no longer valid. In this case, you can deactivate the introductory price list so that it can't be applied to any products.

# Process sales orders with Dynamics 365 Sales

## Sales order processing overview

Dynamics 365 lets you manage an organization's entire sales lifecycle process from generation of leads to order management and invoice processing. How much an organization elects to use depends on the organization. Many organizations have an existing Enterprise Resource Planning (ERP) software platform that is used for accounting, inventory management, and purchasing. In this instance, it's not uncommon to integrate the sales order processing capabilities of Dynamics 365 with an external application.

When Dynamics 365 Sales is integrated with an external application, lead and opportunity management will generally be handled in Dynamics 365. Quotes, orders, and invoices will likely be created in the external application. However, sometimes organizations may elect to use quotes in Dynamics 365 and integrate only orders and invoices.

This is true whether you plan to use sales order processing entirely from Dynamics 365 or only integrate specific components, such as orders and invoices. It's important to understand the components that make up sales order processing, how they flow together, and what is available for each one.

The following image shows a typical flow.



1. **Lead** - A lead represents some type of potential. This is potential interest in a product or service, or the potential of becoming a customer. Leads are typically the beginning of a sales process. Sometimes there are no prior relationships with a lead, and sometimes leads are used with existing customers. For example, a salesperson might create a lead for someone they met at a tradeshow or a lead might be purchased and imported into Dynamics 365. Once the viability of the lead as a customer has been determined, leads are qualified or disqualified.
2. **Opportunity** - An opportunity is a potential sale with someone that is a viable customer. Opportunity rows are associated with either an account or contact row. Opportunities are often created from qualified leads, but they can represent the beginning of a sales process as well. Opportunities include estimates of revenue and timelines. We use opportunities to populate an organization's

sales pipeline, so they can measure the value of their potential sales and when these sales are scheduled to be closed.

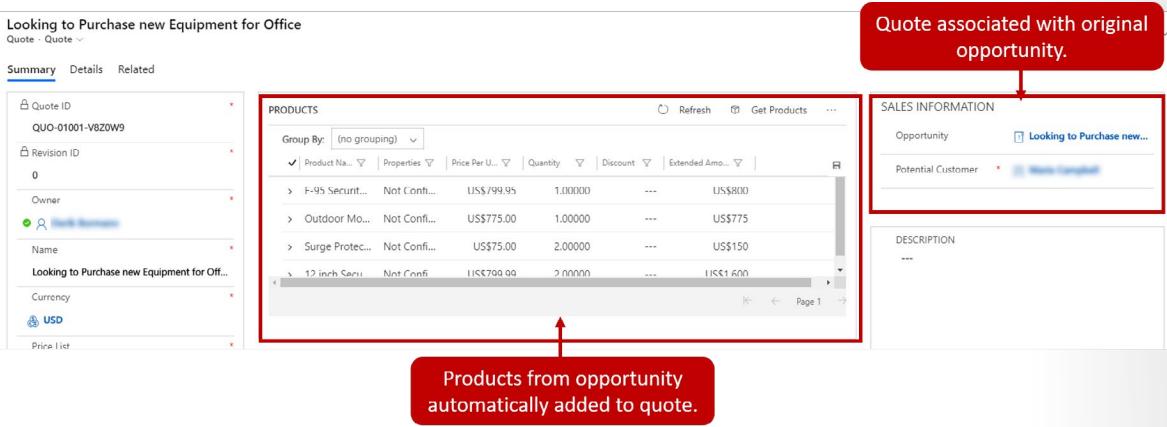
3. **Quote** - A quote is a formal offer for products or services, proposed at specific prices and related payment terms to a customer. For example, if a customer is asking for an estimated cost for new computers in an office, a quote would be created to track this information. On this quote, there could be multiple line items where each of the products, quantities, and prices are calculated and tracked. Within Dynamics 365, these line items are referred to as quote products.
4. **Order** - An order is a confirmed request for delivery of goods and services based on specified terms or a quote that has been accepted by a customer. Like a quote, the order can have multiple line items associated with it where the quantity, price, and products being sold can be tracked. Additionally, for organizations that have Microsoft Dynamics 365 integrated with accounting applications, orders are a common point of integration. This is common in scenarios where a salesperson would submit an order for a customer and the accounting team would handle the invoicing from that point forward.
5. **Invoice** - An invoice is an order that has been billed to the customer. It's also a record of a sale to an account, including details about the products or services purchased. For organizations that have integrated Microsoft Dynamics 365 with an accounting application, this is also a common integration point. However, in integrated scenarios, invoices are pushed from the accounting application to Microsoft Dynamics 365. This is because while properly billing a customer is part of the overall customer relationship management process, it's primarily an accounting-related function. However, it's still important for those responsible to be aware of what customers might owe and have paid.

## Quotes and quote management

Opportunities provide account executives and sales teams with an avenue to work on the specific details about a proposed solution for a customer. When a customer is ready for a formal proposal that contains the most current pricing information and product quantities, they are generally presented with a quote.

### Creating quotes

Quotes can be created manually, however, the easiest way to create a quote is directly from an opportunity. Quotes can be added from the **Quotes** tab on an existing opportunity row. One key advantage of generating a quote from an opportunity is that the quote will be pre-filled with important details from the opportunity row, such as pricing information and any attached line items.



## Working with quote products

As mentioned previously, when the quote is first created for an opportunity, product line items on the opportunity will be added to the quote. All the products attached to the quote will be displayed in the product sub-grid. Individual product line items can be added and removed as needed. Products can be added manually by selecting the ellipsis (...) and choosing to add a new quote product. This opens the **Quick create** form where the product can be added like it would for an opportunity.

Sometimes it's easier to add a product from an existing opportunity row. For example, an organization might have two separate opportunities opened for a customer. The customer might ask to quote both opportunities together. In this instance, the products from the second opportunity could be added to the existing quote. To add products from your opportunity to your quote, select **Get Products** from the command bar on the **Quote** form. When the **Get Products** page opens, you can select the opportunity that contains the products that you want to add.

**Get Products** simply copies the product line from an opportunity to the quote. It does not check to see if a product is already on the quote. It is possible to add the product line item multiple times. After the products have been added, double check to ensure that you do not have any items listed twice that should not be.

Line items can be edited from the products sub-grid by selecting the item and choosing to edit. Additionally, products can be removed by selecting the ellipsis (...) and then selecting **Delete quote product**.

As line items are being added, make sure that the quote and all line items are using the same currency. For example, if your quote has the currency set to US dollar, you must use the same currency for the price list items that you add to the quote. You cannot change the currency of the quote unless you remove all the line items associated with the row. Similarly, if the quote is created from an opportunity, it must use the same currency as the opportunity.

When your quote is ready to send to your customer, it can be activated using the **Activate Quote** button.

## Sending quotes

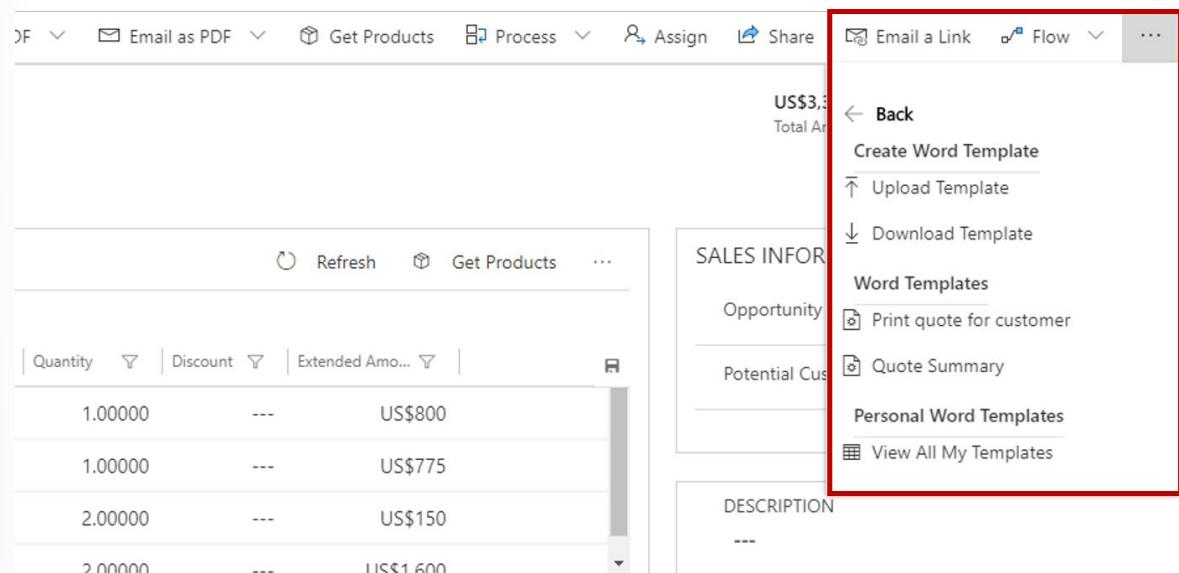
When a quote is created it has a status of Draft. Draft quotes can be modified and have products added or removed. When the quote is ready to be presented to a customer, it needs to be activated. An activated quote is read only. This is part of a conventional sales process and can be used

to ensure that the terms of the quote are clearly understood by both parties on the potential transaction.

After a quote is active it is ready to be presented to the customer.

Quotes can be generated as Microsoft Word documents. To generate a quote for the customer, select **Word Templates** from the command bar, and choose

**Print quote for customer**. A Word document will be created that you can print or save as a PDF, and send to your customer.



## Revise a quote

Typically, the first version of a quote presented to the customer is not generally the version they end up signing. It is very common for a customer to request that a specific product be removed, or to have quantities adjusted. For example, the quote may include ten security cameras, but the customer decides they want to start with five cameras.

When a quote is activated it cannot be edited. Any changes that need to be made must be done as revisions. Revisions are done by selecting the **Revise button** on the command bar. When a quote is revised, the original version of the quote is closed, and a new version is created with an updated revision number. This ensures that all previous versions of the quote are accessible at any time. After the necessary changes have been made, the updated quote can be activated so it can be presented to the customer.

Creates a new quote version, and cancels the original.

New Delete Refresh Collaborate Create Order Revise Close Quote Create PDF

Looking to Purchase new Equipment for Office

Quote · Quote

Summary Details Related

Quote ID
QUO-01001-V8Z0W9

Revision ID
1

Owner
[User Icon]

Name
Looking to Purchase new Equipment for Off...

PRODUCTS

Group By:	(no grouping)		
Outdoor Mo...	Not Configured	US\$799.95	1.00000
Surge Protec...	Not Configured	US\$75.00	2.00000
12 inch Secu...	Not Configured	US\$799.95	2.00000

## Closing quotes

After a quote is accepted, an order can be generated. The order helps fulfill the agreement of goods or services offered in the quote. The process of converting a quote to an order is done by selecting the **Create order** button on the command bar. When the order is created, the contents of the quote are added to the order row and the quote is closed. Additionally, if the quote was generated from an opportunity, you can select to close the opportunity as well. It is important to note that after a quote is accepted, you will not be able to revise it.

The image displays two side-by-side dialog boxes from a software application. The left dialog is titled "Create Order Screen" and the right one is titled "Close Quote Screen". Both dialogs have a dark blue header bar with the title and a close button (X) in the top right corner.

**Create Order Screen:**

- Header: "Create Order" with a close button.
- Text: "Use this quote to create an order."
- Form fields:
  - Status Reason: \* Won
  - Date Won: \* 12/19/2018 with a calendar icon
  - Description: ---
  - Close Opportunity: \* Yes
  - Calculate actual revenue from quotes: \* Yes
- Buttons: OK and Cancel at the bottom.

**Close Quote Screen:**

- Header: "Close Quote" with a close button.
- Text: "You're closing this quote."
- Form fields:
  - Status Reason: \* Lost
  - Close Date: \* 12/19/2018 with a calendar icon
  - Description: ---
  - Create a revised quote: \* Yes
- Buttons: OK and Cancel at the bottom.

Quotes can also be closed without an order being generated. This is usually done in scenarios where an organization loses a deal for some reason. This is also done from the command bar, by selecting the **Close quote** button.

## Orders and invoices

Following the quote lifecycle, if the customer is ready to progress they will likely place an order with your organization. An order is a request from a customer to buy products or services. Typically, quotes that are accepted lead to an order. However, there are times when an order unrelated to a quote may need to be created.

### Create an order from a quote

The process of converting a quote to an order is done by selecting the **Create order** button on the command bar. When the order is created, the contents of the quote are added to the order row and the quote is closed. The products and items on the order can be edited as needed.

## Manually create an order

Order will contain all line items defined on the quote.

The screenshot shows the 'Create Order' button highlighted with a red box and an arrow pointing to it. The interface includes a navigation bar with 'New', 'Delete', 'Refresh', 'Collaborate', 'Create Order' (highlighted), 'Revise', 'Close Quote', 'Create PDF', and a dropdown menu. Below the navigation is a title 'Looking to Purchase new Equipment for Office' and a subtitle 'Quote · Quote'. A tabs section shows 'Summary' (selected), 'Details', and 'Related'. On the left, a 'Quote ID' field contains 'QUO-01001-V8Z0W9'. A 'Revision ID' field contains '1'. An 'Owner' field shows a user icon and a blurred name. A 'Name' field contains 'Looking to Purchase new Equipment for Off...'. On the right, a 'PRODUCTS' section lists four items with columns for Product Name, Properties, Price Per Unit, and Quantity. The first item is 'F-95 Securit...', the second is 'Outdoor Mo...', the third is 'Surge Protec...', and the fourth is '12 inch Secu...'. All items have 'Not Config...' under Properties, US\$799.95 or 775.00 under Price Per Unit, and 1.00000 or 2.00000 under Quantity.

There is no requirement that states that a quote is needed before an order is created. If a customer communicates that they are ready to place an order now, you can skip the quote process and create an order.

When you create an order manually, you will need to specify the potential customer, name, and price list information. You will also need to provide address information. Select the **Look Up Address** button to select the customers address to use for the order. If a customer has multiple address, you can select which addresses to use for the order. After the **Bill to address** and **Ship to address** columns have been specified, click **Add address**.

If the order has a bill to address that is different from the ship to address, you can repeat the process or manually type the address on the order row in the addresses section.

Look Up Address X

Enter the bill to and/or ship to addresses automatically from an existing address.

Select an address to add to the transaction:

Select an address ---

Select this option to enter the bill to address.

Bill to address  Yes

Select this option to enter the ship to address. If Will Call is selected, this will not be available.

Ship to address  Yes

Add address Cancel

## Working with products

Products can be added to an order just like they are added to an opportunity or quote. Unlike the opportunities and quotes, there are some additional pricing behaviors that only apply to orders and invoices. Because orders and invoices typically represent the last stage of a sales process, organizations want to ensure that the pricing information related to them is correct. This can be handled by limiting the products and pricing that can be added.

## Working with prices

To ensure that the correct pricing is being used, pricing can be locked and unlocked as needed. Locking pricing is used to ensure that only existing products with the current pricing model are used. When viewing an order, the **Prices Locked** column indicates whether the pricing is currently locked. Prices can be locked by selecting the **Lock Pricing** button.

## Locked pricing

By default, when an order is created from a quote, the pricing will be locked. When pricing is locked, it is not possible to overwrite the pricing information on the order. Quantities can be adjusted but pricing cannot. Both write-in and existing products can be added as line items, but the pricing for existing items cannot be changed. Write-in products can have the price defined when they are added, but the quantities cannot be updated while the pricing is locked.

The screenshot shows the Microsoft Dynamics 365 Order screen for an order titled "Looking to Purchase new Equipment for Office". The "Prices Locked" field is set to "Yes", indicated by a red box and a note that it "Indicates that pricing is locked". In the "PRODUCTS" grid, a specific line item for "Outdoor Mo..." has its quantity changed from 1.00000 to 2.00000, while the price remains at US\$775.00. A red box highlights this change with the text "Line item quantities can be changed, but prices cannot." Another red box in the top right corner states "Unlocks pricing." with an arrow pointing to the "Use Current Pricing" button.

## Unlocked pricing

If you require the ability to have additional flexibility over pricing, you can unlock the pricing on the order. This is done by selecting the **Use Current Pricing** button. This will unlock the pricing and allow you to use the **Get Products** feature to add products. When pricing is unlocked, you can overwrite any pricing columns, as needed.

The screenshot shows the Microsoft Dynamics 365 Order screen for the same order. The "Prices Locked" field is now set to "No". The "PRODUCTS" grid shows the same items as before, but the quantity for the "Outdoor Mo..." item has been changed back to 1.00000. A red box highlights this change with the text "Orders can be completed or partially fulfilled." A red box near the top right indicates that "Creates Invoice from order." and another indicates that "Cancels the Order." An arrow points from the "Fulfill Order" button in the ribbon to the grid.

## Delivering sales orders

Once the order is placed, the next step is fulfillment, which involves providing the services or products that the customer has asked for in the order. Microsoft Dynamics 365 allows users to track whether orders

have been fulfilled. The fulfillment may be marked as complete or partial.

Microsoft Dynamics 365 provides the ability to cancel an existing order. When an order is placed by a customer, it has the status of open. It is not uncommon for a customer to request the cancellation of an order, which can be completed directly from the order row.

Another option is that you can create an invoice from an order.

When you select **Create invoice**, a new invoice will be generated from the order. The new invoice will contain all the products that were defined on the order.

## Invoices

Invoices are requests for payment from a business to its customers.

Invoices can be, but are not required to be, related to orders.

Depending on the payment terms, an invoice can be generated from an order after it is fulfilled or when it is placed.

There are two common ways that invoices can be generated in Dynamics 365:

- Create a new invoice manually.
- Create an invoice from an existing order.

The most common way for an invoice to be generated is to create it directly from an order. When the invoice is created, all the products that were associated with the order will be automatically added to the invoice. Additional products or services can be added or removed from the order after it has been created.

After an invoice has been created, individual line items can be added and edited as needed, just like with orders. Also, just like orders, pricing information can be locked and unlocked as needed.

## Closing invoices

After the invoice is paid by the customer you can mark the invoice as paid. When you mark an invoice as paid, you can select one of two options:

- **Completed** - The invoice was completely paid by the customer.
- **Partial** - The invoice was only partially paid by the customer.

Locks pricing.

Get Products functionality enabled.

Line item quantities and prices can be changed.

Order · Order ▾

Summary Related

Order ID  
ORD-01001-L455G7

Name  
Looking to Purchase new Equipment for Off...

Currency  
USD

Price List  
Default Price List

Prices Locked  
No

PRODUCTS

Group By: (no grouping)

Product Name	Properties	Price Per Unit	Quantity	Discount	Extended Amount
F-95 Securit...	Not Configured	US\$799.95	1.00000	---	US\$800
Outdoor Mo...	Not Configured	US\$775.00	1.00000	---	US\$775
Surge Protec...	Not Configured	---	---	---	US\$150
12 inch Secu...	Not Configured	---	---	---	US\$1,600

SALES INFORMATION

Opportunity

Quote

Potential Customer

DESCRIPTION

US\$3,325  
Total Amount



## Module 4 Manage goals with Dynamics 365 Sales

### Define and track individual goals in Dynamics 365 Sales

#### Goal overview

Goals can be a very important part to any organization, as they can be used for compensation, bonuses, or even advancement within an organization. Dynamics 365 provides the ability to define and work with goals. In this module, you will discover:

- An overview of how goals are used in Dynamics 365.
- An introduction to the key components used in goals.

#### Goal management concepts

Goals can be an important part to any organization. Not only do they provide employees with something tangible, their progress can be easily measured as they are working through to their end goal. In some organizations, goals can be used for compensation or bonuses.

Some examples of goals might include:

- A salesperson might have targets for a certain amount of 'won' opportunities where 'in-progress' and 'won' opportunities are tracked against the target value. For example, if Connie's goal is 25 'won' opportunities this month, Microsoft Dynamics 365 would track all of the open opportunities currently assigned to Connie (in-progress) and all of her opportunities that were closed as 'won' (actual) and apply it to her goal.
- A Customer service rep might have targets for a certain amount of 'resolved' cases where 'in-progress' and 'resolved' cases are tracked against the target value. For example, Mark's goal is to "resolve" 400 cases this month, Microsoft Dynamics 365 would track all the open cases currently assigned to him (in-progress) and all of his cases that were closed as 'resolved' (actual) and apply it to his goal.

- A sales department has an overall goal, which is a parent goal of each sale person's individual goal. Parent goals can be calculated as a "rollup" of its child goals. For example, Connie and Alan are both sale representatives with their own individual goals. If Connie's sales team consists of her, Alan, and Don and their team goal is to sell \$10,000 worth of products within the next month, that is the parent goal of all of their individual goals combined.
- Goal targets for activity row types, such as followed-up phone calls or appointments booked, and then compared against completed activities.

## Goals

Goals are generally much more specific than goal metrics. They are defined for a specific user or team. When a goal is created, it's always based on a specific goal metric, and the specific time period that you want to track the progress for is also defined.

Additionally, goal rows have three numeric values which can be used together to track progress against goals.

- **Target** - Entered manually.
- **Actual** - Calculated and defined by the **Actual Rollup** column specified in the underlying goal metric.
- **In-Progress** - Calculated and defined by the **In-Progress Rollup** column specified in the underlying goal metric.

Out-of-the-box, Microsoft Dynamics 365 for Sales includes three pre-defined goal metric rows to base goals on and to view as examples of how to configure goal metrics. These are:

- **No. of Cases** - Create goals for the number of service management cases resolved in a time period.
- **No. of Product Units** - Create goals for the quantity of opportunity products included in open or won opportunities in a time period.
- **Revenue** - Create sales goals, defined in terms of open and won opportunities for a time period.

## Defining individual goals

A goal in Dynamics 365 is the row that defines the specific details on what specifically is going to be measured. In particular, this is who is responsible (user or team), and what is the specific time that you are tracking this goal for.

Every goal that you create will be based on an underlying goal metric row with a metric type of either 'amount' or 'count'. The selection of the goal metric determines how the actual and in-progress values are calculated. Many goals track both an actual value and an in-progress value against a target.

For example, a sales rep might have a monthly revenue target and track both won and open opportunities against the target. However, goal rows are not required to include both actual and in-progress calculated columns.

Goals differ from goal metrics in that goals will always have a time period with a target value. Goal rows are made up of three numeric values that can be used together to track progress against goals:

- **Target Values** - Are manually entered by the user. This is really what the goal is.
- **Actual Values** - Are calculated and defined by the **Actual Rollup** column specified in the underlying goal metric. In other words, how are you doing relative to the target goal?

- **In-Progress Values** - These are calculated and defined by the **In-Progress Rollup** column specified in the underlying goal metric or the potential rows that could be counted towards your actual target.

Goals are always constructed around a time period using a target value. For example, Janet's goal is to win 50 opportunities this month, which the target value being '50' and the time period being 'one month'.

A **Rollup Column** is a column that contains calculated columns for actual and in-progress values. The criteria specified in the goal and goal metric columns, along with the owners of the underlying rows, determine which rows are included in the calculation of a goal's **Target** and **In-Progress** columns.

## Creating goals

After you have defined the specific goal metrics that you want to track, you can create your actual goal rows for users and teams. Goals can be created from the app settings in the Sales Hub App.

When defining a goal, you will need to provide the following information:

- **Name** - Name that describes the goal.
- **Parent Goal** - If this goal is a child goal of another goal, select that goal as a parent goal.
- **Goal Metric** - Choose how the goal will be tracked by selecting a metric for the goal. (If you select a parent goal for this goal, you can't select a goal metric. It is automatically populated from the parent goal.)
- **Goal Owner** - Select the user or team responsible for meeting the goal.

### New Goal

[General](#) [Time Period](#) [Targets](#) [Child Goals](#) [Actuals](#) [Goal Criteria](#) [Notes](#)

Name	* Quarterly Revenue		
Parent Goal	---	Goal Metric	* <input type="button" value="Revenue"/>
Goal Owner	* <input type="button" value="Derik"/>	Manager	* <input type="button" value="Derik"/>

Each goal will have time period information where you will define whether the goal period is a fiscal period or a custom period.

- If **Goal Period Type** is **Fiscal Period**, select a fiscal period and fiscal year for which the goal is tracked.
- If **Goal Period Type** is **Custom Period**, select a date in the **From** and **To** columns to define a custom period for which the goal is tracked.

## New Goal

General   **Time Period**   Targets   Child Goals   Actuals   Goal Criteria   Notes

Goal Period Type	Fiscal Period
Fiscal Period	* Quarter 4
Fiscal Year	* FY2019
From	10/1/2019
To	12/31/2019

On the **Targets** tab, specify a target value against which the results of the goal rollup are measured. The target type depends on the **Amount Data Type** selected for the goal metric that you chose for this goal.

You will see one of the following required columns:

- **Target (Decimal)** - This column is available if the goal **Metric Type** is **Amount** and the **Amount Data Type** is **Decimal**.
- **Target (Money)** - This column is available if the goal **Metric Type** is **Amount** and the **Amount Data Type** is **Money**.
- **Target (Integer)** - This column is available if the goal **Metric Type** is **Amount** and the **Amount Data Type** is **Integer** or if the goal **Metric Type** is **Count**.

If the goal metric you are using has **Track Stretch Target** selected, you will also see one of the following required columns:

- **Stretched Target (Decimal)** - This column is available if the goal **Metric Type** is **Amount** and the **Amount Data Type** is **Decimal**.
- **Stretched Target (Money)** - This column is available if the goal **Metric Type** is **Amount** and the **Amount Data Type** is **Money**.
- **Stretched Target (Integer)** - This column is available if the goal **Metric Type** is **Amount** and the **Amount Data Type** is **Integer** or if the goal **Metric Type** is **Count**.

## New Goal

General   Time Period   **Targets**   Child Goals   Actuals   Goal Criteria   Notes

Target (Money)	US\$250,000
----------------	-------------

The **Actuals** tab shows the actual value achieved toward the target as of the last rolled-up date:

- **Actual (Money)** - If the goal metric uses **Money** as the **Amount Data Type**, this column shows the total amount of money achieved towards the goal as of the last rolled-up date.
- **In-progress (Money)** - If the goal metric uses **Money** as the **Amount Data Type**, this column shows the amount of money achieved toward the goal since the last time the actuals were calculated.
- **Percentage Achieved** - If the goal metric is **Decimal** or **Integer**, this column shows the percentage of the goal that is complete as of the last rolled-up date.

- **Last Rolled Up Date** - This column shows the last date and time that the actuals were recalculated.

**Quarterly Revenue**  
Goal

General	Time Period	Targets	Child Goals	Actuals	Goal Criteria	Notes	Participating Records	Related
<input type="button" value="Actual (Money)"/>				US\$894,329		<input type="button" value="Percentage Achieved"/>	358	
<input type="button" value="In-progress (Money)"/>				US\$462,500		<input type="button" value="Custom Rollup Field (Money)"/>	US\$0	
<input type="button" value="Last Rolled Up Date"/> 12/17/2019 <input type="button" value="Calendar"/> 2:36 PM								

On the **Goal Criteria** tab, define the criteria that will be used for rolling up the actuals data against the goal.

- **Roll Up Only From Child Goals** - If you want to limit the data used for the roll up to only child goals, select **Yes**. To allow other data to be used for the roll ups, select **No**.
- **Row Set for Rollup** - If you want to limit the rows that can be included in the roll up to only those rows owned by the goal owner, select **Owned by goal owner**. To allow all rows to be included in the roll up data, select **All**.

**Quarterly Revenue**  
Goal

General	Time Period	Targets	Child Goals	Actuals	Goal Criteria	Notes	Participating Records	Related
Define criteria for this goal. The criteria will be used for rolling up the Actuals data against the goal.								
<input type="checkbox"/> Roll Up Only from Child Goals * <b>No</b> <input type="checkbox"/> Record Set for Rollup * <b>Owned by goal owner</b>								
<input type="button" value="Rollup Query - Actual(Money)"/>				<input type="button" value="Rollup Query - In-progress(Money)"/>				

## Parent child goals

Microsoft Dynamics 365 allows us to have parent goals and child goals.

Essentially, parent goals can have one or more child goals below it. The result of all the child goals can roll up to the primary target parent goal. This allows for each component of the goal's structure to be evaluated individually and as an entire team. During the goal rollup, the child goal totals are rolled into the parent goal totals and create a cumulative sum of all goal totals.

Here's an example:

- Linda is a sales manager for a specific region.
- She manages three people: Suzanne, David, and Ryan.
- Each salesperson has their own revenue-based goal of \$500,000.00.

- Linda's goal as a manager is \$1,500,000.00
- As Suzanne, David, and Ryan sell throughout a period, their results should be included in Linda's goal.



By using parent and child goals, you can monitor Linda's overall progress on her sales goal as a manager. Her goal can be configured to include each of her team members individual goals.

## Defining child goals

Child goals can be defined in two ways. The first way is by setting the **Parent Goal** column on the goal that should be a child goal. The other way is to define the child goals directly from the parent goal. This is done from the **Child Goals** tab on the goal that will be the parent. You can create new child goals directly from the tab, or you can add existing goals.

Name	Goal Owner	Target	Percentage Achiev...	Actual	In-Progress	Status Reason
Alex Revenue	○ Alex Allman	US\$250,000	36	US\$90,000	US\$60,000	Open
Lilly Revenue	○ Lilly Michael	---	---	US\$0	US\$0	Open

On the **Goal criteria tab**, you can also specify if the progress should only be based on the progress of the child goals or if individual progress should also be included. For example, a manager can also sell items. If any sales that the manager makes shouldn't count toward their managerial goal, you set the

roll-up only from **Child Goals** column to **Yes**. If their sales should count, the column can be set to **No**. By default, the column is set to **No**.

Some other key points about parent goals are:

- A goal can have multiple child goals AND be a child goal of another goal (grandchild).
- If you delete a parent goal, the child goals are NOT deleted, only the reference to the parent goal is removed.
- All goals in the goal hierarchy must be based on the same fiscal period or custom period. If you specify a different time period for a child goal, a time period for a parent goal will be used.

# Use goal metrics in Dynamics 365 Sales

## Goal metrics overview

The Dynamics 365 goal management capabilities includes the following components:

- **Goal metric** - A numeric measure based on the value of a column contained in a specific row type. Several goal metrics are pre-configured and you can also create your own. One pre-configured goal metric – “Revenue” – is useful for sales management and will be used below.
- **Goal target** - A specific value of a goal metric entered for a specific time period.
- **Goal owner** - Defines who the goal is for. In Dynamics 365 goals can be assigned to users or teams.
- **Rollup queries** - Determine how actual and in-progress amounts are rolled up against the goal.
- During the time period defined for a goal, *actual* and *in-progress* values are periodically calculated. These calculated values are used to compare the target value of the goal with what has already been achieved and what is remaining to be achieved for the time period.

Additionally, goals can have parent goals, which combine multiple goals to equal one large goal. For example, a sales manager might have a parent goal that combines all the goals of all the salespeople that they manage.

There are two key concepts to understand when working with Goals in Dynamics 365. What is the specific metric that you are trying to track and who are you tracking this for. You can achieve this by defining a goal metric and creating actual goals for users.

## Goal metrics

A goal metric is the foundational element of goals in Dynamics 365. Every goal that is created in the system will be based on a specific goal metric. Goal metrics are not specific to a user but define what specifically you want to measure.

Goal metrics include:

- Underlying row types
- Metric type, either an amount or count
- Contributing columns
- How status values map to actual and in-progress goals

## Fiscal year settings

Fiscal periods are important for goal management because all goals are date bound. This means that you need to define dates for goals. Fiscal year options affect the way in which your organization's data is stored in Dynamics 365.

Here are some general rules to know about fiscal year periods and fiscal year goals:

- For each goal, you must specify a fiscal period or customer time period.
- If you select a fiscal period, you must specify a fiscal year.
- Fiscal periods have a wide range of dates to choose from, such as monthly, quarterly, semester, annually.

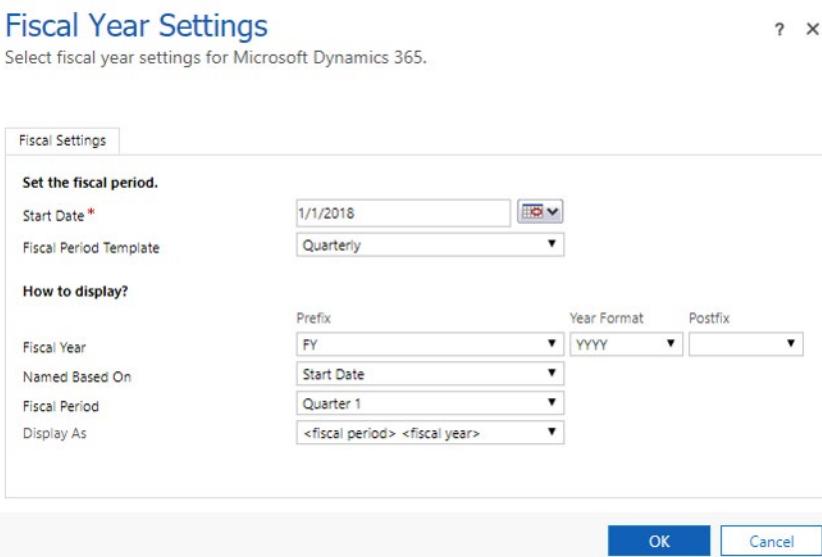
- The goal's fiscal year and fiscal period are tied to the organization's fiscal year settings and can be redefined any time.

By default, Microsoft Dynamics 365 defines a fiscal period based on a calendar year. Many organizations may not align the fiscal year with the calendar year. They may run their fiscal year from July to June. However an organization manages their fiscal year, it is important to ensure that the system is configured correctly for each organization's fiscal year.

## Defining fiscal year settings

Fiscal year settings can be accessed in Dynamics 365 by navigating to Settings > Business Management > Fiscal Year settings. When configuring settings, you can do two things:

- Define the fiscal period** - Specify the date that an organization fiscal year begins, and the period template that should be used. You can choose from five period options:
  - Annually
  - Semi-annually
  - Quarterly
  - Monthly
  - 4-week period
- Configure how the data is displayed** - Specify the display settings for different fiscal year elements that are presented. This includes:
  - Fiscal year display format** - You can set the prefix, year format, and post fix.
  - Named based on** - Defines if the fiscal is based on the start or end date of the fiscal year.
  - Fiscal period** - Defines how the periods are displayed, for example Quarter 1 or Q1.
  - Display as** - Defines how the periods and years should be displayed when presented together.



## Goal metrics

Goal metrics are the numeric measurement of specific row type and help define how and what is being measured. Every goal row is based on a goal metric row, with a metric type of either 'amount' or 'count'. The selection of the goal metric determines how the actual and in-progress are calculated.

There are a number of out-of-the-box goal metric rows available to use.

Goal metrics are used to specify the following basic information:

- The type of data in which the goal is defined. For example, a sales goal metric will often be defined as a 'money' data type or a service goal metric will often be a 'count' of total items they are working on.
- The rollup columns to use. These columns are the row type and column for which goal targets will be entered and actual and in-progress values tracked. For example, a typical goal metric for sales can be defined for the Opportunity row type, and define actual sales as opportunity rows with a status of 'Won'. A typical goal metric for service can be defined for the Case row type, and define actual resolved cases as case rows with a status of 'Resolved'.

## Defining a goal metric

The first things that you want to define when preparing to create a goal metric is how you are measuring the information. For example, you could define:

- Are you measuring a dollar amount?
- Is it based on how much you've actually sold?
  - Is it a dollar amount?
  - Are you counting the number of products or services that you have sold?

These definitions need to be established first, because they will determine the additional items defined on the goal metric. When you are ready to create a goal metric, you can do this from the app setting in the Sales Hub app.

Each goal metric will need to have the following defined:

- **Name** - Specifies the name of the metric that will be used with attached to goal rows.
- **Metric type** - Defines the type of metric that will be tracked. Metrics can be set as either a Count or Amount. When a metric is defined as an amount metric, a data type for the amount will need to be defined. You can select between **money**, **decimal**, or **integer**.

The second item that needs to be defined for a goal metric is the row type it will be associated with and the actual column for which goal targets will be tracked against using the actual and in-progress values. For example, you want to create a goal that is related to sales opportunities, so you need to define:

- Which opportunities should be tracked?
- Do you track dollar amounts? If Yes, which column?
- Are you going to track the estimated dollar amount or do you track the actual dollar amount column?
- Do you track the close by date or do you track the estimated close date or the actual close date?
- Do you track opportunities with the status of open versus a status of won?

All of these columns are referred to as rollup columns. Defining a rollup column consists of three steps:

1. Define the rollup column to track against goals,

- 
2. Define the source data that will be rolled up,
  3. Define the date column used to determine the goal period that the rows will be rolled up to.

## Define the rollup column to track against

Every goal row is based on an underlying goal metric row. The selection of the goal metric determines how the actual and in-progress goals are calculated. Many goals track both an actual value and an in-progress value against a target. For example, a sales rep might have a monthly revenue target and track both won and open opportunities against the target. However, goal rows are not required to include both actual and in-progress calculated columns.

Here are some examples of metrics that might be defined:

- **Number of prospects and proposals** - Over the course of a quarter, month, week, or year, you have certain goals for the number of prospects and proposals that are sent or closed by your sales team.
- **Number of new and retained customers** - Assuming there is built-in a metric to analyze how long a customer has been with you, or if they're considered to be a retained, or a new customer, you could track this with a goal functionality.

A rollup column can be set to one of the following:

- Actual
- In-progress
- Custom

Each can only be used once per metric. For example, once **in progress** is added, it cannot be added again.

## Define the source data that will be rolled up

The next thing that needs to be defined for the rollup column is the details that will define which rows are considered. There are four items that can be configured:

- **Source row type** - Defines the table that the rollup column is going to be associated with. (This is required.)
- **Source column** - Defines the column that contains the data that will be rolled up. (This is required.)
- **Source row type state** - Defines the state of the row that will be included such as open or closed.
- **Source row type status** - Defines the status of the row that will be included such canceled or completed.

The combination of all the defined details is what determines the rows that will be included.

An actual rollup column that is based on a money metric might resemble the following image.

Step 2: Specify the details about the source data that rolls up

<input type="checkbox"/> Source Record Type	* Opportunity	Source Field	* Actual Revenue
Source Record Type State	Won	Source Record Type Status	--Select--

In this example, the rollup column will include the data from the **Actual Revenue** column for any opportunity that has been won.

In the following, only data from the **Est. Revenue** column, for any opportunity that is currently open, is going to be included.

Step 2: Specify the details about the source data that rolls up

<input type="checkbox"/> Source Record Type	* Opportunity	Source Field	* Est. Revenue
Source Record Type State	Open	Source Record Type Status	--Select--

## Specify the date column that defines the period the rows will roll up into

The most important question that needs to be asked when defining rollup columns is: What date columns should we be looking at? Remember, all goal rows are date bound. This mean when you are trying to define what you're measuring, you also to need identify what date columns you want to evaluate.

To specify a date column, you will need to specify the row type and a date column for that row type.

The image following shows what a completed **Actual rollup** column might look like.

General	<u>Rollup Fields</u>	Description	Related																		
Step2 : Define the rollup fields for this metric to track the target's actual and in-progress values																					
Rollup Attributes																					
<table border="1"> <thead> <tr> <th>✓ Rollup Field</th> <th>Source Record Type</th> <th>Source Field</th> <th>Source Record Type State</th> <th>Source Record Type Status</th> <th>Date Field</th> </tr> </thead> <tbody> <tr> <td>Actual (Money)</td> <td>Opportunity</td> <td>Actual Revenue</td> <td>Won</td> <td>---</td> <td>Actual Close Date</td> </tr> <tr> <td>In-progress (Money)</td> <td>Opportunity</td> <td>Est. Revenue</td> <td>Open</td> <td>---</td> <td>Est. Close Date</td> </tr> </tbody> </table>				✓ Rollup Field	Source Record Type	Source Field	Source Record Type State	Source Record Type Status	Date Field	Actual (Money)	Opportunity	Actual Revenue	Won	---	Actual Close Date	In-progress (Money)	Opportunity	Est. Revenue	Open	---	Est. Close Date
✓ Rollup Field	Source Record Type	Source Field	Source Record Type State	Source Record Type Status	Date Field																
Actual (Money)	Opportunity	Actual Revenue	Won	---	Actual Close Date																
In-progress (Money)	Opportunity	Est. Revenue	Open	---	Est. Close Date																
<input type="button" value="New Rollup Field"/> <input type="button" value="Refresh"/> <input type="button" value="Run Report"/> <input type="button" value="Excel Templates"/> ...																					

## Module 5 Analyze Dynamics 365 Sales data

### Analyze data in Dynamics 365 Sales

#### Analytical options overview

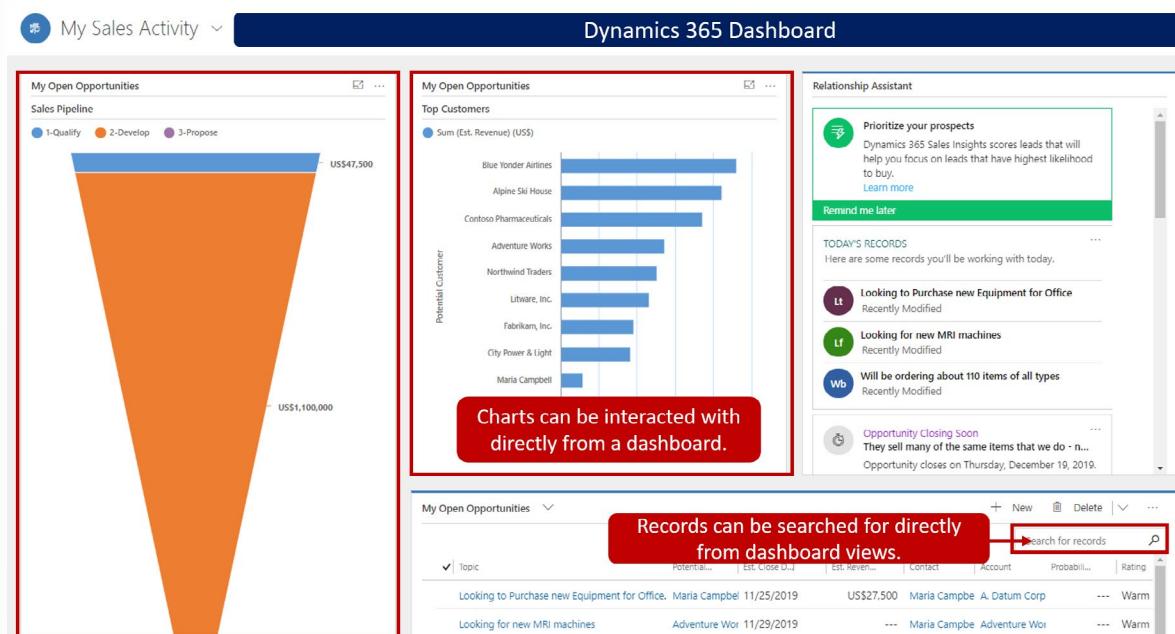
Analytics represent a key element in many organizations, but they can be especially important in sales-related organizations. Organizations can gain a better understanding of themselves by diving deeper into information like opportunities that have been won and lost, average time to close, the most effective lead sources, and other demographic data. They can use this information to build long-term strategies that will help them grow their business, based on factors like strengths and weaknesses. By its nature, Microsoft Dynamics 365 lends itself very well to analytics.

By diving deeper into information about leads, opportunities, quotations, and so on, organizations can answer questions like:

- What areas are we strong in?
- What areas are we weak in?
- What do our numbers look like geographically?
- How do we compare with our competitors?
- What does our win rate look like by region, demographic, product, and so on?

Out of the box, Microsoft Dynamics 365 Sales provides several tools that can help answer many of these questions. Here are some of the most common tools that are available:

- **Lists and views:** Lists and views provide one of the easiest ways to do basic analysis of data. They include multiple options for filtering and sorting data. Out of the box, each row type has several predefined views. More views can be added, based on individual needs.
- **Charts:** Charts provide a visual representation of information in real time, based on the lists and views that are associated with specific row types, like leads and opportunities. Out of the box, Dynamics 365 includes several interactive charts.
- **Dashboards:** Dashboards are used to consolidate data from multiple row types into a single interactive area. Dashboards can include charts, lists, and data from custom HTML pages, external websites, and other resources. Out of the box, Dynamics 365 includes multiple dashboards.



- **Advanced Find feature:** Advanced Find lets users run complex and comprehensive searches for all types of information. For example, users can search for information from different types of rows and view the combined data. Searches and results can be saved as personal views for later use.
- **Reports:** Reports provide an organized way to show specific information. Out of the box, Dynamics 365 includes several pre-configured sales reports that can be used to track important aspects of sales management. Custom reports can also be created by using the Dynamics 365 report wizard.
- **Microsoft Excel:** Users can export data from Dynamics 365 to Excel to take advantage of the analysis tools that Excel offers, like more detailed charting capabilities and PivotTables. Dynamics 365 data can be exported to Excel as a static worksheet, a dynamic worksheet, or a dynamic PivotTable. Organizations that use Microsoft Excel Online can open Dynamics 365 views in Excel Online and edit them directly in the Dynamics 365 user interface.

As we've just seen, Dynamics 365 offers many out-of-box reporting and analysis options. In addition, business intelligence (BI) applications can use Dynamics 365 as a data source for more detailed analytics. One of the most common BI applications that can interact with Dynamics 365 is Microsoft Power BI. Power BI is part of Microsoft Power Platform.

Many organizations use Power BI to do more complex BI reporting. Power BI can pull data from multiple data sources to support more advanced analytical needs. Dynamics 365 can be one of those data sources. Power BI automatically updates the data that's shown in Dynamics 365. By using Power BI Desktop or Microsoft Power Query for Excel to write reports, and by using Power BI to share dashboards and update data from Dynamics 365, sales, marketing, and service personnel in your organization have a powerful new way to work with Dynamics 365 data.

## Searching tools

The first step in effective reporting and data analysis is often finding data. If the correct data isn't shown, charts and reports don't really provide any value. Out of the box, Microsoft Dynamics 365 includes multiple views that can be used for quick filtering and analysis of data. Organizations can use these views to easily get a big picture overview of what's going on.

Let's look at a couple of examples:

- A sales manager uses the **Leads Opened this Week** view to see all the new leads that were generated during the current week. From the view, the sales manager can filter the leads by criteria like territory. The sales manager can assign the leads in specific territories to sales staff who are associated with those territories.
- An account executive exports the rows that are shown in the **My Closed Opportunities in Current Fiscal Year** view to Microsoft Excel and creates a PivotTable to dive deeper into the numbers.

Although there are many different out-of-box views that show data in many ways, organizations might have to find specific data that isn't shown in any out-of-box view. One way to find and present that data is to use the Advanced Find feature in Dynamics 365.

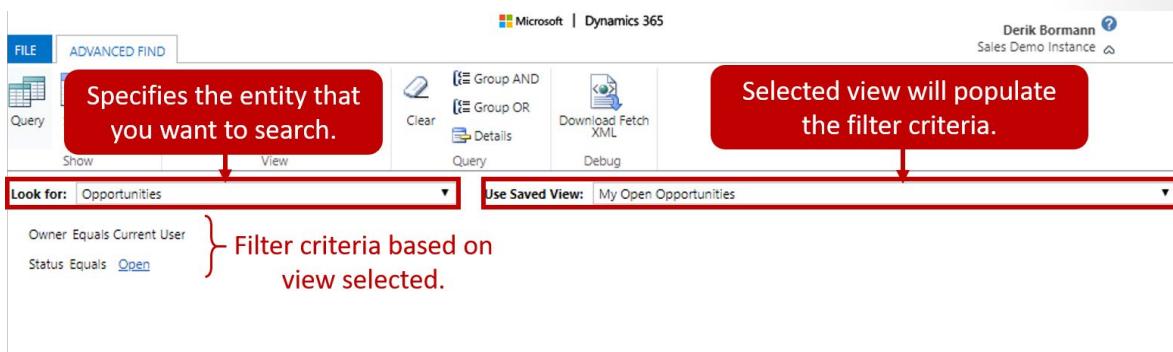
## Advanced find

Advanced Find is an excellent way to extract data from Microsoft Dynamics 365 Sales. It uses user-defined filters to show the desired data. For example, a sales representative wants to see all her accounts that have ordered a specific product during the past six months. By using Advanced Find, the sales representative can filter on data that's included not only in account rows but also in related rows, like the line items on orders that an account has placed. Advanced Find can also help prepare data for export to Excel for reporting purposes. To access this feature, select the **Advanced Find** button on the navigation bar. In the **Advanced Find** window, two columns are used to initially filter rows:

- **Look for:** Specify the table to search against, like accounts, leads, or opportunities.
- **Use Saved View:** Specify the table view that should provide the initial filter criteria, like **My Open Opportunities**.

When Advanced Find is first loaded, it uses the filter that's provided by the view that's currently shown. For example, if you're looking at the **My Open Opportunities** view when you select the **Advanced Find** button, the **Look for** column will be set to *Opportunities*, and the **Use Saved View** column will be set to *My Open Opportunities*. Additionally, the view will be filtered so that it shows only open opportunities that are owned by you, the current user.

The following image shows what Advanced Find looks like for this example.



You can change the filter criteria by selecting the **Details** button. You can add, edit, or delete individual filter criteria as you require.

Advanced Find can return only a single row type in the list of results. It can't return, for example, both accounts and opportunities in one list. But it can use data in other tables to control which rows are shown for a specific row type. For example, the filter criteria in the following image return account rows that have open opportunities that have an estimated revenue of more than \$100,000.00.

The screenshot shows the Microsoft Dynamics 365 Advanced Find interface. In the top left, there's a red callout pointing to the 'Results' button in the ribbon bar, which is labeled 'Runs the query and populates the results.' In the top right, another red callout points to the 'Details' button in the ribbon bar, which is labeled 'Makes the filter criteria editable.' Below the ribbon, a search bar says 'Look for: Accounts'. Underneath, there are two sections of filter criteria. The first section, 'Select', has a red box around it and is labeled 'Filters defines that account must have at least one open opportunity with an est. revenue of >= \$100,000.' It includes filters for 'Opportunities (Potential Customer)' with 'Status Equals Open' and 'Est. Revenue Is Greater Than or Equal To 100,000.00'. The second section, 'Advanced Find', contains filters for 'Status Equals Active'.

After you've finished defining the filter criteria, you can show the results by selecting the **Results** button. If you want to save the Advanced Find filter so that it can be used as a view at any time, select the **Save As** button, and enter a name for the view. After a filter is saved as a view, the view will be available on the **Views** menu for the table that it's based on.

The screenshot shows a Dynamics 365 list view for accounts. At the top, a red box highlights a dropdown menu item 'Active Accounts: Opportunities above \$100,000' with a red arrow pointing to it from the text 'View is now available under personal views through drop-down menu.' Below the dropdown, there's a table with columns 'Account Name', 'Main Phone', and 'Address 1: City'. Two rows are visible: 'A. Datum Corporation (sample)' and 'Contoso Pharmaceuticals (sample)'. The 'Main Phone' column shows '555-0158' and '555-0156' respectively, and the 'Address 1: City' column shows 'Redmond' for both.

## Excel integration

Many users are familiar and comfortable with the data analysis tools that are available in Excel. Therefore, many users prefer to export Dynamics 365 data to Excel and do data analysis from there.

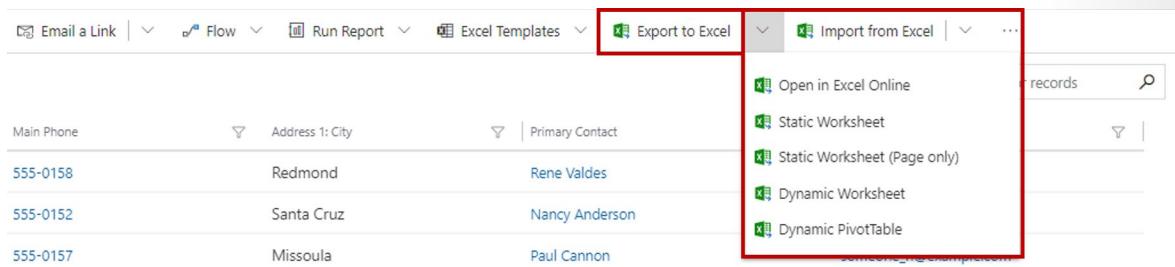
Dynamics 365 provides several options that let users manage and analyze Dynamics 365 data by using the tools in Excel that they're familiar with.

- Static Excel data exports:
  - Users can export a snapshot of a selected view.
  - Users can export all the rows that are shown in a view.
- Dynamic workbooks:
  - The export creates workbooks that have a connection to the Dynamics 365 Sales database.
  - The workbooks are dynamically updated from within Excel.
- Dynamic PivotTables:
  - These PivotTables resemble dynamic workbooks, but users must design the PivotTable columns and rows that they want to interact with.
- Microsoft Excel Online:
  - You can edit Dynamics 365 data by using Excel inside Dynamics 365.
  - Data can be saved back to Dynamics 365.

## Working with inline Excel

Sometimes, you might want to do bulk edits or do quick analysis of Dynamics 365 data by using the tools that are available in Excel, but you don't need to do a full export of the data. Dynamics 365 lets you do quick ad-hoc analysis by using Excel Online inside Dynamics 365. For example, if you're a sales manager, you might want to analyze the opportunities that your team owns and review key performance indicators (KPIs) to see how you can help your team members. If you're a sales representative, you can open your opportunities in Excel and do what-if analysis for different incentive scenarios. Finally, you might want to quickly open the data in Excel Online so that you can copy it somewhere else, like into an email.

Any view that's currently shown in Dynamics 365 can be opened in Excel Online. Just select the **Export to Excel** button on the command bar, and then select **Open in Excel Online** on the menu that appears.

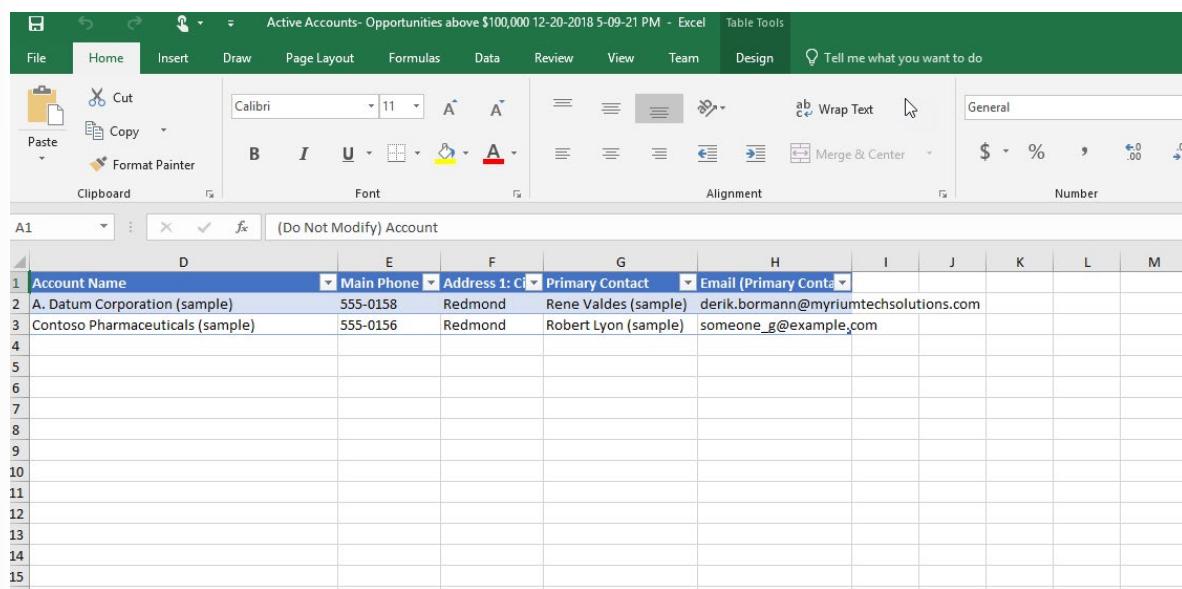


After you've finished editing your data in Excel Online, you can save the updated information back to Dynamics 365 by selecting the **Save** button. Remember to keep the existing format of the Excel cells, to prevent issues during import. Any additional information that you add to the workbook, like charts or colors, won't be saved.

Changes will be imported back → **Save**   **Return**

## Exporting Dynamics 365 information to Excel

If you need to take advantage of the more advanced analysis tools that are available in Excel, you can export Dynamics 365 data as either static workbooks or dynamic workbooks. You can import both types of workbook back into Dynamics 365. If you need more advanced functions, you can export a dynamic PivotTables make it very easy to organize and summarize data.



The screenshot shows a Microsoft Excel spreadsheet titled "Active Accounts- Opportunities above \$100,000 12-20-2018 5-09-21 PM - Excel". The ribbon at the top includes tabs for File, Home, Insert, Page Layout, Formulas, Data, Review, View, Team, Design, and Tell me what you want to do. The Home tab is selected. The table has columns labeled D through M, with headers: Account Name, Main Phone, Address 1: City, Primary Contact, and Email (Primary Contact). The data rows show two entries: "A. Datum Corporation (sample)" and "Contoso Pharmaceuticals (sample)". The "Address 1: City" column contains "Redmond" for both entries. The "Primary Contact" column contains "Rene Valdes (sample)" and "Robert Lyon (sample)" respectively. The "Email (Primary Contact)" column contains "derik.bormann@myriumtechsolutions.com" and "someone\_g@example.com". The "Main Phone" column contains "555-0158" and "555-0156". The "Account Name" column contains the full company names.

	D	E	F	G	H	I	J	K	L	M
1	Account Name	Main Phone	Address 1: City	Primary Contact	Email (Primary Contact)					
2	A. Datum Corporation (sample)	555-0158	Redmond	Rene Valdes (sample)	derik.bormann@myriumtechsolutions.com					
3	Contoso Pharmaceuticals (sample)	555-0156	Redmond	Robert Lyon (sample)	someone_g@example.com					
4										
5										
6										
7										
8										
9										
10										
11										
12										
13										
14										
15										

The Dynamics 365 data is exported to a standard Excel file that you can then use on any device, like your phone, tablet, or desktop computer. It's exported in the same format that you see in Dynamics 365. Therefore, text remains text, numbers remain numbers, and dates remain dates. But some cell formatting might change.

## Out of the box tools

Tools like the out-of-box reports, Microsoft Excel PivotTables, and workbooks do a great job of aggregating and providing a perspective on data. But most users don't need that level of data analysis. They're just looking for a way to quickly navigate and see the high-level data that's important to them. For example, they might want to see their top open opportunities, the current day's activities, or their sales pipeline. Microsoft Dynamics 365 has two commonly used features that meet the needs of these users:

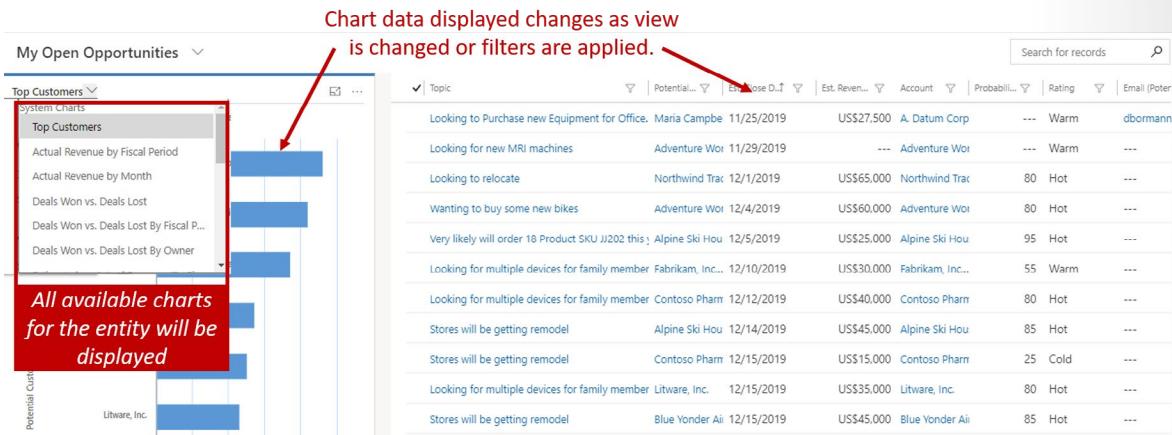
- **Charts:** Charts provide visual insights into an organization's or user's most important data and information. Each table has several predefined charts that can be used to quickly consume big picture data.
- **Dashboards:** Dashboards let users see, at a glance, the most important information that they need to make business decisions. Dashboards can consist of charts, lists, and other resources, like external webpages. Dynamics 365 includes several preconfigured dashboards that help shed light on the most important information. These preconfigured dashboards can be changed, and custom dashboards can be created.

Besides being easy to use, charts and dashboards show data in real time. As leads are created, opportunities are opened and closed, orders are updated, and so on, the charts and dashboards immediately reflect the changes. Additionally, users see only the rows that they have permission to view in the context of the user who is accessing them.

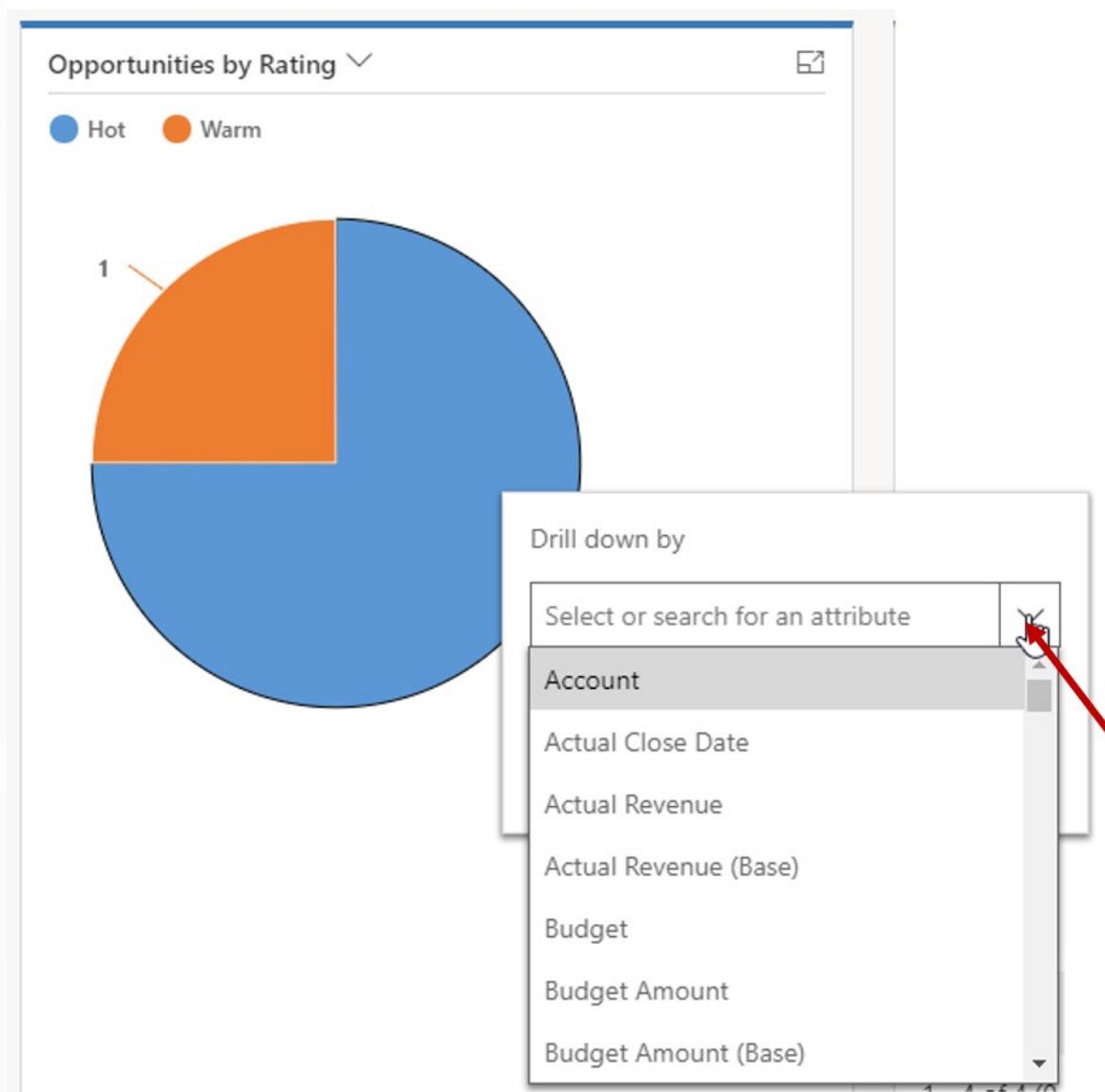
## Working with charts

Most out-of-box tables, like accounts, leads, and opportunities, have multiple charts predefined for them. You can open those charts from any view that's associated with the tables. Just select the **Show Chart** button on the command bar. After the chart pane appears, you can switch to any chart that's defined for the table by selecting the down arrow next to the chart name.

As you filter the data in the view or change the view that you're using, the chart in the chart pane is updated so that it reflects only the data that's currently shown. For example, if you filter a view so that it shows only hot opportunities, only hot opportunities are included in the chart that's shown.



If you want to look at only a specific set of data, like the data that's presented in a bar chart, you can drill down to view more detail. To drill down into the data, select a chart element. You can then make data selections. As you drill down through the chart, you're asked specific questions about the data that you're drilling into.

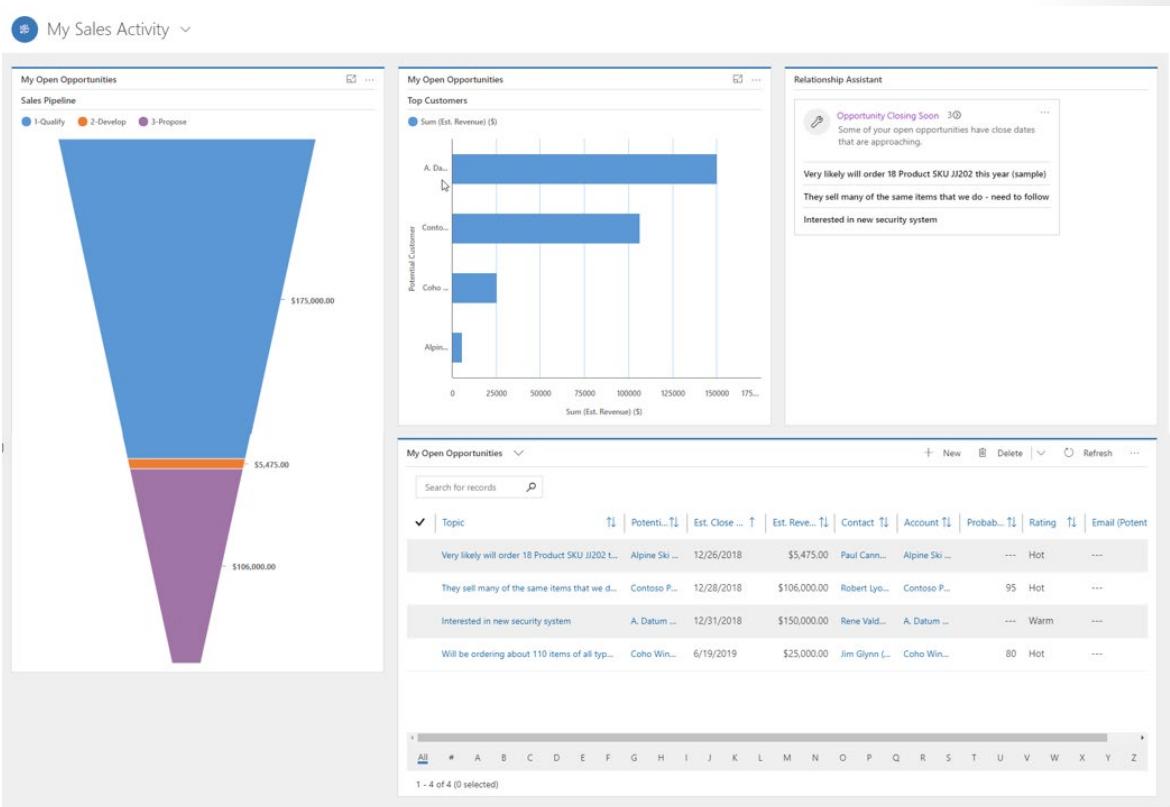


After you've finished working with charts, you can close the chart pane by selecting the **Hide Chart** button on the command bar.

## Working with dashboards

Dashboards are a collection of views, charts, iFrames, web resources, and other graphical reports that provide a high-level overview of data from one location. Therefore, you can analyze different sales data at the same time. Essentially, a dashboard is a snapshot of the data in different formats on one page. Not only is the data shown in a central location, but it can be interacted with directly from the dashboard itself. For example, sales staff can view their sales pipeline chart and see how many opportunities have been closed. At the same time, the Relationship Assistant can prompt them to take action on opportunities, appointments, and tasks that are related to their customers.

The following image shows an example of a dashboard.



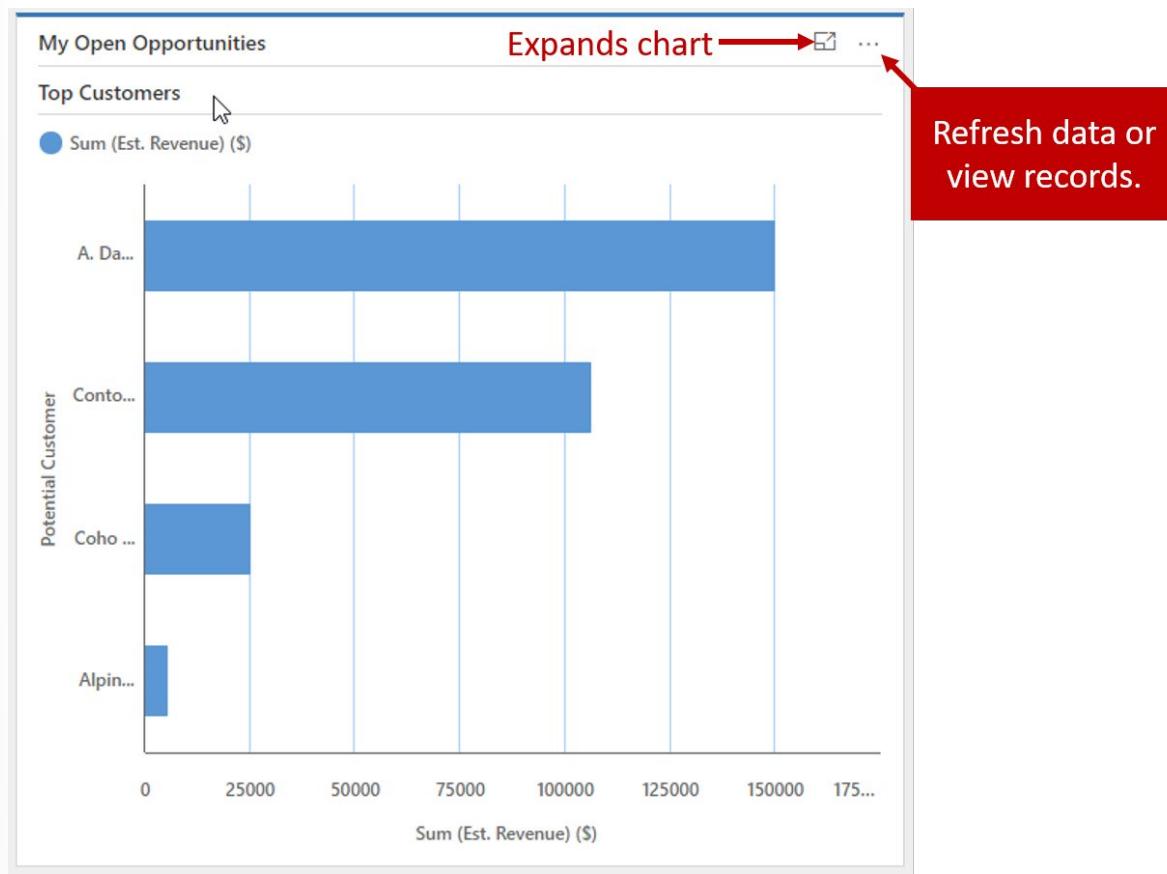
Each item that's presented on a dashboard is called a *component*. Each dashboard can include a maximum of six components, unless you're using interactive dashboards, or unless you've increased the default limit through advanced customizations by using Microsoft Windows PowerShell.

Dashboards aren't automatically refreshed, but they show the most current data every time you load the page. If you leave a dashboard to make changes to a row, the dashboard will reflect those changes the next time it's loaded.

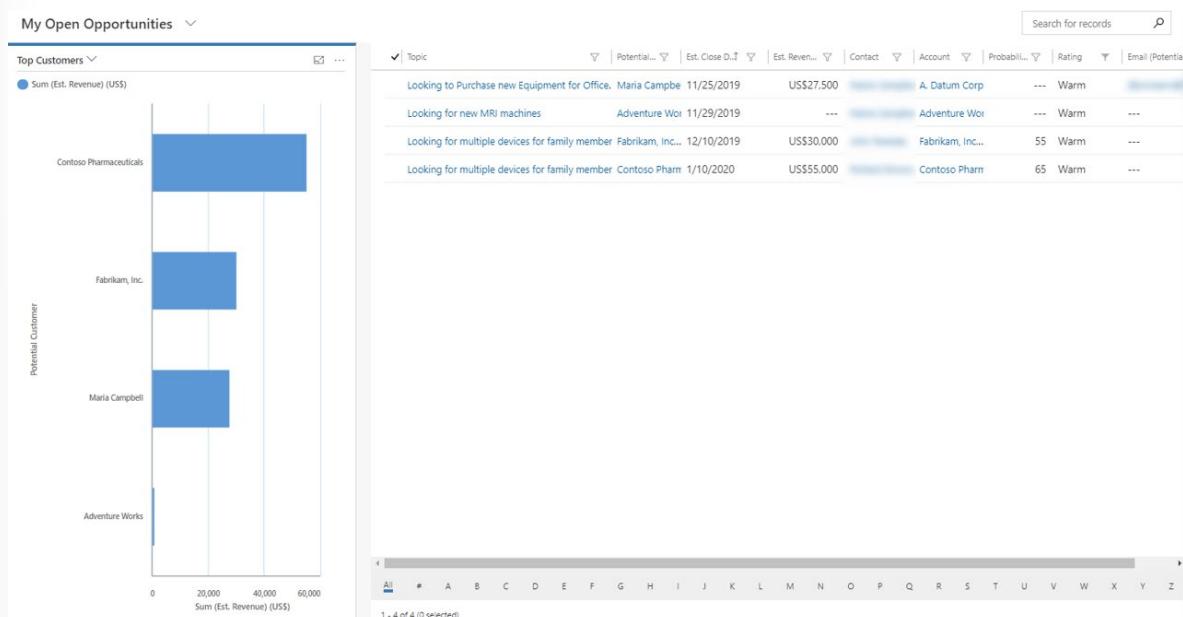
Microsoft Dynamics 365 Sales includes several out-of-box dashboards that let users measure their productivity and see how they compare to the other users in their organization. These out-of-box dashboards are called *system dashboards*, and they all users of an organization can view them. Here's a list of the system dashboards:

- Sales Dashboard
- Sales Activity Dashboard
- Sales Activity Social Dashboard

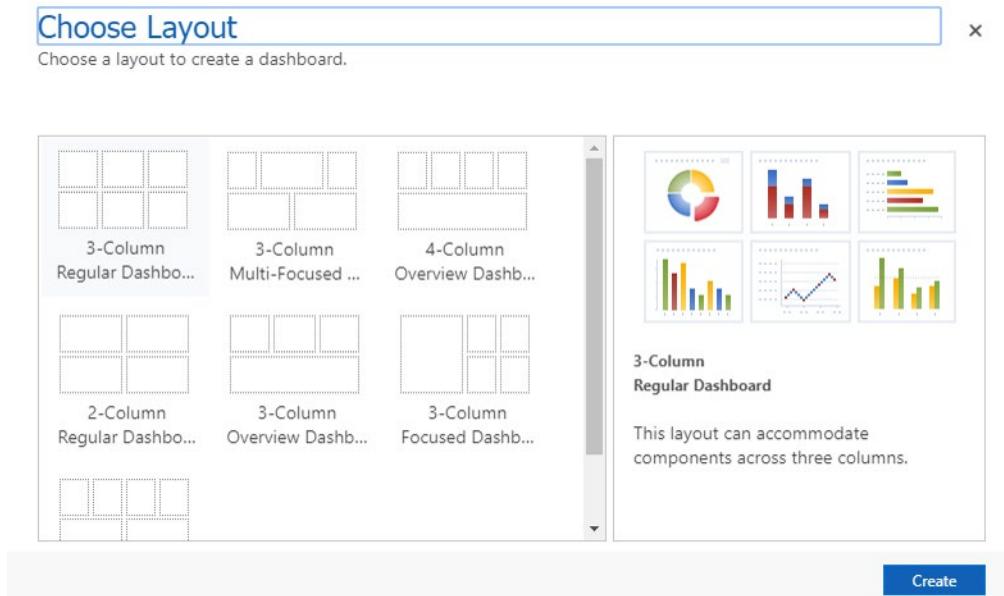
You can expand components or drill down into the rows that are used to generate the charts by selecting the appropriate button.



If you select the **View the rows that are used to generate the chart** button, a window is opened that shows the chart and a list of the rows that it's associated with. You can select one of the chart elements to view just the rows that are associated with that area. After you've finished reviewing the data, you can close the window to return to the original dashboard.



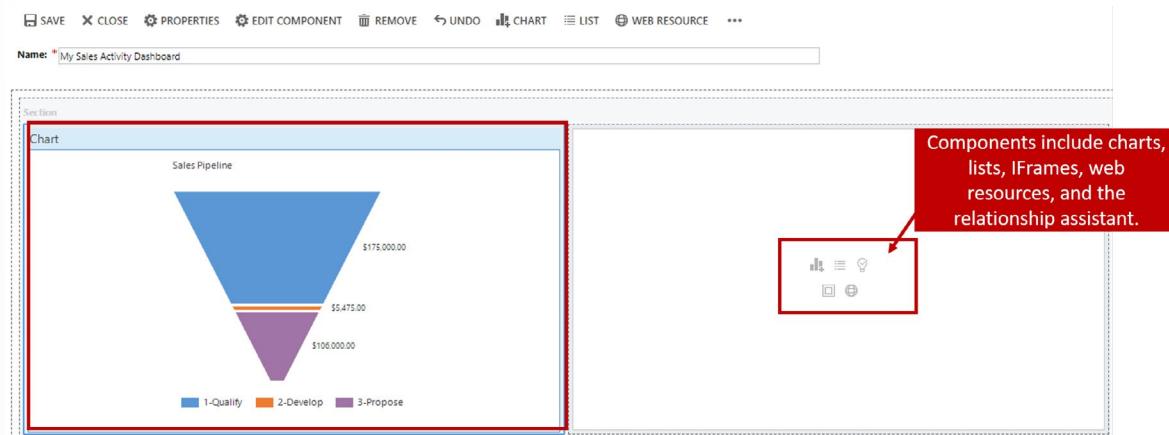
If you want dashboards that have specific items that are relevant to you, you can create additional dashboards. Dashboards that are created by individual users are referred to as *personal dashboards*. By default, personal dashboards are visible only to the users who created them, but they can be shared with other users as needed. To create a personal dashboard, select the **Dynamics 365 Dashboard** button on the command bar. The first step is to select a layout for the dashboard.



In the dashboard designer, you can add components based on your specific needs. Each component placeholder includes a set of buttons that correspond to the different types of components that can be set up. As you add components to the dashboard, you can size, move, or delete them as needed.

Here are some of the types of components that can be added to a dashboard:

- **Chart:** This component shows a Dynamics 365 chart. If you add a chart to a dashboard, you must define the following properties:
  - The table to use
  - The view that defines the data that's shown in the chart
  - The specific chart to show
- **List:** This component shows a specific Dynamics 365 view. If you add a list to a dashboard, you must define the following properties:
  - The table to use
  - The specific view to show
- **IFrame:** This component shows information for a webpage.
- **Web resource:** This component shows information for a web resource that has been added.
- **Relationship Assistant:** This component shows the Relationship Assistant.



After the dashboard looks the way you want, you can save and close it. The next time you select the **Dashboards** option in the site map, the dashboard that you created will be available in the list of dashboards. Personal dashboards always appear at the bottom of the list, under **My dashboards**.

# Analyze data with Power BI

## Power BI overview

Microsoft Power BI is a suite of business analytics tools that deliver insights throughout your organization. Power BI helps connect to hundreds of data sources, simplifies data preparation, and drives ad-hoc analysis. By using the tools that Power BI provides, you can produce beautiful reports and then publish them so that your organization can consume them on the web and across mobile devices.

Everyone can create personalized dashboards that give them a unique, 360-degree view of their business, that scale across the enterprise, and that have governance and security built-in. These features and tools are all available through PowerBI.com. Not only can custom dashboards be created, but there are preconfigured Power BI dashboards that have been created specifically for Microsoft Dynamics 365 Sales and Microsoft Dynamics 365 for Customer Service.

There are several benefits to using Power BI to help analyze of Microsoft Dynamics 365 data. Because it's a complete enterprise analytics application, it has its own ecosystem. Content packs that are available for Power BI connect to hundreds of different data sources, including Dynamics 365. Therefore, it's very easy to get connected and get meaningful data right away.

Additionally, Power BI reports and dashboards can be extended to accommodate a variety of use cases.

Microsoft Dynamics 365 Online for Power BI lets you easily access and analyze your data. Power BI uses the Open Data Protocol (OData) feed to create a descriptive model that includes all the tables and measures that are needed, like accounts, activities, opportunities, product, leads, and users. After you install the app, you can view the dashboard and reports in the **Power BI service**<sup>1</sup>, and in Power BI Mobile. The dashboard and reports are meant to provide operational reporting about near-term data, where the focus is on a specific team or group. Each query can retrieve a maximum of 100,000 rows from Dynamics 365 Online.

## Showing Power BI dashboards in Dynamics 365

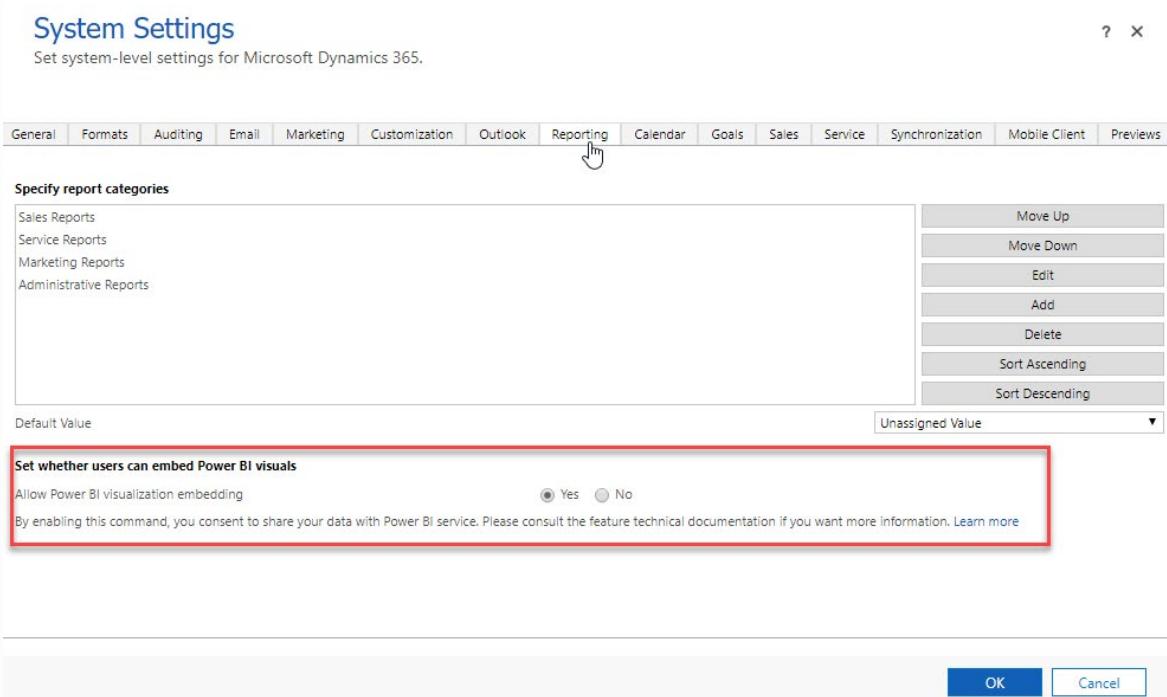
If you have Power BI dashboards and components that you want to appear in Dynamics 365, you can turn on the Power BI Integration. You will then be able to view these powerful visualizations directly from within Dynamics 365.

Here are the requirements for integrating Power BI with Dynamics 365:

- Only Dynamics 365 Online is supported.
- You must have an associated Power BI account.
  - The same Microsoft Azure Active Directory is used for single sign-on (SSO).
- Creation of Dynamics 365 dashboards requires existing Power BI dashboards and tiles.

To turn on the integration, go to **Settings > Administration > System Settings**. In the system settings, on the **Reporting** tab, select the option to embed Power BI visualizations in Dynamics 365.

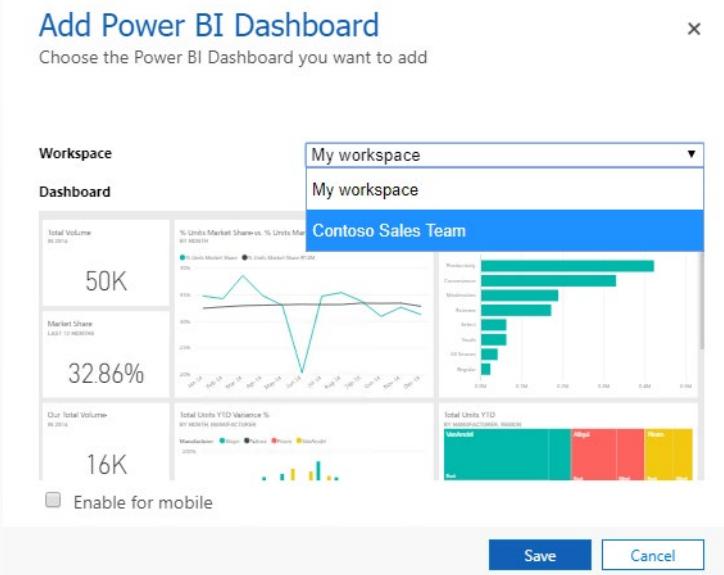
<sup>1</sup> <https://powerbi.com/>



After the integration is turned on, users will be able to perform these tasks:

- Add Power BI tiles to a dashboard.
- Add a full Power BI dashboard.

Power BI tiles and dashboards can be added only to personal dashboards. Therefore, system admins and system customizers can't create system dashboards that include Power BI visualizations.



Power BI dashboards can appear only on personal dashboards, and embed Power BI visualizations can be embedded only on personal dashboards. Therefore, admins can't create system dashboards that include Power BI items and that are visible to the whole organization.

Because Power BI connects to Dynamics 365 and part of the application, there are some limitations that you should consider when you're deciding whether to use Power BI:

- **Power BI doesn't run in the context of rows or users:** Unlike charts and dashboards, Power BI doesn't run in the context of a row or user. Although the functionality can be extended so that it includes links to individual records, this capability isn't available natively.
- **Data updates occur hourly or daily:** Power BI doesn't show a real-time view of Dynamics 365 data. The data is updated at specific intervals that depend on your pricing tier.
- **The application and service are separate:** Power BI is a separate application that connects to Dynamics 365 data. It might require other licensing in addition to your Dynamics 365 licensing.

## Power BI template apps

Power BI template apps are integrated packages of pre-built Power BI dashboards and reports. Using Power BI template apps with Dynamics 365 Sales provides a convenient, powerful, and quick way to access and analyze your sales data.

The following Power BI template apps are now available to analyze your sales data on Dynamics 365 Sales:

- Sales Analytics for Dynamics 365 Sales
- Process Analytics for Dynamics 365

You can connect to and analyze your Dynamics 365 Sales data by using these Power BI template apps. You can schedule automatic data updates to ensure that you can always make the most informed and timely decisions. You can also create your own custom Power BI dashboards based on the reports in these template apps and embed them directly in Dynamics 365 Sales.

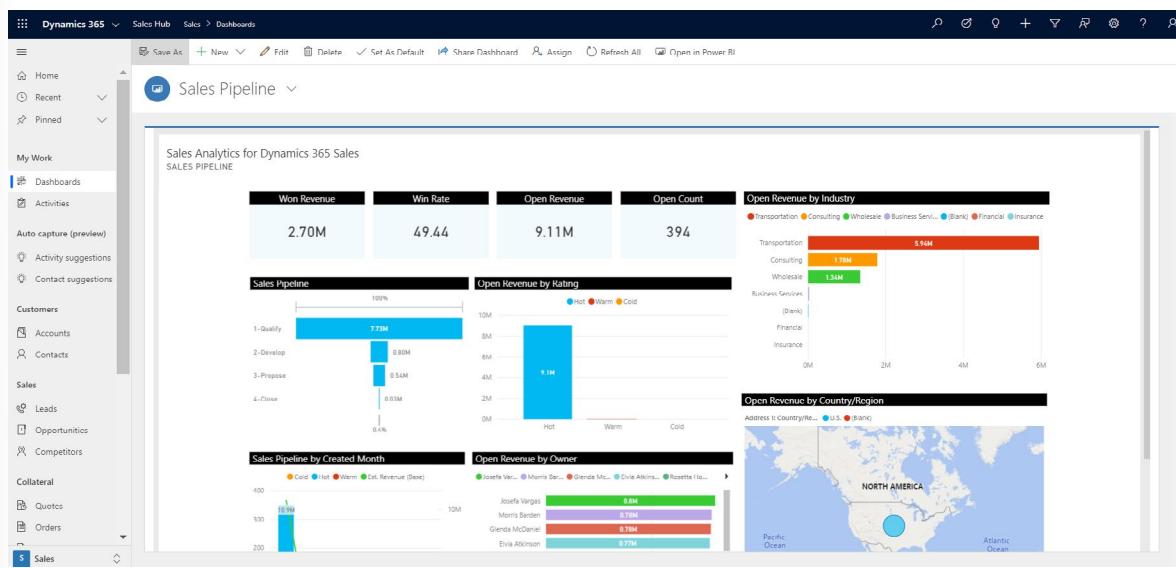
## Sales Analytics for Dynamics 365 Sales

Sales managers are responsible for managing sales representatives who work with customers to close deals every day. Sales managers need to have visibility over key operational and pipeline metrics to drive team performance.

Managers can see trends in these metrics over a period of time to understand how sellers are performing, so that they can take corrective measures, provide appropriate guidance to sellers, and improve the customer purchase experience.

As a sales manager, use this dashboard to perform the following tasks:

- Monitor the sales pipeline, sales leaderboard, and top deals.
- Analyze pipeline performance, won/lost deals, and lead closure.



## Process Analytics for Dynamics 365

The Process Analytics for Dynamics 365 Power BI template app is designed to help sales enablement managers get insights into the performance of their business process flows.

Sales enablement managers can track key performance indicators, including the velocity of rows through process stages to understand how efficient their organizational processes are, and fine-tune process definitions to achieve maximum efficiency.

As a sales enablement manager, use this template app to perform the following tasks:

- Track business process performance.
- Create custom dashboards that focus on just one business process.



For more information, visit **Configure Power BI template apps to work with Dynamics 365 Sales<sup>2</sup>** or **Customize Power BI template apps for Dynamics 365 Sales<sup>3</sup>**.

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<sup>2</sup> <https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/configure-sales-template-apps>  
<sup>3</sup> <https://docs.microsoft.com/en-us/dynamics365/sales-enterprise/customize-template-apps>



## Module 6 Work with Dynamics 365 Sales Insights

### Configure Sales Insights

#### Sales Insights configuration overview

Do your sellers have good relationships with their customers? You might be surprised by customers' answers to that question. While you might perceive your relationships as good, your customers might see it differently.

Many factors can influence a relationship with a customer such as when you reach out, the speed of your responses, and even the speed of their responses to you. Dynamics 365 Sales Insights uses AI to help you build and sustain good customer relationships.

Sales Insights includes three parts:

- **Free Sales Insights features** - Includes basic Assistant cards, Auto capture, and Email engagement. These features are provided at no extra cost with Dynamics 365 Sales licensing.
- **Advanced Sales Insights features** - Include Assistant (full capabilities) with studio, Notes analysis, Relationship analytics, Who knows whom, and predictive lead and opportunity scoring.
- **Sales Insights app** - Uses analytics and data science to gather data from call recordings, Dynamics 365 Sales, and Microsoft 365 to provide information and insights to help you intelligently manage the sales team, proactively coach sellers, and quickly answer questions regarding the business.

Some Sales Insights features are available for free in the application while others will require an additional Sales Insights license so that you can use them in your organization. Depending on which features are available to them based on their licensing, administrators can enable and configure certain Sales Insights features as required by their organization.

To use the advanced features, you must purchase a Dynamics 365 Sales Insights license or start a trial. Regardless of whether you are using the free or the advanced features, you will still go to the same place in the application to configure. To configure the Sales Insights features, you might need to be a Dynamics 365 Sales Administrator.

## Before you begin

Sales Insights uses integrations with several other applications for many of its features. For example, LinkedIn data can be used in Relationship analytics, if the solution is installed in Dynamics 365 and configured correctly.

Before you configure Sales Insights, we recommend that you set up and configure the following features:

- **Email** - Ensure that an Exchange email server is configured and that mailbox records have been enabled for each user that will be taking advantage of features such as Auto capture, Email engagement, and Relationship analytics.
- **LinkedIn** - If you want to use LinkedIn data for Relationship analytics, verify that the LinkedIn solution is installed in Dynamics 365 Sales and write-back from LinkedIn Sales navigator is enabled.
- **SharePoint & OneDrive for Business** - To take advantage of the shared attachment options with Email engagement, you will need to enable SharePoint and OneDrive for Business Integration in your organization.

## Enable advanced Sales Insights

When you deploy Dynamics 365 Sales, the free insights features will be available in your organization. Some of the features might not be fully configured, but they will appear in the application. The advanced Sales Insights features will not be available by default. Enable these features by accepting the terms and conditions for your organization.

You can access all Sales Insights features from the Sales Hub app by changing the area to **Sales Insights Settings**. You will see an option to **Try Sales Insights** from the **Get advanced AI capabilities with Sales Insights** section. The installation takes several minutes to complete, and then the status appears in the status bar.

After the installation is complete, you are ready to configure the advanced Sales Insights features.

**Sales Insights settings**

Help your sellers focus on the deals that matter most, and guide them to success, with our full suite of intelligent features. [Learn more](#)

Note: Sales Insights capabilities that aren't marked as "free" or "preview" require a Sales Insights license.

<b>Assistant (full capabilities)</b> Customize, prioritize, and create new insight cards for your organization with the assistant studio. <a href="#">Learn more</a>	<a href="#">Manage &gt;</a>
<b>Auto capture (free)</b> Capture emails and meetings automatically, to simplify data entry for your team. <a href="#">Learn more</a>	<a href="#">Manage &gt;</a>
<b>Email engagement (free)</b> Enable read receipts and follow-up reminders to help sellers keep track of engagement with customers. <a href="#">Learn more</a>	<a href="#">Manage &gt;</a>
<b>Notes analysis</b> Notes analysis suggests actions that sellers can perform based on interactions with customers. <a href="#">Learn more</a>	<a href="#">Manage &gt;</a>
<b>Relationship analytics</b> Prioritize customers using machine learning signals from Office 365 and Dynamics 365. <a href="#">Learn more</a>	<a href="#">Manage &gt;</a>

The Sales insights configuration screen is divided into four sections:

- **Assistant studio** - Provides access to the new Assistant studio, where you can create new and edit existing cards, as well as controlling assistant card access and modifying optimization rankings.
- **Productivity intelligence** - Provides quick access to productivity-related features in Sales Insights such as Auto capture, Email engagement, and Notes analysis.
- **Connection insights** - Provides quick access to relationship and connection-related features in Sales Insights such as Relationship analytics, talking points, and Who knows whom.
- **Predictive models** - Provides quick access to the predictive scoring features that are available in Sales Insights such as Lead scoring and Opportunity scoring.

## Create insight cards with Assistant studio

The Assistant (formerly known as Relationship assistant) provides actionable insight cards for users in Dynamics 365 Sales. These insight cards might range from reminding you of an upcoming meeting, providing flight information, or providing recommendations on products or next steps. The Assistant has evolved since its first introduction to ensure that it provides your sellers with the best and most relevant information to help win deals and keep customers. One feature that customers wanted was to have more control over cards, including the ability to create insight cards for their organization.

To help customers with this request, the assistant administration experience was redesigned. You can still perform tasks that were previously freely available, such as turning cards on and off and setting thresholds for certain cards. In addition, with the advanced capabilities, you have greater total control over the entire feature with the ability to create customized insight

cards and optimize card ranking for your Dynamics 365 Sales organization. When you enable Advanced features, you will also enable the Assistant studio.

The screenshot shows the Microsoft Dynamics 365 Assistant studio interface. At the top, there's a red box around the 'Create a new insight card' button. Below it, a red box highlights the tabs: 'Popular cards' (selected), 'Recent', 'High priority', and 'Created by my org'. A red box also surrounds the search bar. A red line connects the tab section to a table below, which contains five rows of card details. The table has columns for 'Card name', 'Modified', 'Description', and 'High priority'.

Card name	Modified	Description	High priority
Upcoming Meeting (Exchange)	28 d ago	Here's what you have going on today.	✓
Recent Meeting	37 d ago	Add meeting notes for your recent meetings.	✓
Stake holder Recommendation	28 d ago	We've found new stakeholders you might want to add to your open opportunities.	✓
Missed Email	28 d ago	You have emails from customers that are still unread.	✓
Missed closed date	37 d ago	Some of your open opportunities have missed their close dates.	✓

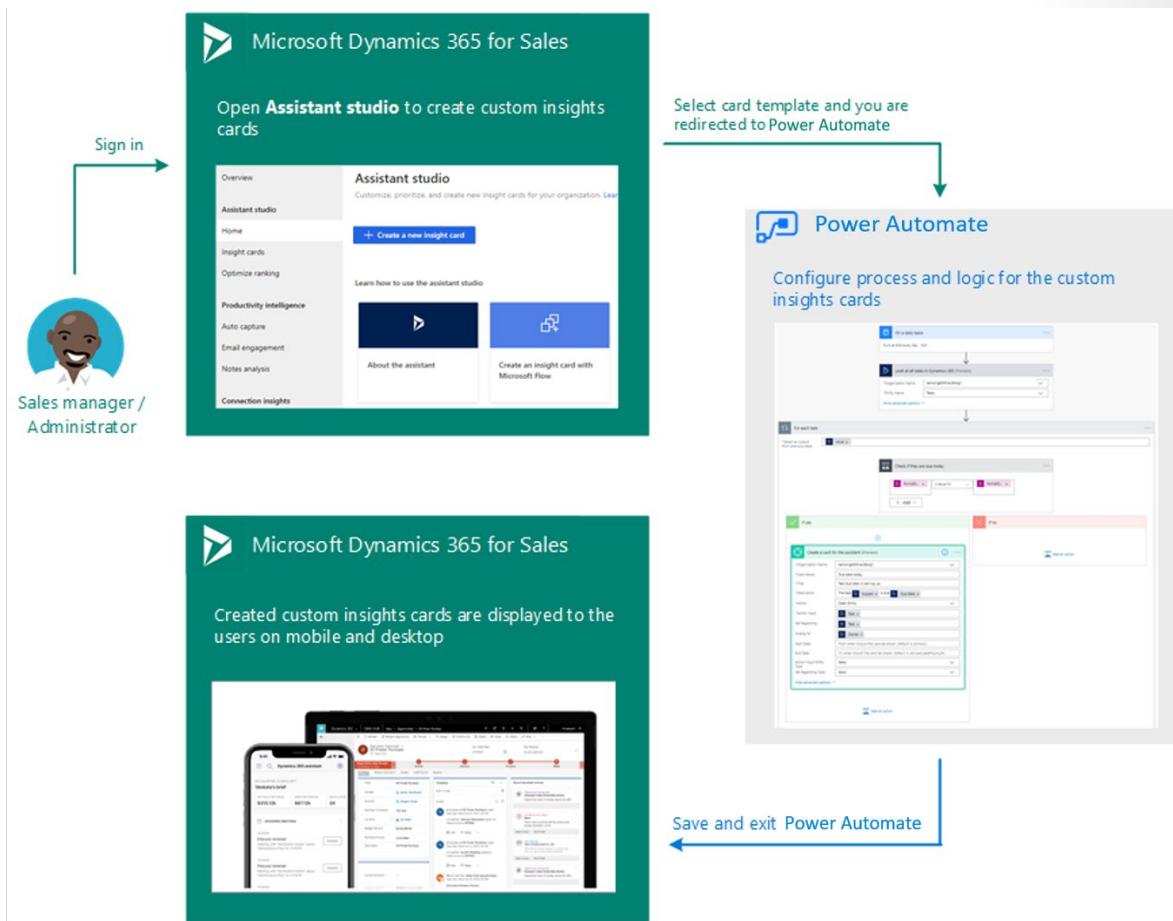
Assistant studio provides the following features for administrators:

1. **Create custom insight cards** - With Power Automate and a connector for Sales Insights, you can build custom cards that are triggered based on the specific needs of your organization.
2. **Quick view cards through tabs** - Tabs allow you to quickly view insight cards that are most popular, recently used, high in priority, and created by your organization.
3. **Table with card details** - Displays the cards that are available in your organization. On the cards, you can perform actions such as edit the settings, disable, assign to security roles, and prioritize.
4. **Search cards** - This feature allows you to search cards that you want to view or manage.

## Create custom insight cards

Each organization performs its daily tasks differently. While your company might perform tasks a certain way, other organizations might approach similar tasks another way. For this reason, administrators or sales managers can create suggested actions that are more relevant to your organization through the assistant management feature. By using events and conditions, you can

customize the circumstances on when to create suggestions and push information into the seller's workflow. This method helps sellers close deals faster. The following graphic illustrates a high-level flow of insight card creation.



You can create new insight cards from the **Assistant studio** page by selecting the **Create a new insight card** button. Depending on your specific needs, you can create insight cards from empty Power Automate flows, or you can use one of several existing templates. We recommend that you initially use a template until you understand how the different pieces flow together during the process. For example, you might have a task or other item with a due date approaching. In that case, you can select the **For due date coming up, show an assistant insight card** template.

As with all Power Automate flows, your connections will be checked to ensure that they are valid connections to the sources that you are attaching to, such as Microsoft Dataverse and Dynamics 365 Sales Insights. You will not be able to continue until you have signed in with valid credentials.

When in the designer, notice that a preconfigured flow will be displayed. For example, you previously created an insight card for a task with a due date approaching. The flow would have three steps predefined, and they might resemble the following example:

1. **Create schedule** - Defines when you want to display the card, such as running every day at a specific time. Additional options could be defined in the parameter section to represent items like time zones.
2. **Define operation** - Specifies which records you want to use to populate the cards, such as all tasks that are scheduled to end between the current time today and tomorrow.
3. **Define control** - Tells the application what to do for each item it identifies, such as creating an insight card for each identified task.

The insight card will define the following parameters:

- **Organization Name** - Organization that you want to trigger the card in.
- **Card Name** - The name of the card that you want to create.
- **Description** - Summary of basic information to be displayed on the card.
- **Action** - Links that help you complete whatever type of action that the card is recommending.
- **Action Parameter** - The ID of the created action.

Optionally, you can configure the advanced options for the condition.

Select **Show advanced options** and then update the **Title, Start Date, End Date, Display to, Reason, Regarding Object ID, Action Parameter Entity ID Type**, and **Regarding Object Type** parameters.

When you select a text box, the dynamic content pane appears. You can select and add the relevant fields. These dynamic content field variables and values that are displayed by these fields change according to the information that is passed.

## Work with Assistant studio

In addition to helping you create new insight cards, Assistant studio also lets you modify settings that are related to existing cards. For customer insight cards that are created from the studio, you can modify the job that is associated with the card. For cards that were available out of the box, you can make general changes such as:

- Turning cards on or off
- Controlling access to cards by assigning security remove roles
- Set a card's priority
- Edit the flow of a card (only available for custom cards)

## Turn cards on or off

Frequently, users have different needs as they relate to cards. Some users might require access to specific cards, while others will not. Cards can be turned on or off as needed, or you can assign cards to specific security roles to provide another layer of control.

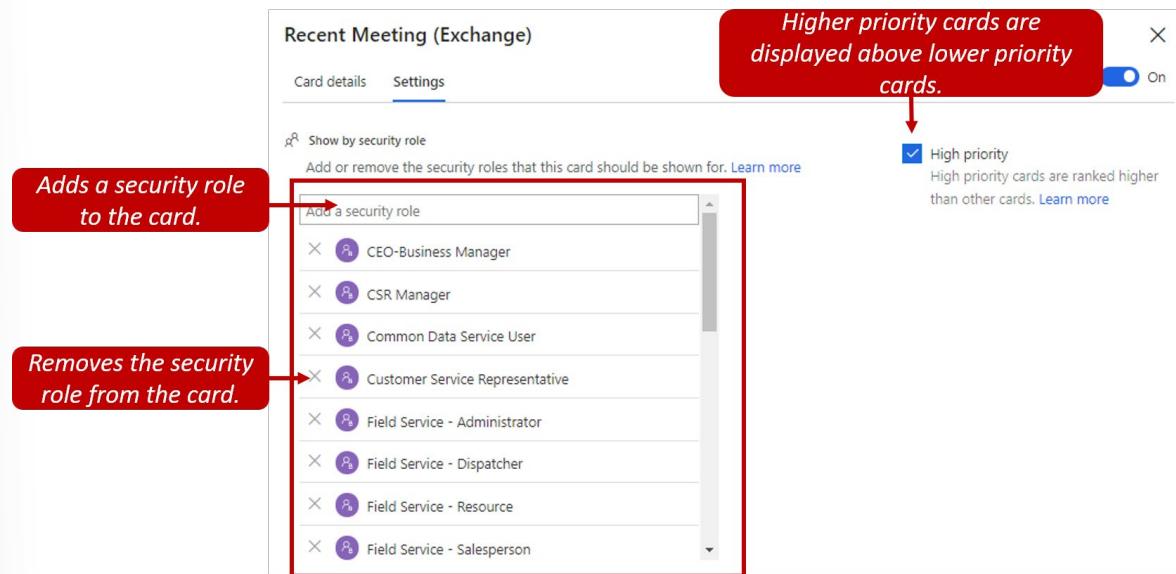
The screenshot shows a list of cards in the Dynamics 365 Cards interface. At the top, there are filters: 'All', 'High priority', and 'Created by my org'. Below the filters is a table with columns: 'Card name', 'Modified', and 'Description'. The first card in the list is 'Recent Meeting (Exchange)', which has a red box drawn around its preview area. A tooltip below the preview says: 'Hovering over a card will display a preview of what the card will look like.' The preview window shows the card's title, subtitle, and description, along with a 'Open Appointment' button.

You can turn cards on or off by opening the card and using the toggle switch. When a card is turned off, the card is disabled for every security role that is assigned to the card, but it does not disable other properties that are associated with the card. For example, custom cards that you generated by using Power Automate can be disabled, but you are not able to delete the Power Automate flow. Even after you disable the card, the flow remains active because other custom insight cards might use the flow.

The screenshot shows the settings page for the 'Recent Meeting (Exchange)' card. At the top, it says 'Recent Meeting (Exchange)'. Below that are tabs for 'Card details' and 'Settings', with 'Settings' selected. Under 'Card preview', there is a preview window showing the card's content. To the right of the preview is a toggle switch labeled 'On' with a red arrow pointing to it. A tooltip says: 'Disables the card for all security roles that have access to it.'

You can turn multiple cards on or off simultaneously by selecting all cards that you want to work with and then selecting the **Turn card on or off** toggle switch according to your requirements.

Another way that you can control how cards are displayed is by turning cards on or off based on specific security roles. From the **Manage insight cards** screen, you can filter the cards based on the role. Choose the cards that you want to turn off for the selected role and then select **Remove for role name**. The cards will not show for the role that you have selected.



When creating a card, you must specify the security roles to whom you want the card to display. By default, any custom cards that you create will be assigned to the security roles of Salesperson and Sales manager. You can edit the card to either assign or remove the security roles. When you open a card from the **Manage insight cards** screen, you will see a **Display Settings** tab, where you can define which roles should or should not have access to the card.

Occasionally, scenarios might occur where some cards have a higher priority than other cards. For example, you might want meeting reminder cards to have a higher priority than other cards. When you set a card as a priority, the card is displayed to the user at the top. When you view the list of insight cards, a check mark corresponding to the card in the **High priority** column specifies that the card is set as priority. You can also select high priority cards from the **High priority** tab.

## Optimize ranking of insight cards

As your organization defines and enables more cards, they will all be displayed in the same spot, generally. Unfortunately, when this situation occurs, users might miss cards that are important or need follow-up. To ensure that this situation does not happen, the Assistant includes an **Optimize ranking** option. This option lets you optimize the ranking of cards that are more important than others and promotes those cards to display at the top of the list.

You can define up to four rules in the ranking section. Rules can be based on Accounts, Leads, Contacts, and Opportunities. Cards are given a priority in the order that you define. For example, suppose you created two rules:

- **Rule 1** - Prioritize cards where the annual revenue is above USD 100,000.
- **Rule 2** - Prioritize cards where the estimated revenue is above USD 10,000.

The Assistant will analyze the cards and display those with annual revenue of more than USD 100,000 first, followed by those with estimated revenue of more than USD 10,000, and then will display the cards that are not prioritized last.

When defining rules, you can use one of the four following properties when editing the rule:

- **Name of the entity** - Defines if the rule should apply to cards that are associated with the Account, Contact, Lead, or Opportunity entity. Each rule can only be associated with one entity.
- **Attribute type** - Defines the attribute that will be checked to see if the rule applies.
- **Condition** - Specifies that a card is displayed when the set condition is met.
- **Value** - The value specifies the unit of measure for a condition to validate for the attribute type.

Returning to the previous example, if you want to configure that scenario, you need to define two individual rankings, as shown in the following graphic.

#### Optimize ranking (preview)

Insight cards are automatically prioritized based on AI ranking rules. You can customize the default rules to optimize card ranking for your organization. [Learn more](#)

The screenshot shows a user interface for defining ranking rules. There are four rows, each representing a rule. Each rule consists of a checkbox, a dropdown for 'Cards related to', a dropdown for 'with', a dropdown for 'operator', and a dropdown for 'value'. Rule 1:  Cards related to Account with Annual Revenue greater than 100000. Rule 2:  Cards related to Opportunity with Est. Revenue greater than 10000. Rule 3:  Cards related to Lead with Rating equal to Warm. Rule 4:  Cards related to Contact with Status equal to Active.

Ranking rules are applied in the order in which they appear

The first rule states that any cards that are related to an Account with Annual Revenue that is more than USD 100,000 should be considered top priority. Those cards will display before any others. After that, any cards that are related to an Opportunity with Est. Revenue of more than USD 10,000 will show.

You would also need to select the box next to each rule to specify that it is active. Any rules that are not selected will be considered disabled. After you have completed your optimization rankings, select **Save** to save the rule.

## Configure productivity intelligence

The productivity intelligence features of Sales Insights are designed to help your sales team bolster their overall productivity. For example, you can enter a quick note into the application to remind you to call Becky on Friday. Features like Note analysis will analyze the contents of the note and can automatically create a phone call activity based on the note's contents.

Sales Insights productivity intelligence consists of three features:

- **Email engagement** - Tracks email communication between sellers and their customers.
- **Auto capture** - Monitors email activities and suggests possible record associations-based factors (such as the sender) from the contents of the email.
- **Notes analysis** - Provides suggestions to auto create activities based on the text that is entered in a note.

## Set up and configure Email engagement

The Sales Insights Email engagement feature helps users become more productive by tracking communication with customers, such as when they open and forward email communication. Email engagement can also provide delivery suggestions and trigger reminders. When getting ready to configure Email engagement, you should know that it does use some of the Assistant's notification features. To ensure that Email engagement is working as intended, we recommend that you also enable the Assistant for your organization as well.

## Before you begin

As with many of the Sales Insights features, Email engagement does rely on other technologies to support its functionality. It provides two primary features:

- **Email tracking** - Provides the ability to track and provide reminder information that is related to emails that you send to your customers.
- **Attachment tracking** - Provides the ability to see when people open and interact with attachments in a tracked email.

To take full advantage of these features, you might need to enable additional functionality in your organization.

## Attachment tracking

When users send tracked emails, they can also elect to include tracked attachments. This method will notify users when someone opens their email and when the individual attachments are opened as well. All tracked attachments are stored in a OneDrive for Business folder. Dynamics 365 Sales will need to have OneDrive for Business enabled. Before you can enable OneDrive for Business, you'll need to first enable server-based SharePoint integration and enable SharePoint's document management capabilities for the email activity entity. After SharePoint integration is enabled, you can enable OneDrive for Business in Dynamics 365.

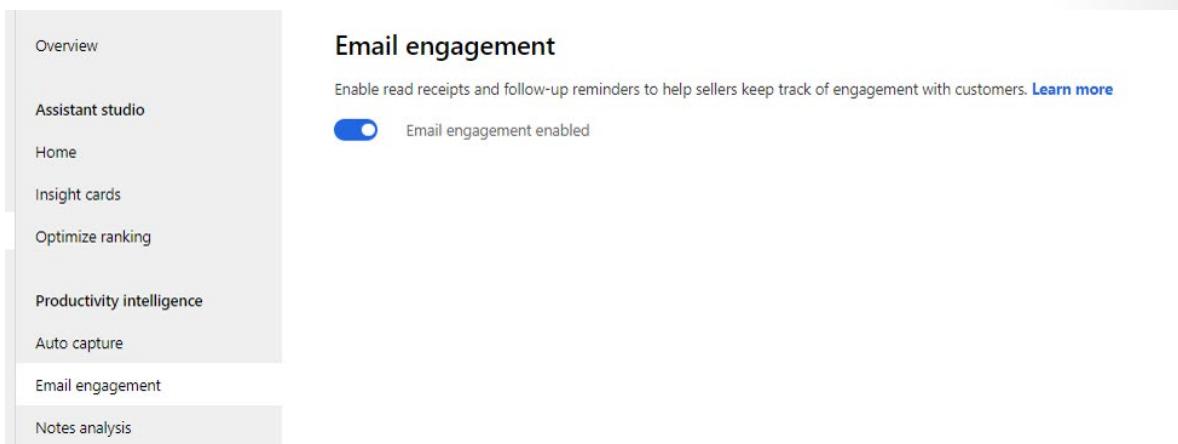
## Delivery recommendations

When you attempt to send an email to a customer outside of their working hours, Email engagement will review whom you're sending the email to and provide delivery time recommendations based on the recipient's time zone. For example, if you're attempting to send an email to a customer during the weekend, Email engagement will alert you that it's likely outside of their work hours and will provide you with an optional alternative time. This functionality takes advantage of Bing Maps. To ensure that it will work correctly, you must enable Bing Maps in Dynamics 365 Sales from the **System Settings** dialog box.

## Configure Email engagement

After you've satisfied the prerequisites based on the features, you will want to take advantage of those features. You can enable Email Engagement from the Sales Insights settings area of the Sales Hub application. When you first enter the Email engagement feature, you'll be prompted to grant permissions. This process only needs to be done once. After permissions have been granted, this step will be skipped in the future.

Enabling email engagement consists of the **Turn on Email engagement** toggle.



## Configure and enable Auto capture

The Auto capture feature of Sales Insights enables Dynamics 365 to access email in Microsoft Exchange to find and display messages that are related to a sales representative's work in Dynamics 365. This feature simplifies your ability to see relevant email messages together with all the other activities that are related to a given record in Dynamics 365.

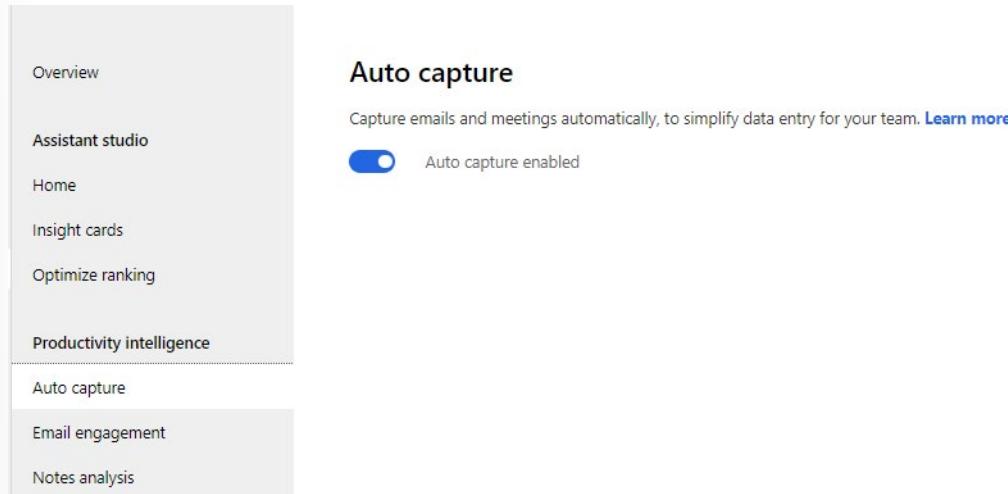
### Prerequisites

Because the Auto capture feature monitors users' email communication, your organization will first need to meet the following prerequisites before enabling and using Auto capture.

- Your organization must be using Microsoft Exchange Online as your email server.
- Users must be using the web client for Dynamics 365 Sales (other programs aren't supported).
- For each user that requires access to this feature, their email address must be approved, and their mailbox must be enabled.
- To track incoming email messages that Auto capture suggested, you must set up server-side synchronization.

### Enable Auto capture

After you accept the privacy statement for Sales Insights, Auto capture should be enabled by default. You can verify that it is enabled by going to the Sales Insights settings area and selecting **Auto capture**. If it's not enabled, select the toggle button to enable Auto capture.



### Notes analysis

The Notes analysis feature in Sales Insights is an excellent way to use intelligent autosuggestions when users enter notes about a recent meeting or discussion with a customer in Dynamics 365 Sales. Notes analysis will provide suggestions for creating records based on the data that is entered into the note.

Notes analysis doesn't have any other prerequisite features that need to be enabled first. You can enable it from the Sales Insights settings area of the Sales Hub application.

## Configure Connection insights

With the Connection insights features in Sales Insights, your organization can build stronger, long-lasting relationships with your customers. These features can let your sellers know when a relationship with a customer is not as strong as it could be. Additionally, these features can even provide suggestions on conversation starters for specific customers based on past communication. The Connection insights tools can help you from the beginning of a sale to the end.

Three features that are categorized under the **Connection insights** heading are:

- **Relationship analytics** - Monitors activities between you and your customers to provide an overall health score. Actions can be triggered as the score changes so you can keep aware of the relationship.
- **Talking points** - Identifies relevant subjects such as sports, entertainment, or family-related items from past customer communications and provides them as possible conversation starters.
- **Who knows whom** - Identifies others inside your organization that might have an existing relationship with a lead or contact and provides you with the ability to request an introduction.

## Configure Relationship analytics

Sales Insights Relationship analytics provides a graphical representation of KPIs and activity history for any contact, opportunity, lead, or account to users of the application. Before relationship analytics can be available to your users, you will need to configure it from the Sales Insights settings area of the Sales Hub application.

After you enable Relationship analytics, you will need to define which data sources that the feature should use to collect the data that is used for tracking key performance indicators (KPIs) and overall health.

Three data sources that you can use are:

- **Dynamics 365** - Ingests all historical data from Dynamics 365 Sales. This option is required and turned on by default when you enable Relationship analytics.
- **LinkedIn** - Data from LinkedIn will be ingested for KPI and health computation. (This option is only available when LinkedIn is installed in Dynamics 365 Sales.)
- **Exchange Data** - 30 days of data from Exchange is ingested for KPI and health computation. Exchange connector ingests three days of data each day until the last 30 days of data is complete.

## How the relationship health score is calculated

Relationship analytics looks at key activity types when evaluating the overall health of a customer relationship. Those activity types are

emails, appointments, phone calls, and tasks. Relationship analytics does not just look at the volume of activities for each type, it also considers other data such as the total time spent on an activity. It evaluates this data for your team and your customer's team.

The following table defines how this data is looked at in more detail.

Data	Initiated or completed by your team	Initiated or completed by the customer's team
Emails	Total number, Total time spent, Timeline (number each week), Number of replies	Total number, Total time spent, Timeline (number each week), Number of replies, Interaction results for followed emails (opens, attachment views, and link views)
Appointments	Total number, Total time spent by your team (if several team members were present at an appointment, then the duration is multiplied by the number of team members present), Timeline (number each week)	Total number, Total time spent (not multiplied by the number of customer contacts that were present), Timeline (number each week)
Phone calls	Total number, Total time spent, Timeline (number each week)	Total number, Total time spent, Timeline (number each week)
Overall (all activities)	Total time spent	Total time spent

Many organizations will place different emphasis on different types of communication based on how they typically do business. To ensure that relationship analytics is calculating scores based on how you do business, you can modify the importance of different activity types as they contribute to the relationship health score. For example, if most of your communication with your customers is through email and phone calls, you might want to set the activity weighting a little higher on those activity types and set the weighting lower on activities like tasks and meetings. This approach will ensure that the communication methods that are most important to your organization will be treated as such when the analytics score calculates.

#### Relationship Health Score

Select weighting for activity types:



## Communication Frequency

Another key influencer on overall relationship health is defining the expected frequency of communication with customers. Businesses have varying sales cycles and different expected levels of communications with customers. By defining a longer expected communication frequency, it reduces the expectation of more frequent communications in the overall health score. A shorter expected communications frequency increases the expectation of more recent frequent communications in the health score. When defining the relationship analytic settings, you might want to experiment with the individual settings until you have found the optimal settings for your organization.

### Communication Frequency

How often do you plan to communicate with your customers?

Once every couple of weeks
Once In A Day
Once every few days
Once In A Week
Once every couple of weeks
Once In A Month

## Configure Talking points

Talking points in Sales Insights provide a mechanism to automatically identify potential conversation starters from your email conversations. The conservation starters can include topics that are related to sports, vacation, family, and entertainment. These insights are made available to users right from the contact page.

Talking points are enabled from the Sales Insights settings area on the Sales Hub application. When you turn on Talking points for your organization, you can enable any or all the Talking point categories: Health, Family, Sports, and Entertainment.

## Configure Who knows whom

With the Who knows whom feature, users can quickly identify colleagues within their organization who can introduce them to leads or contacts. Who knows whom is currently available only in the North America (NAM) region.

Who knows whom is enabled from the Sales Insights settings area on the Sales Hub application. After you have turned on the feature, you can also select an email template based on your organization's requirements.

## Configure predictive models

The predictive lead and opportunity scoring capabilities of Dynamics 365 Sales Insights use machine learning models to calculate a score for all open leads and opportunities. These scores help sales people prioritize and achieve higher win rates. When an organization configures the

predictive scoring features, the application uses out-of-the-box fields that are related to leads and opportunities to generate a model with a score.

## Configure predictive lead scoring

Before using predictive scoring models, you need to ensure that the advanced Sales Insights features have been enabled in your environment by adding Sales Insights licensing. After the advanced features have been enabled, you can create scoring models by going to the Sales Insights settings area of the Sales Hub application.

When you have enough qualified and disqualified leads, the application will allow you to create a scoring model. The initial creation of the model can take a while. Progress will be displayed on the screen during the configuration process. You can still use the application while configuration is taking place.

After the creation of the model is complete, you should verify that the prediction accuracy score matched your organizational requirements. If you are not satisfied with the prediction accuracy score, you can discard the current model and retrain to create an updated model. We recommend that you train the model after the data has been refreshed in your organization for better prediction accuracy scoring.

When the model is created, it will define a scoring range for each grade. A lead scoring model has the following grades:

- **Grade A (green)** - Highest likelihood for conversion into an opportunity.
- **Grade B (purple)**
- **Grade C (yellow)**
- **Grade D (red)** - Lowest likelihood for conversion into an opportunity.

**Predictive lead scoring**

Predictive lead scoring calculates the relative likelihood of a lead converting. To optimize the outcome for your specific business needs, you can edit the fields that are included, retrain the model, and publish a new version. [Learn more](#)

**Version details** [Published](#)

Version trained on December, 16 2019	Status Model Active	Attributes used 4/823 <a href="#">Retrain with recommended fields</a>	Prediction accuracy 66% Good to apply
Most influential fields Lead Source(Lead), No. of Employees(Lead), Job Title(Lead), Industry(Lead)			

**Lead score grading**

Lead qualification rate 18.25%	Max score 70	<a href="#">Save</a> <a href="#">Set to Default</a>	
<b>A</b> Lead score range 100 to 27 0.51% qualification rate (0.4x lift) 18.65% of total leads	<b>B</b> Lead score range 26 to 26 8.47% qualification rate (0.46x lift) 23.41% of total leads	<b>C</b> Lead score range 25 to 13 34.38% qualification rate (1.88x lift) 38.10% of total leads	<b>D</b> Lead score range 12 to 0 8.00% qualification rate (0.44x lift) 19.84% of total leads

*You can adjust the minimum score range for each grade based on your organization's criteria.*

**When you are confident in your model, publish it to apply it**

[Publish](#) [Retrain Model](#)

Each grade will have a minimum and maximum score. Because each organization might grade their leads differently, you can modify the scoring values that are associated with each grade. In the range that you want to modify, enter a minimum value of the range in the lead score. When you change the lead score range for a grade, the preceding grade's maximum range value changes automatically depending on the changed minimum grade value. For example, when you change the minimum range value score for Grade A to 51, the maximum lead score range for Grade B changes to 50.

When you feel comfortable with the results of your model, you can save and apply the model. The predictive lead scoring is now configured and ready to use in your organization. A lead score will refresh every 24 hours as information in the lead is modified. If you ever recreate a model, it will take 24 hours to apply the new model.

## Predictive opportunity scoring

The process for creating predictive opportunity scoring models is almost the same as the process for creating predictive lead scoring models.

Predictive opportunity scoring uses the details from past records to build and calculate the scoring model. Sales Insights required at least 100 disqualified opportunities and 40 qualified opportunities to create the scoring model.

When you have enough qualified and disqualified opportunities, the application will allow you to create a scoring model. The initial creation of the model can take a while. Progress will be displayed on the screen during the configuration process. You can still use the application while configuration is taking place.

After the creation of the model is complete, you should verify that the prediction accuracy score matched your organizational requirements. If you are not satisfied with the prediction accuracy score, you can discard the current model and retrain to create an updated model. We recommend that you train the model after the data has been refreshed in your organization for better prediction accuracy scoring.

When the model is created, it will define a scoring range for each grade. An opportunity scoring model has the following grades:

- **Grade A (green)** - Highest likelihood for conversion into an opportunity.
- **Grade B (purple)**
- **Grade C (yellow)**
- **Grade D (red)** - Lowest likelihood for conversion into an opportunity.

Predictive opportunity scoring

Predictive opportunity scoring calculates the relative likelihood of an opportunity converting. To optimize the outcome for your specific business needs, you can edit the fields that are included, retrain the model, and publish a new version. Learn more

You can adjust the minimum score range for each grade based on your organization's criteria.

Version details Published

Version trained on November, 23 2019 Status Model Active Attributes used 15/459 Retrain with recommended fields Prediction accuracy 47%

Most influential fields Est. Revenue(Opportunity), Identify Sales Team(Opportunity), Final Proposal Ready(Opportunity), Source Campaign(Opportunity), Identify Competitors(Opportunity)

Opportunity score grading

Save Set to Default

Opportunity qualification rate 50%	Max score 54		
A Opportunity score range 100 to 51 50.00% qualification rate (1.00x lift) 12.50% of total opportunities	B Opportunity score range 50 to 51 0.00% qualification rate (0.00x lift) 0.00% of total opportunities	C Opportunity score range 50 to 26 50.00% qualification rate (1.00x lift) 87.50% of total opportunities	D Opportunity score range 25 to 0 0.00% qualification rate (0.00x lift) 0.00% of total opportunities

Note: All values presented are based on historical data.

Each grade will have a minimum and maximum score. Because each organization might grade their opportunities slightly different, you can modify the scoring values that are associated with each grade. In the range that you want to modify, enter a minimum value of the range in the opportunity score. When you change an opportunity score range for a grade, the preceding grade's maximum range value changes automatically depending on the changed minimum grade value. For example, when you change the minimum range value score for Grade A to 51, the maximum opportunity score range for Grade B changes to 50.

When you feel comfortable with the results of your model, you can save and apply the model. The predictive opportunity scoring is now configured and ready to use in your organization. An opportunity score will refresh every 24 hours as information in the opportunity is modified. If you ever recreate a model, it will take 24 hours to apply the new model.

## Module 7 Create surveys with Dynamics 365 Customer Voice

### Create a survey project with Dynamics 365 Customer Voice

#### Dynamics 365 Customer Voice

Dynamics 365 Customer Voice provides organizations with a powerful survey tool to capture, analyze, and then act on customer and employee feedback. Consider all the touch points where you interact with a client, creating either a positive, neutral, or negative experience.

These experiences are often referred to as *moments of truth*, which generate a lasting impression of your organization. It's at these points that gathering feedback is essential.

Common examples of these experiences include:

- After a client support issue has been resolved and a case has been closed
- After a product has been purchased
- After a training session has been completed by a student

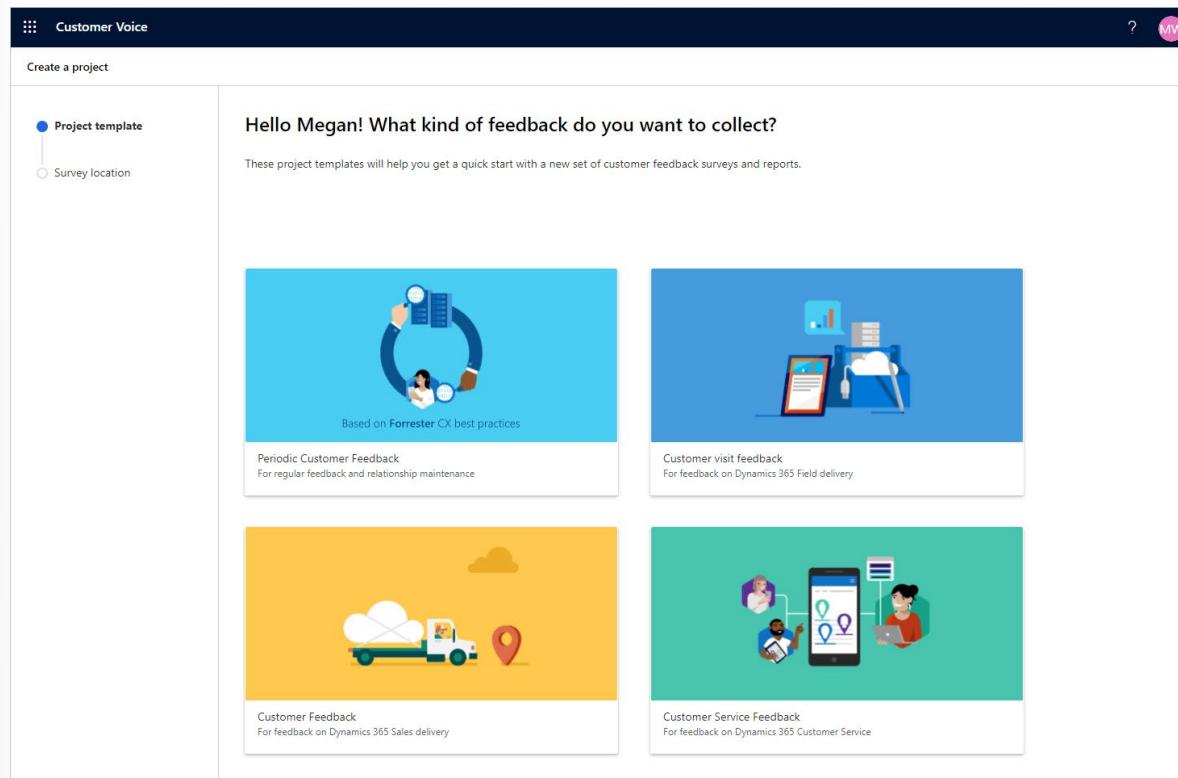
Dynamics 365 Customer Voice can be used to capture opinions and feedback from customers. Surveys can also be used to gather information that is needed, even before a respondent becomes a client.

Use cases of this information capture could include:

- Registering for an event that is being held
- Requesting details about provided services
- Completing a form that has been embedded on an online website product page

Dynamics 365 Customer Voice uses the concept of projects to divide and contain groups of surveys and reports. A project could contain one or many surveys to be used for different events or *moments of truth* throughout the customer relationship journey.

Keeping these use cases in mind, you can create surveys and processes by using Dynamics 365 Customer Voice to provide a smooth and interactive experience for any organization.



The surveys can contain several types of questions: choice, date, Likert, ranking, rating, text, and Net Promoter Score (NPS). NPS is a metric that is used to analyze the overall loyalty of customers. It measures a customer's perception of an organization, product, or service by asking how likely it is that they would recommend to friends or colleagues. Asking an NPS question on a survey then provides an overall Net Promoter Score, which provides another metric to assess customer satisfaction.

Dynamics 365 Customer Voice is included with select Microsoft Dynamics 365 subscriptions and is available as an upgrade for Microsoft 365 subscriptions. The surveys, questions, invitations, and responses are stored in Microsoft Dataverse.

While this information might help if you are using a Dynamics product or want to build a model-driven app in Microsoft Power Apps, it isn't needed when you are accessing and using Dynamics 365 Customer Voice:

- Surveys are created
- Survey questions are added to surveys

- Survey responses are completed by respondents
- Each response has survey question responses that are linked to the survey questions
- Survey invitations are sent out to customers or employees, making it a personalized survey
- The invites and responses are linked together and are both activities
- Contacts can also unsubscribe from Dynamics 365 Customer Voice surveys, which will create an Unsubscribe record to prevent additional survey invitations from being sent

Dynamics 365 Customer Voice uses Microsoft Power BI to display summary information and individual results in rich, real-time analytics. Survey insights are provided to show correlations between one or more questions, which help organizations see patterns in responses and gain a better understanding of customers.

Consider a case closure survey that asks for ratings on various aspects of the support experience (the support representative, the time to respond, knowledge, and so on) and also asks a Net Promoter Score (NPS) question. In an ideal scenario, if all feedback is positive regarding the levels of customer service that was provided, the overall NPS score that was given will likely also be positive. If everything is positive, and the NPS is low, it might be determined that, while the customer service that was provided at that moment was good, the overall opinion that the customer has of the company as a whole is poor; therefore, work is needed to figure out why and improve that opinion.

## Projects in Dynamics 365 Customer Voice

Before you create a new project, consider planning it beforehand to ensure that it is as effective as possible. A project should contain elements that are related to one another rather than including all of an organization's surveys into one main project. A project could contain all Customer Service related surveys that are distributed after a customer has purchased a product. From an ongoing account management perspective, a project could be created to contain surveys that are sent after a client visit, on an annual basis, or every six months.

When you are planning how to create a new project, consider the following questions:

- What is the purpose of this project?
- Who are the main stakeholders for this project that need to provide input?
- Does the project cross over multiple departments that have a variety of needs?
- Are clear objectives in place and are deliverables required for the project?
- Who will provide questions for surveys for the project?
- What other roles and collaboration is needed for the project?
- Does the project length have a timeline, or has a deadline been established for when this project needs to be delivered and completed?

Discussing and finding answers to these questions prior to creating the project can help you create a clear path and a solid plan that can determine how successful the project will be. By asking these questions first, you can review a project periodically throughout the duration and then again at the end. This approach helps you acknowledge project achievements and analyze the results. It might also help to learn from the project successes rather than adjust the next project based on the data.

The two main elements of a Dynamics 365 Customer Voice project are:

- Surveys: A project can contain one or many surveys.
- Reports
  - The reports section contains satisfaction metrics that cover all surveys within that project.
  - A response overview report will be created for each survey that is added to the project.

Other elements are included within each survey that provide a potentially unique experience for each one:

- Determining which survey metrics to capture
- Customizing a thank you and footer message
- Adjusting the theme color, fonts, and background
- Adding custom Cascading Style Sheets (CSS) design to style the survey further
- Creating and using survey variables for personalization needs
- Providing up to 23 language translations for a survey
- Formatting elements of the survey, such as displaying a progress bar and question numbers or shuffling questions when appropriate

When all planning is complete, a project can be created in Dynamics 365 Customer Voice.

## Create your first project

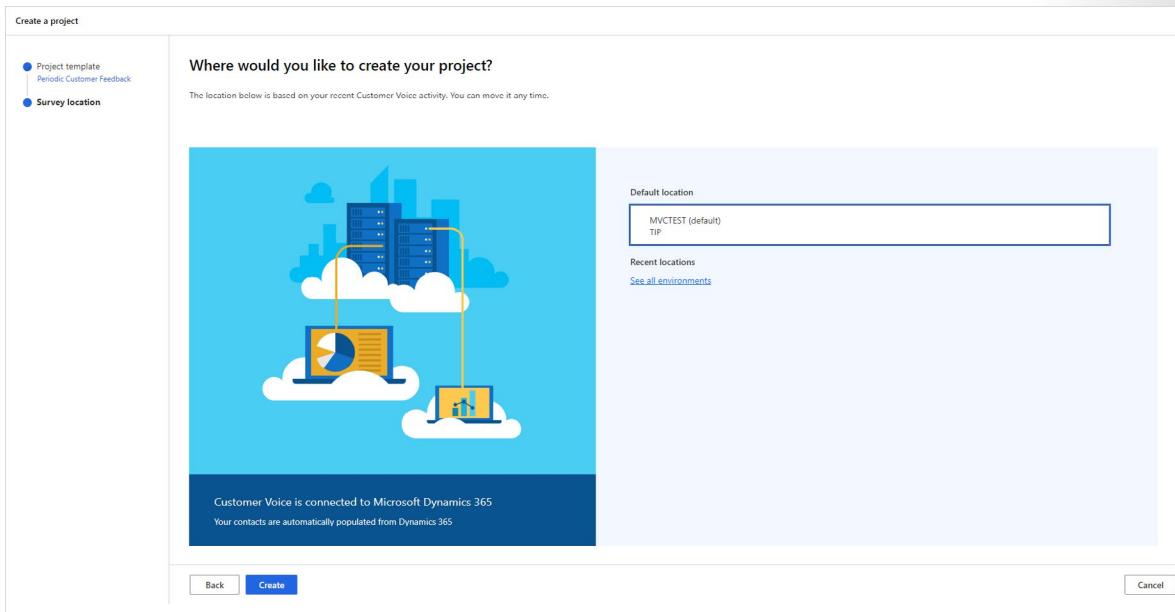
The planning has been done and the purpose for a project is understood. Now, it is time to create the project. Several project templates are provided in Dynamics 365 Customer Voice. These templates are designed to give the user a quickstart with a suggested survey and processes that relate to a specific type of feedback.

The following project templates are suggested.

Project Template	Template Purpose
Periodic Customer Feedback	For regular feedback and relationship maintenance
Customer Visit Feedback	For feedback on Dynamics 365 Field Service delivery
Customer Feedback	For feedback on Dynamics 365 Sales delivery
Customer Service Feedback	For feedback on Dynamics 365 Customer Service
Blank	Start from the beginning and create a new survey

After selecting the most appropriate project template for an organization's needs, the user should select the location of the project. The number of available locations to select from will be related to the number of different environments that are available to them in Microsoft Dataverse. If only Dynamics 365 Customer Voice is used, it will be the only available location to select from. However, if the organization has Dynamics 365 Customer Service, for example, a location will be displayed for each one that the user has access to. This environment might be PRODUCTION or SANDBOX. If the organization uses Dataverse and has created other model-driven Power Apps, these environments might also be listed.

A single *default environment* is automatically created and made available in Dynamics 365 Customer Voice. This environment can't be deleted and can be used for adding projects. However, if the purpose of a project is to collect data that is based on triggers such as case closures or product purchases, and these triggers occur in a Dynamics 365 or other Dataverse environment, the same environment should be selected when the user is creating the project.



After the project is created, if one of the templates is used, it will be given a specific name that is related to the template chosen. The project can be renamed to something that aligns more with the organization's objects, if necessary. A project can also be copied, shared, overwritten, and deleted. A project that is created from blank will show as **New project** until it is renamed to something more appropriate.

Selecting a project template also means that a survey template will be added as part of the project. For the Periodic Customer Feedback template, a survey is included with questions asking for feedback on the experience that a respondent has had in the last three months. The survey uses different types of questions, including rating, Likert, and text questions. Included on each question are various settings, which determine if the questions are required, have any restrictions, or have a subtitle displayed. The elements can be adjusted for each question, if necessary. Consider that slight adjustments will be needed to ensure that the questions meet the requirements of the company that the project has been created for.

Additional features might be included within the delivered survey, such as the addition of a variable, as shown in the following figure. In this example, **companyname** has been added as a new variable, and it is then used in the question title and also in some of the statements within the Likert question. If this variable is to be used, the project creator must update the default value with the actual organization name so that any surveys sent using the variable are accurate and make sense.

Variables	
Add up to 15 variables to personalize your survey for recipients. <a href="#">Learn more</a>	
Variable <input type="radio"/>	Default value <input type="radio"/>
First Name	First Name
Last Name	Last Name
locale	Enter default value
companyname	the company
<a href="#">+ Add variable</a>	

# Create surveys with Dynamics 365 Customer Voice

## Before creating a survey

Before you create a survey, consider planning it beforehand to ensure that it's as effective as possible. If a survey is too long, respondents might not complete it due to lack of time or frustration. If a survey is too short, it might not be possible to gather effective or valuable insight from the responses that are received.

Think about the purpose and desired outcome of the survey, and then consider the following questions:

- Is the survey at a logical point in the customer journey or after a *moment of truth*?
- What type of information do you need for the purpose of the survey? Only request information that you need. In other words, don't ask for personal data if you are asking for feedback on the closure of a case.
- Will the survey take more than five minutes to complete? People are time deficient. Asking them to complete a survey that takes too long will cause them to stop responding to any future surveys that you might invite them to complete.
- Could a prize drawing be offered for a survey to anyone who responds? This approach might not be appropriate for all surveys, but it could be a good incentive if you are gathering customer feedback on a larger survey once or twice a year.

After you have determined the answers to the questions and have confirmed the purpose of the survey, you can create it. The title of the survey will help explain the reason for it and will be visible to all respondents. A survey also includes a survey alias. Additionally, the alias will be used as an identifier if you are using Microsoft Power Automate and the Dynamics 365 Customer Voice connector. Therefore, make sure that the alias is internally relevant for those who create the surveys and that it makes sense to anyone who completes the survey.

The following question types can be used on a survey.

Question type	Description
Choice	Add options, allow multiple answers to be selected, and display as a drop-down list, if necessary.
Text	Question can capture a short or long answer and be flagged to capture overall sentiment for the survey. Restrictions can be applied to enforce a number, email address, or if a custom regular expression is entered.
Rating	Ratings can be captured by using numbers or stars from 1 to 10 or smiley faces from 2 to 5 on the scale.
Date	The <b>Date</b> field is captured in dd/mm/yyyy or mm/dd/yyyy format based on the default location of the Dynamics 365 Customer Voice environment. The format cannot be modified.

Question type	Description
Ranking	Options are added to the question, and respondents will rank the options in a specific order based on the phrasing of the question. For example: Rank the following options in order of preference to your organization.
Likert	The Likert scale is like a matrix. A series of statements is provided, and the respondent must select one of the options that best suits or meets the statement.
NPS	The Net Promoter Score is a rating on a scale of zero to 10, asking the respondent if they would recommend a product, service, or organization to a friend or colleague.
File upload	A new folder is created in the user's OneDrive for Business account. Responders will be able to upload their files to that folder. This option is not available when the survey is shared externally and the <b>Only people in my organization can respond</b> setting is turned off.

The screenshot shows the Microsoft Forms Pro interface. On the left, there's a sidebar with navigation links: Home, All Projects, New Survey (Surveys, New Survey, + New survey), Reports, Satisfaction metrics, and New Survey. The main area is titled "Survey 1" and "Design". The survey title is "Case Closure Survey" with the subtitle "Please provide us with your feedback on the recent support case we closed with you". The first question is "1. Overall, how do you think we did when working on your recent case ?" with a rating scale from sad to happy. The second question is "2. How likely are you to recommend us to a friend or colleague?" with a Likert scale from 0 (Not at all likely) to 10 (Extremely likely). The third question is "3. What is the primary reason for your score ?" with a text input field labeled "Enter your answer". At the bottom, there's a blue button labeled "+ Add new".

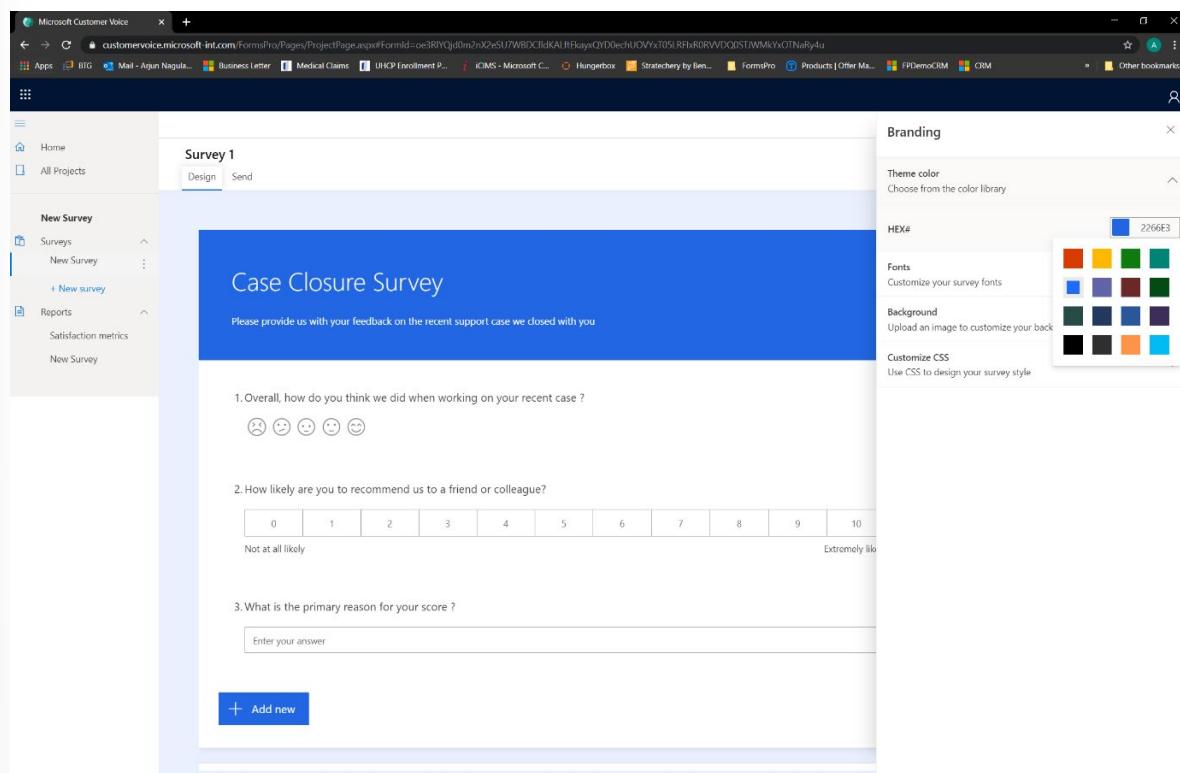
A survey can have up to 100 questions. Likert, choice, and ranking questions, along with their options/statements, count toward the overall 100-question limit. Therefore, if you include a Likert question with 10 statements, it will reduce the number of remaining questions to 90. The preceding figure shows a simple survey with a rating (smiley) question, a Net Promoter Score question, and a text field question. For longer surveys, a new section can be added after a question, creating pagination between blocks of questions. This approach can be a way to cleanly break up a survey that asks questions on different topics.

## Add a theme and branding

Every organization has its own set of branding and style guidelines. Typically, a company will have a marketing department that is responsible for determining the fonts, logos, and color scheme to be used for each item of communication between the company and its customers. Consistency is key when you are presenting any type of content to the outside world. Consistency helps you ensure that it's obvious where collateral has come from, providing brand recognition each time.

Dynamics 365 Customer Voice provides several ways in which a survey can be customized to fit in with a set of brand guidelines. This customization can be achieved by using the following elements:

- Theme background image
- Theme color
- Survey image or logo
- Font style, weight, color, and size
- Customized thank you message and footer text

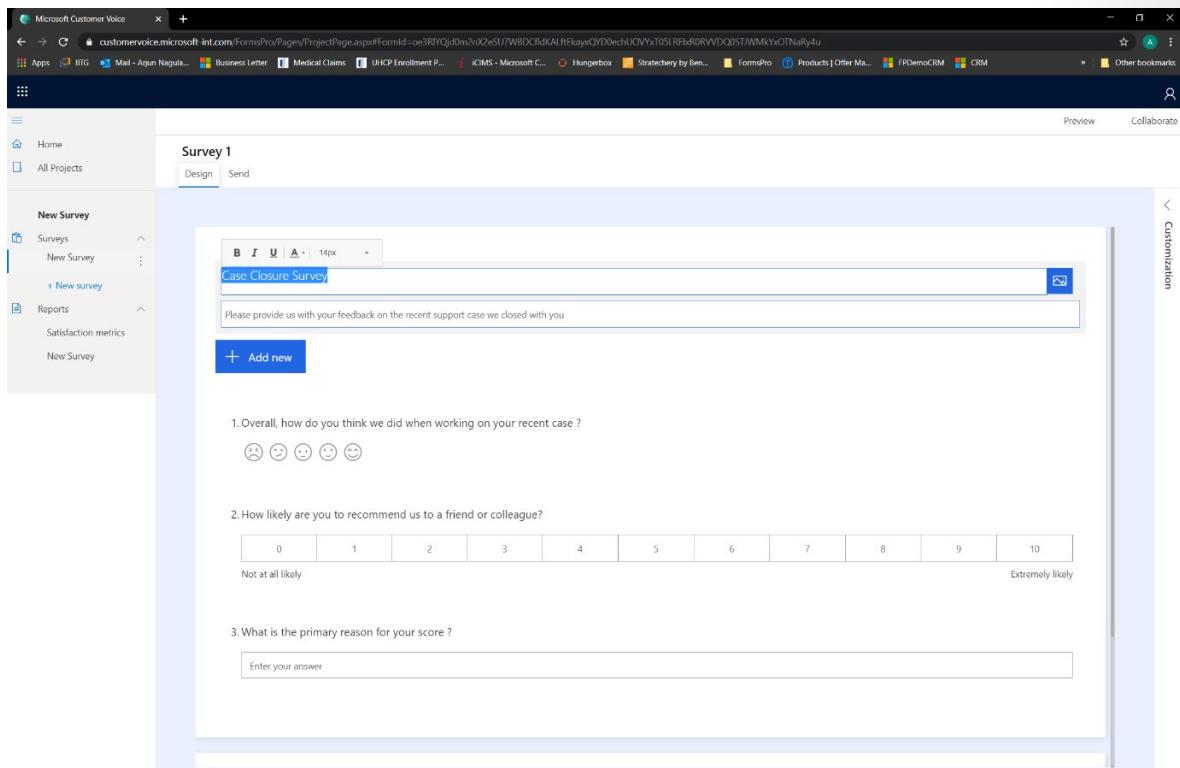


## Use a theme

The quickest way to transform a survey and add branding is to apply a theme color and background image. The color can be chosen from the color library of 16 preset colors, or it can be set by using a specific hex number, which can be obtained from an organization's marketing department. A lighter version of the color will be used if no background image is applied. A background image can be added by uploading from a local file or selecting an image from OneDrive. Keep in mind that when customers view a survey on a mobile device, the background image will not be visible and can only be seen while using a desktop or laptop as a workstation.

## Survey image or logo

An image or logo can be added to the survey header. The image can be uploaded from a local drive or OneDrive. After it has been added, the image will be displayed to the left of the survey title. It will also be applied to an email template by default, which can be removed if necessary.



## Font style, weight, color, and size

Another way of branding a survey is to adjust the fonts that are used in the survey title, survey subtitle, questions, and question subtitles. The font can be changed to be bold, italic, or underlined. The font color can be set by using a standard option, or you can set the color by selecting **More Colors**, choosing one of the other options, or using a hex number to set a specific color that is used by an organization. Several font styles are available to select from, and the font weight can be set as well.

The screenshot shows the Microsoft Customer Voice interface for creating surveys. On the left, there's a navigation sidebar with options like Home, All Projects, New Survey (selected), Reports, Satisfaction metrics, and New Survey. The main area is titled "Survey 1" and has tabs for "Design" and "Send". In the Design tab, there's a rich text editor toolbar at the top. Below it, a "Case Closure" section asks "Please provide details about the recent support case we closed with you". A color palette is open over this section. Below the editor, there are three survey questions:

1. Overall, how do you think we did when working on your recent case ?  
A rating scale from 1 to 5 with icons below it.
2. How likely are you to recommend us to a friend or colleague?  
A rating scale from 0 to 10 with "Not at all likely" on the left and "Extremely likely" on the right.
3. What is the primary reason for your score ?  
A text input field labeled "Enter your answer".

The status bar at the bottom shows "javascript:void(0);Automatic" and a system tray with various icons.

The font that is used for the header and the font that is used for the body can be changed from the **Branding** section of the survey. This font will then be applied throughout the survey.

This is a screenshot of the "Branding" settings dialog box. It contains several sections:

- Theme color**: A dropdown menu labeled "Choose from the color library".
- Fonts**: A section with a dropdown menu labeled "Customize your survey fonts".
- Header font**: A dropdown menu set to "Arial".
- Body font**: A dropdown menu set to "Verdana".
- Background**: A section with a dropdown menu labeled "Upload an image to customize your background".
- Customize CSS**: A section with a dropdown menu labeled "Use CSS to design your survey style".

## Customized thank you message and footer text

By default, when a respondent submits their response to a survey, a thank-you message will display stating, "Thank you for sharing your feedback. It will help to create better products and services." This text can be modified to show a different message and include hyperlinks, and you can modify it to display a different font by using the methods previously explained. The footer text can also be changed. By default, the footer text displays, "The feedback you submit will be sent to the creator of this survey." You can update this text to show information about an organization, including a hyperlink to terms and conditions or any kind of online privacy statement or policy.

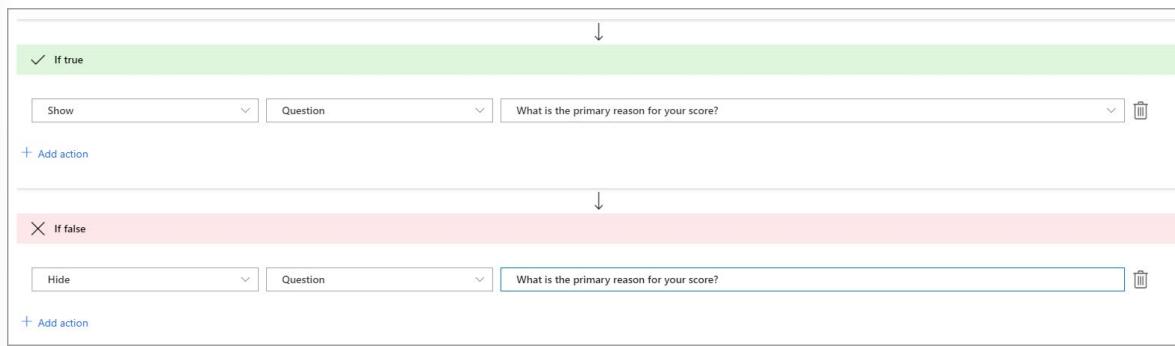
## Use branching rules in a survey

A survey can be created in Dynamics 365 Customer Voice with the intent of all questions being answered by a respondent. This approach might be acceptable for many surveys for an organization, but situations might occur where the need to guide the respondent in a specific direction is required. By using one or more branching rules, the flow of the survey can be customized to guide the individual to specific questions, hide a question, or even redirect the person directly to the end of a survey based on their responses to earlier questions. Branching rules are added to a survey from the **Design Customizations** menu.

Your first step is to give the branching rule a name. Use a logical name that would make sense to any person who might need to collaborate on the survey. Make sure that the name isn't vague; give it clear and concise descriptive keywords. Next, you will define the conditions. A condition begins with a survey variable or one of the questions from the survey, and it is then followed by an operator and then a response. For example, if question one is a rating question that uses smileys for the response, you can set a condition against it that runs if the response is less than two. Multiple conditions can be added to a rule, if necessary. For additional conditions in the rule, you can set the logic to one of two options: **AND** or **OR**.



Continuing through the branching rule, an action can be determined if the condition is met, or is true, and an action can be determined if the condition is not met or is false. A false action is optional, but a true option must be added to create the branching rule. An action contains the action itself, a target, and a value. For example, the action could be to show, the target can be a question, and the value is a specific question. In the previous condition, you can have an action to show a hidden question that asks the reason for the low rating.



The following figure shows other options for branching rule actions.

Type	Details	Usage
Action	Show	Used only with a question
Action	Hide	Used only with a question
Action	Navigate to	Used with multiple target options
Target	Question	Can be shown, hidden, or used to navigate to a specific question based on a response that was provided to a question specified in the condition.
Target	End of survey	Takes the respondent directly to the end of the survey, hiding all other questions, based on a response that was provided to a question specified in the condition.
Target	Chained survey	When this option is selected, all other surveys in an environment will be displayed as a list of values. The respondent can be directed to the chained survey on submission of the survey with the branching rule.
Target	URL	A URL can be provided to use as a redirect on completion of a survey. The respondent will then be taken to the URL after the <b>Submission</b> button has been selected on the survey with the branching rule.

The same options exist on both true and false actions. If a rule is used to show a question, a best practice would be to make the question hidden by default and then use a branching rule to **Show** if the condition is met and **Hide** if the condition is not met. Though the question might be hidden by default, if the respondent changes their answer during the process of completing the survey, without a false action, the question will not be hidden again. After a branching rule has been added, it's active immediately. Preview the survey to interact with it and make sure that the branching rule is working as intended. Too many

branching rules or rules that potentially contradict one another might occur, so thinking about and planning the rules carefully is recommended. By implementing rules, the survey can become more dynamic with a clear flow to get the most valuable data from any respondents who are completing it.

## Personalize a survey with variables

A significant part in the relationship between any organization and its customers is creating a personal experience to show that their needs are acknowledged and understood and that their satisfaction with a service or product is important. Gathering feedback by using Dynamics 365 Customer Voice can be as simple as sending a link to a generic form, but using variables provides the possibility of turning a detached experience into a fully customized and unique encounter for each person who responds to your surveys.

Variables are unique data that is linked to the respondent in some way. The simplest variables would be information such as the respondent's first name or last name. Variables can only be used when a survey is sent directly to a specified person rather than a link that is being shared on social media or on a website where any unknown person can complete the survey. Variables that are used on the survey are passed into the survey invitation in a unique link and are then returned through the related survey response and linked together. Up to 15 variables can be used on a survey.

Variables can be used in the following scenarios:

- Email invitations within templates
- Survey subtitles
- Survey questions
- Embedding surveys into websites
- Hidden variables to use for reporting and analysis

## Add variables

The **Variables** section can be accessed from the **Customization** menu on the right side of a survey. When a new survey is created, a few variables are added automatically. The **First Name** and **Last Name** variables are added and cannot be deleted from the survey. An additional variable exists for the locale of the survey, which can be deleted if it isn't required. When a Dynamics 365 Customer Voice survey is created, it uses the default language for its environment, but additional versions of the survey can be created by adding more languages. Using the locale variable provides a method in conjunction with Microsoft Power Automate to set the language of the survey that you are sending to a respondent.

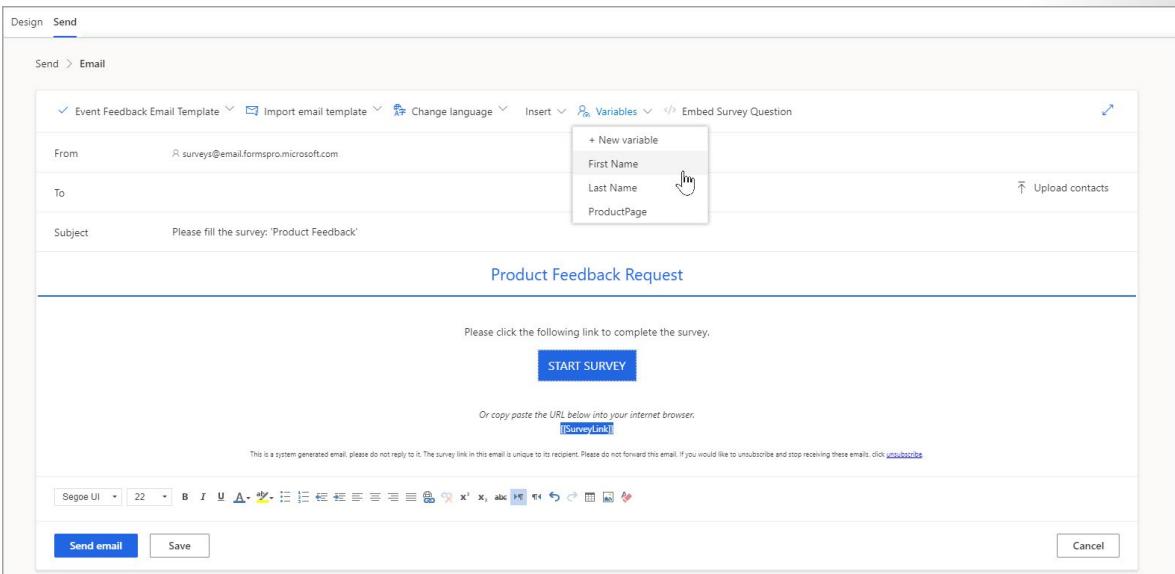
The screenshot shows the Microsoft Dynamics 365 Customer Voice survey editor. On the left, there's a preview of a survey titled "Case Resolution Survey". The survey starts with a greeting "Hello {{First Name}}" and a subtitle "Please provide us with some feedback on your recent support experience.". Below this, there are two questions. Question 1 asks "1. Overall, how happy were you with how your case was handled?" and provides a rating scale from sad to happy. Question 2 asks "2. Do you agree or disagree with the following statements:" followed by a Likert scale from "Strongly disagree" to "Strongly agree". On the right side, a "Variables" panel is open, showing three variables: "First Name" (with a "Default value" dropdown), "Last Name", and "locale". There's also a link to "Learn more" and a "+ Add variable" button.

Additional variables can be added by using the **Add variable** option. A variable must be given a name and can also be given a default value. The name will be visible wherever a variable can be added (email template, within the survey, or within Power Automate). The default value will be used as a contingency if data does not exist from the source of your data. For example, if you are using a SharePoint list or a Dynamics 365 Customer Service environment to store information about cases that are closed for your customers, you might want to add a variable for the case title, case number, and a way to indicate the source of the case. If the case source field is blank, using a default value of **Unknown** will mean that any case with that information missing will still have a value populated on the survey or email template where you have used the case source variable.

## Use variables

The added variables can be used in different places to pull in data from your data source. If the intent is not to use Power Automate, the only variables that can be used successfully are **First Name** and **Last Name**. This concept is discussed later in this learning path for Dynamics 365 Customer Voice, but capturing the fields to populate the variables must come from somewhere, and Dynamics 365 Customer Voice only knows of the **First Name** and **Last Name** variables. Selecting the main survey description will display a drop-down list of all variables that are available on the survey. When selecting the main title, you will notice that the variables are absent because they can't be used in that specific area of the survey. The variables can be added to questions on the main question text or on the question subtitle.

An email template can be personalized by selecting from the list of variables. These variables are then passed through when you send a survey invitation email. While all your variables can be used, keep the previous logic in mind where, if variables other than **First Name** and **Last Name** are to be used, Power Automate must also be used. In the following image, the **First Name** variable has been added to an email template. When the recipients are selected, the first name of each recipient will be used in place of {{First Name}}. Jane Doe will receive an email that starts with Hi Jane, while John Doe will receive an email that starts with Hi John.



## Add satisfaction metrics to a survey and project

When a new project is created, several items are added to the **Reports** section automatically. A report that contains survey responses is created for each survey that exists within the project. A **Satisfaction metrics** report is also created. Nothing will display on this report until satisfaction metrics have been added.

Satisfaction metrics exist on three different levels:

- **Survey response** - Each individual survey response holds the satisfaction metrics for that specific respondent.
- **Survey** - Each survey has satisfaction metrics added to it, and you can review these overall metrics from the **Satisfaction metrics** report by adding a filter and switching from one survey to another.
- **Project** - The default **Satisfaction metrics** report will show the results for all survey responses for all surveys within the project.

### Types of satisfaction metrics

Up to 10 metrics can be added to a project, giving an organization the ability to track the levels of satisfaction in a variety of ways.

Three types of metrics can be applied to different questions, as shown in the following figure.

Metric type	Details
NPS	A Net Promoter Score question can be added to a survey to track the overall satisfaction of a respondent by using a scale from zero to 10. A person who responds with a 0 to 6 is known as a Detractor, someone responding with a 7 or an 8 is Passive, and a respondent with a 9 or a 10 is a Promoter.

Metric type	Details
Sentiment	Sentiment is calculated based on the sentiment of a response that is provided to a text-based question. This metric is based on analysis of the words that are used and ends in a result of either Positive, Negative, or Neutral.
CSAT	Customer Satisfaction (CSAT) is an indicator of how satisfied a customer is based on a response given to a ratings question. This metric could indicate how satisfied a customer is with a product, service, or experience.

Satisfaction metrics can be accessed and edited from the Customization menu on a survey. If using a project that was created from a template, this may include one or more satisfaction metrics already mapped to questions. A survey maker can map a metric to a question, making sure to follow the question compatibility for each metric type as per the table above. The satisfaction metrics can be updated and remapped after survey responses have been collected, but they will only be calculated for new responses moving forward, and not applied retroactively to any of the previous responses.

The name of each of the metrics can be changed to make it more obvious what the metric is tracking. This is important for projects with multiple metrics of the same type. To add further explanation, a description can be added to each metric too.

Premium Support Survey

Design Send

Case Resolution Survey

Hello {{First Name}}

Please provide us with some feedback on your recent support experience.

1. Overall, how happy were you with how your case was handled?

:( :| :| :| :) :

2. Do you agree or disagree with the following statements:

	Strongly disagree	Somewhat Disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
The support rep was knowledgeable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The case was responded to in a timely manner	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The support technician was courteous and	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Satisfaction metrics

Use satisfaction metrics to track trends in collected data. Add up to 10 metrics per project.

Support - NPS Sentiment  
Sentiment

Support - CSAT  
CSAT

Name \*  
Support - CSAT

Add description ▾

Premium Support Survey questions \* ⓘ  
Overall, how happy were you with how your case was handled? ▾

Other questions using this metric ▾

Support - NPS  
Net Promoter Score®

Support - Team Sentiment  
Sentiment

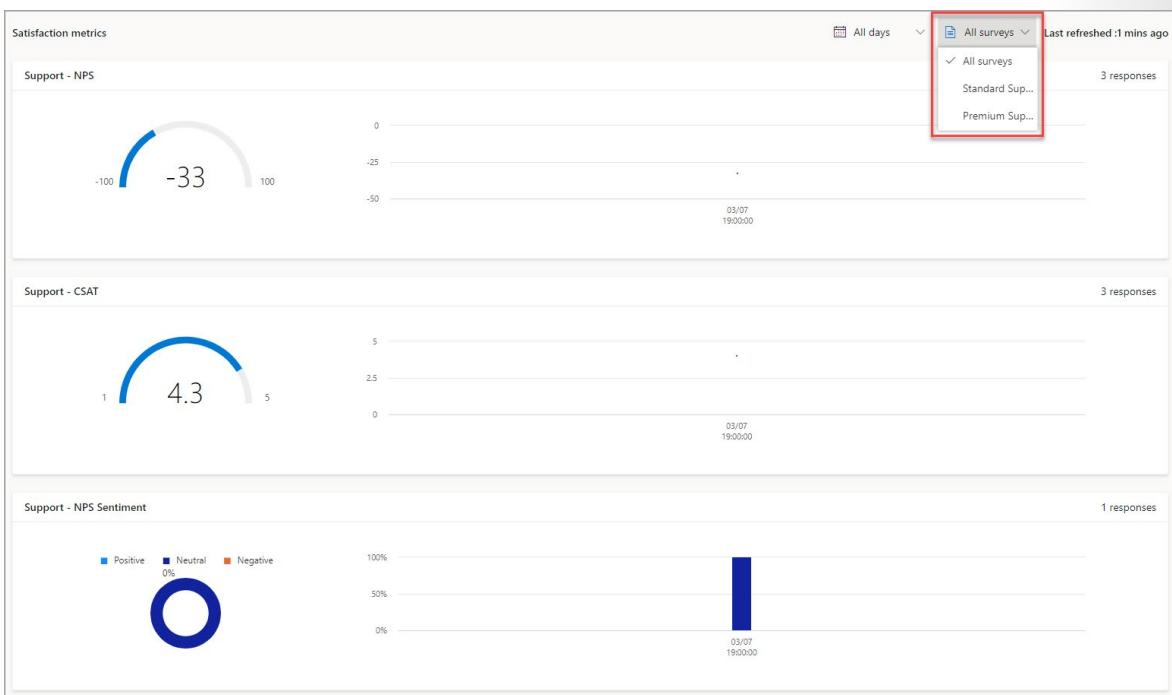
+ Add metric ▾

Save Cancel

If you are copying a survey, the satisfaction metrics will be copied along with all questions, branding, variables, and branching rules. However, you will need to review the metrics on the new survey that is being created and select the correct questions to use. The names of the metrics will be the same as what's shown on the original survey, as they are for the project overall. Changing the names on the new survey will result in the names being changed for all surveys that use them. It is also possible to see other questions that are using the same metric being pulled from other surveys.

The screenshot shows the Microsoft Dynamics 365 Customer Voice interface. On the left, there's a preview of a survey titled "Case Resolution Survey". The survey starts with "Hello {{First Name}}" and asks for feedback on support experience. Below the survey, a question is listed: "1. Overall, how happy were you with how your case was handled?" with a series of small circular icons below it. On the right, there's a panel titled "Satisfaction metrics" which includes sections for "Support - NPS Sentiment" and "Support - CSAT". The "Support - NPS Sentiment" section has a form field for "Name" with "Support - NPS Sentiment" entered, and a dropdown for "Standard Support Survey questions" containing "What is the primary reason for your score?". The "Support - CSAT" section is partially visible. A red box highlights the "Standard Support Survey questions" dropdown.

As survey responses are received, the satisfaction metrics can be reviewed from the **Reports** area on a project. By default, all surveys are shown, but you can filter this view by switching from one survey to another in the drop-down menu. Satisfaction metrics will also be displayed on the home page dashboard in Dynamics 365 Customer Voice. The satisfaction metrics for a specific response are stored in a **Satisfaction metric** value within the related Microsoft Dataverse environment. The data is stored in JSON, which can then be accessed by using Power Automate, with the values being used to generate actions as needed. Using Power Automate will be discussed in detail in another module of this learning path.



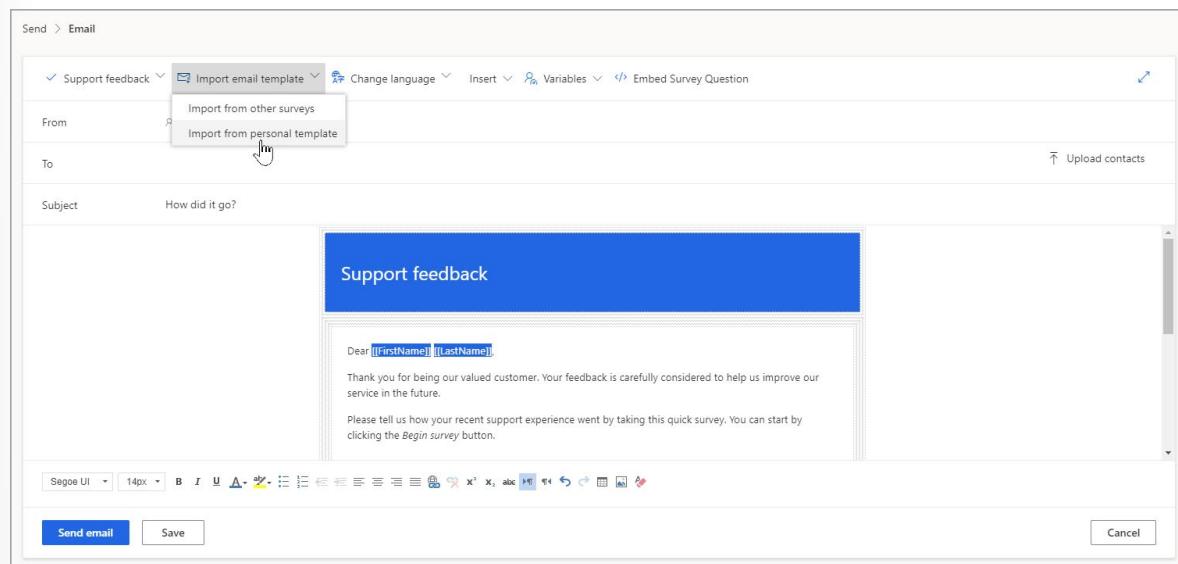
# Send Dynamics 365 Customer Voice surveys

## Introduction to sending surveys

Dynamics 365 Customer Voice includes email functionality, providing survey makers and marketers with the ability to send personalized email messages to an email address or recipient from Outlook, Dynamics 365, or by importing recipients from a CSV file. A survey could be customized with a corporate theme by using images, colors, fonts, and logos, providing brand recognition for the respondent who is completing the survey. However, if the received email doesn't show any kind of similar branding, a disconnect could appear between the email and the survey, which could result in the recipient ignoring the email or believing it to be spam.

To keep the experience consistent, you can customize email templates to fit in with the overall customer journey. Each email template is created and owned by a user, but it can be shared across other surveys. Templates can also be imported from other surveys, if necessary. The template can include images, changes to fonts, and the ability to add variables so you can create a personalized email template to send to recipients.

Different projects contain surveys with different standard email templates. Each template contains slightly different wording in the main body and has a different salutation, depending on the purpose of the template.



An email template consists of several components, some of which are required. Other components might improve the overall appearance and help make the email clear and concise. Consider the following elements when you are creating email templates.

Component	Required	Details
Subject	Yes	The survey invitation must have a subject; it is required on any email template that is created. As with any type of email, survey invitations with a subject are more likely to be responded to.

Component	Required	Details
Survey link	Yes	A link to the survey is required. This link can be in the form of a direct link, or it can be with an image and by using [[Survey-Link]] in the URL link. When the email invitation is sent, a personalized link is generated for each survey recipient to allow tracking of the survey responses that are received.
Unsubscribe link	Yes	The unsubscribe link must be included in the email template. This link allows the recipient of the email to unsubscribe from receiving more requests to take surveys that are sent from Dynamics 365 Customer Voice (based on the environment they are sent from).
Variables	No	Variables can be used to show personalized information such as first name or last name. These variables can be used when you are sending directly from Dynamics 365 Customer Voice. Other variables must be used in conjunction with a flow in Microsoft Power Automate to pull information such as company name, case title, and so on.
Logo	No	If an image has been added to the survey, it will be added to the top of the survey template by default. It can be removed if it's not required, but it can help with brand recognition.
Images	No	Images can be added to other areas of the email template and used in social media profile links, headers, or further brand recognition.

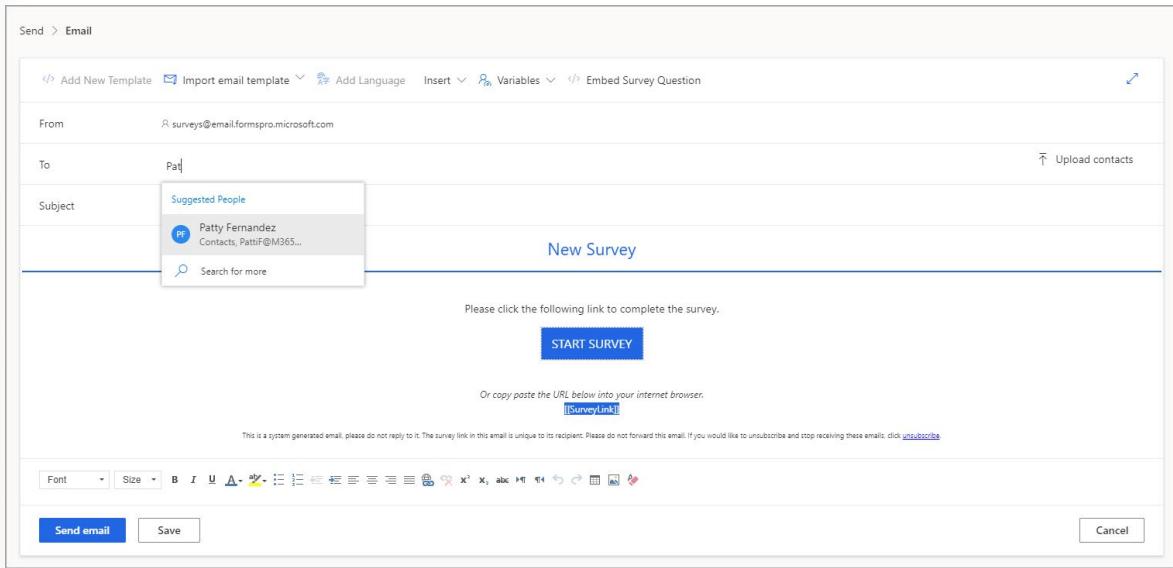
With some planning and modifications, a marketer can create a full library of email templates that are ready and available for a survey creator to select from. Keeping the branding consistent with the rest of an organization's methods of communication can help encourage a higher rate of survey responses and feedback.

## Email a survey

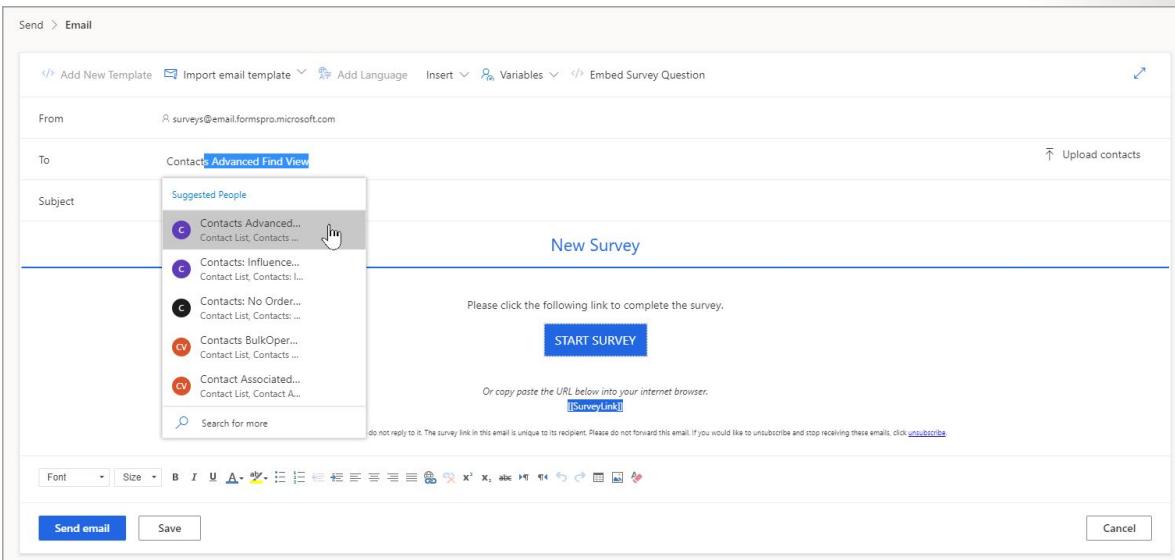
After a survey has been completed and branding has been added to a customized email template, it's time to start sending out the survey and asking for feedback. The action of sending a survey creates a survey invitation record, which is stored in Microsoft Dataverse. When the survey is responded to, it creates a survey response record that is also stored in Dataverse, which is linked to the survey invitation. This feature provides you with the ability to see which invitations have been responded to with a completed survey, which invitations have been started but not responded to, and which invitations haven't been opened.

Sending an email is done directly from the **Send** tab on a survey. By using the email option, you can review the email prior to sending it. Next, you would select a default or customized email template and then determine the recipients. Dynamics 365 Customer Voice has a direct integration with Outlook and Dynamics 365. You can enter an email address directly into the **To** field, followed by a semicolon. Though the email will be sent, using this method means that no personalization of the survey is possible because it's only the email address being used and the first name and last name are not provided. A setting on each survey also determines if any respondents, where the email address cannot be found in Dataverse, will be created as a contact record or not. By default, this setting is turned on but can be turned off so new contact records are not created.

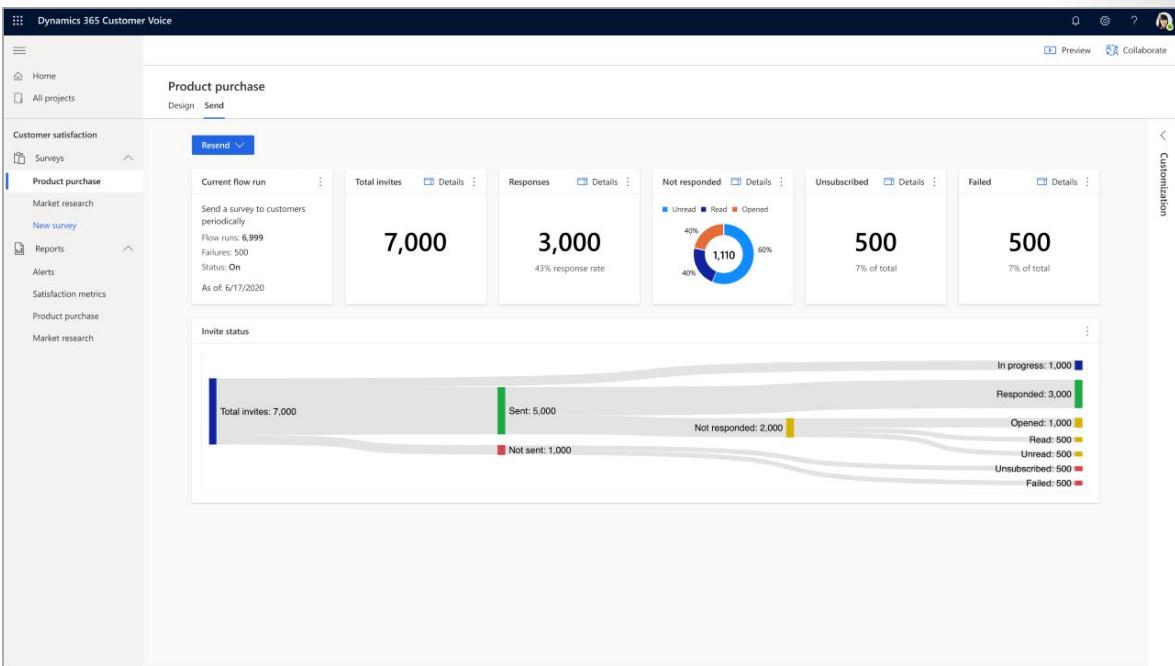
By typing the name of a person, or an email address where this information already exists in either Outlook or Dynamics 365, you will be presented with a list of suggested people who meet the value that was typed. When the required contact is displayed, you can select their name, which will add the contact into the **To** field. Multiple recipients can be added, and each person will receive their own individual email, without any indication of whom else the email was sent to.



Another option for Dynamics 365 customers is to search for and send a survey invitation to all contacts who are returned from a view. Views are created as system or personal views, either of which can be selected for sending. By typing the name of the view in the **To** field, a list of any views matching that criteria are displayed. The email can then be sent with a copy going to each person that meets the search criteria of the view that was selected.



After the survey has been sent once, the **Send** tab will then display a dashboard. The dashboard will provide you with access to resend the survey, and it will give an overview with widgets that display the total number of invites and responses for the survey. The dashboard will also show how many unsubscribes and failed invitations have occurred.



Selecting the **Details** option for the different widgets will open a recipients panel. For example, if you select the **Details** link on the **Failed** section, any email addresses that survey invitations could not be sent to will be displayed in a list. These entries can then be reviewed to ensure that they are valid email addresses. Sent emails are tracked, meaning that you will be able to monitor when recipients open the survey invitation and will be provided with an overview that is found on the **Not responded** widget. Selecting the **Details** option will provide more information. Though it isn't possible to guarantee that none of the emails will be blocked and marked as spam or junk mail, the emails do include reputation management, which reduces the likelihood of this situation from happening.

The possible survey invitation status values are shown in the following figure.

Status	Meaning
In Progress	The survey invitation email is queued to be sent.
Sent	The survey invitation email has been successfully delivered to the recipient.
Read	The survey invitation email has been read or opened.
Started	The survey has been started by the recipient but is not yet complete.
Responded	The recipient has responded to the survey.
Failed	The survey invitation email wasn't delivered to the recipient due to an incorrect email address or other error.
Unsubscribed	The recipient has unsubscribed from receiving the survey-related emails.

By default, surveys are sent from a generic email address for Dynamics 365 Customer Voice. However, the sender's email address can be customized to provide an organization with the ability to select an email address from their own domain. Customization helps with brand recognition and makes it more likely that respondents will review, open, and take action when receiving an email from an organization that they are familiar with. Information on how to customize the sender's email address can be found at [Customer Voice email details<sup>1</sup>](#).

A recipient can also unsubscribe from receiving further surveys that are sent from Dynamics 365 Customer Voice. A required link at the bottom of each email template provides recipients with the option to unsubscribe. After the recipient has unsubscribed, their email address is added to Dataverse to an environment's unsubscribe list. Any further surveys that are sent from the same environment will first be checked against the unsubscribed list and, if a matching email address is found, the recipient will be excluded from the email distribution.

## Upload CSV files

The ways to send out a survey invitation by email include sending an email to an Outlook contact, a Dynamics 365 contact, and sending an email to all contacts who are returned in a Dynamics 365 view. These methods are user-friendly and ideal to use when the contacts already exist. Consider the scenario of an organization, Contoso, that has hosted an industry event. During the two-day event, the sales team took time to gather names and email addresses of all who attended and added them to a spreadsheet. Now, it's time for the marketing team to request feedback.

The first step that the marketing team should take is to determine if these attendees should be added to the Microsoft Dataverse environment as contact records. By default, on each survey, a setting determines that all unknown email addresses that are sent a survey invitation will be created as a new contact record. If the email address is found as a match, the survey invitation record will be linked to that contact. This approach might not be appropriate for all circumstances, so this function can be turned off on a survey-by-survey basis. The setting for **Add respondents as Contacts** can be accessed from the **Send** tab and then the **Customization** menu. Select **Distribution settings > Respondent settings**, which will provide the switch to turn on or off this function, depending on the requirements for the survey.

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<sup>1</sup> <https://aka.ms/CustomerVoiceCustomEmail>

The screenshot shows the 'Support Survey' configuration page in Microsoft Dynamics 365 Customer Voice. The 'Send' tab is active. On the left, there are three main distribution options: 'Automate', 'Email', and 'Embed'. Below these, there are two additional options: 'Link' and 'QR Code'. On the right, the 'Distribution settings' section is expanded, showing various configuration options. One specific option, 'Add respondents as Contacts', is highlighted with a red box around its toggle switch.

To send the survey invitations to all email addresses that were captured by the sales team at the Contoso event, the marketing team needs to make sure that the spreadsheet that the sales team used is in the correct format for Dynamics 365 Customer Voice to read. The spreadsheet must be a CSV file and must meet the following criteria:

- The CSV file should contain the following comma-separated values for each contact in the sequence:
  - Email address (mandatory)
  - First Name
  - Last Name
- The first row in the file is assumed to be the header and it will not be imported.
- Only 10,000 recipients can be imported at once. If more than 10,000 recipients exist, split them into multiple CSV files before importing them.

In addition, it is possible to associate a survey invitation and response to an entity in the same Dataverse environment by adding the following columns and information to the CSV file:

- **RegardingID** - ID of the entity to associate with the survey invitation and response.
- **RegardingEntityName** - Name of the entity to associate with the survey invitation and response.

When the format is correct, the marketing team can import the information by going to the **Send** tab for a survey and selecting **Email**. The **Upload contacts** option is located to the right of the **To** field. After browsing for the file of records from the event, a team member can select and import the file. A list of the contents will be displayed, which the team can review prior to selecting the **Import recipients** button. An option is also provided to update the contact information if the imported recipient already exists as a contact in Dataverse, based on the email address. Because the import file only contains three fields of data for each record, only the **First Name** and **Last Name** fields could be updated. After the import is complete, the **To** field will show how many recipients will be emailed. After an email template is selected, it can be sent.

Upload contacts

Upload contacts using a .csv file in programs such as Excel.  
[Download a template here.](#)

Contacts

If using a .csv file:

1. Include email, first name, and last name separated by commas.

Email	First name	Last name

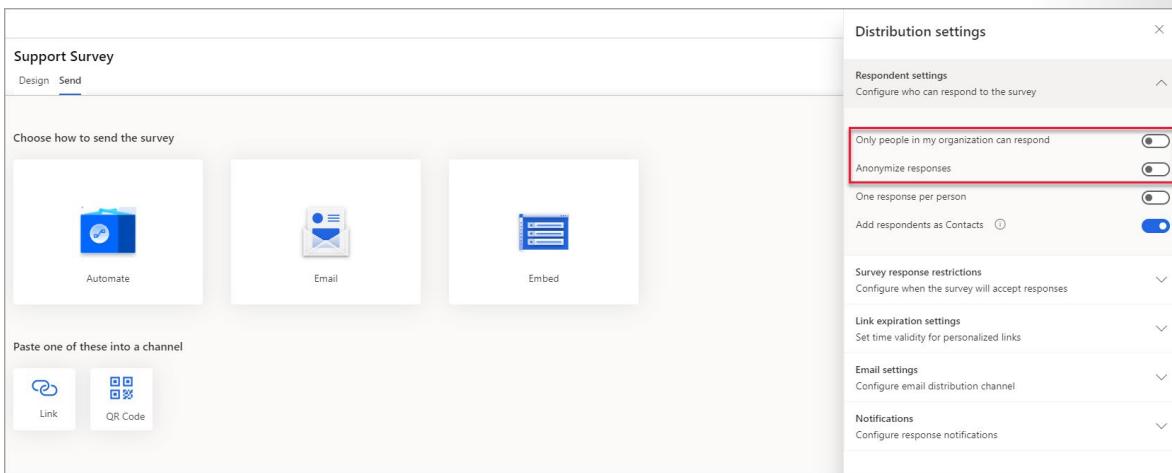
2. The first is assumed to be a header and won't be included.

3. Up to 10,000 contacts can be uploaded from one file. To add more, divide contacts into separate files of no more than 10,000 each.

## Use links and QR codes

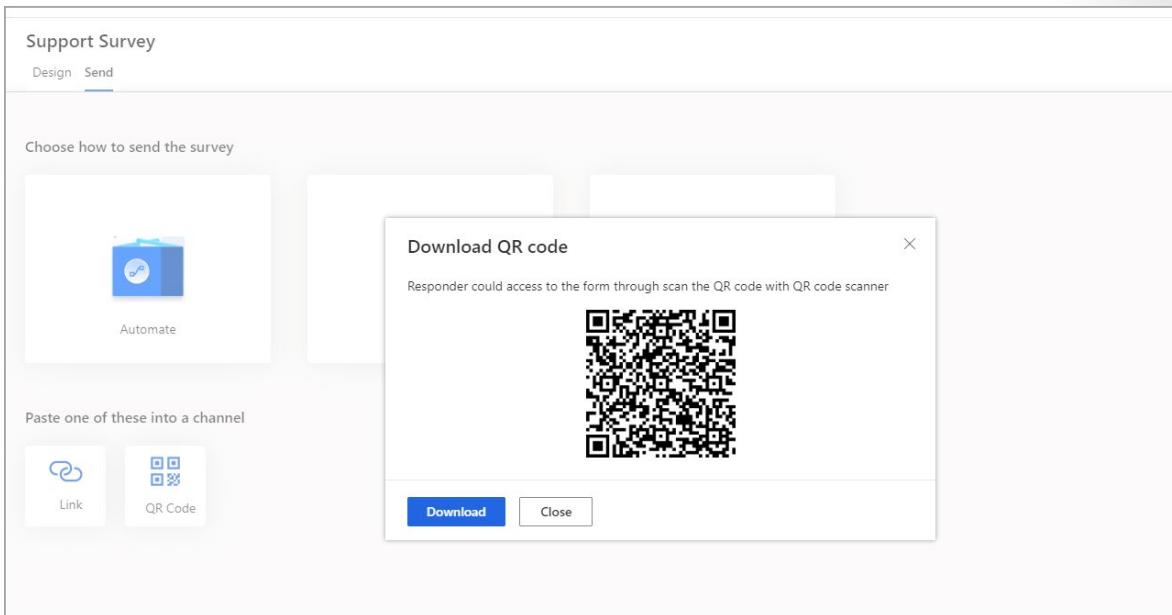
Sending an email to request feedback from a specified recipient is one way to get a Dynamics 365 Customer Voice survey out to people. Using email makes the survey respondent known, and the survey response is tied back to the original survey invitation. Surveys can also be shared with others who are anonymous by using a direct link or a QR code. Consider a situation when a survey is used to gather feedback about an event. The event has a corresponding group on a social media channel, and the organizers want to find out about what people thought of the various sessions and keynote speaker. Sharing the link directly means that the organizers can capture the name of each individual response. In this circumstance, adding a **First Name**, **Last Name**, and **Email** field to a survey would make sense so that organizers will know who provided the feedback.

The **Distribution settings** area of a survey provides information about who can fill in the form and submit a response. The **Only people in my organization can respond** option can be turned on or off, depending on whether you want to allow anyone with the link to the survey to respond. The **Anonymize responses** option can be turned on or off as well. If the setting is turned off, and the survey is also set to only allow people within the organization to respond, and the recipients are sent the link without it being shared in a personalized email from Dynamics 365 Customer Voice, their name can still be captured because they will need to be signed in to respond. If the link is shared and the setting is for anyone to respond, their name cannot be captured because no link is provided to a unique email address.



In the **Send** area of the survey, you can review all the ways to distribute the survey. The **Link** option provides the full URL to the survey, which can then be shared on social media or within an email. This link is a non-personalized survey link, and any variables that are added to the survey will not contain any kind of personalization for the respondents, so keep this aspect in mind when you are creating the survey.

Next to the **Link** option is the **QR Code** option. This option is provided as an image that can be downloaded by the survey maker in Dynamics 365 Customer Voice. The QR code is *snapped*, much like taking a photograph with a phone or tablet device. This action can be done directly with the camera on some phones or by using a QR code reader app on others. After the image has been captured, you can then select the link behind the QR code, which will take you directly to the Dynamics 365 Customer Voice survey to complete.



QR codes can be used in many different ways. Some of the following methods can be implemented by an organization that wants to take advantage of this functionality:

- Add a QR code to a job posting to assist with recruitment, allowing job seekers to fill out a form and apply for the job directly from their phone.

- If a company is running a contest or sweepstakes, adding a QR code to flyers or posters around a building, or to the bottom of receipts or invoices, helps make it easier for people to submit their entry.
- Using Dynamics 365 Customer Voice internally on an employee feedback survey gives members of the team the ability to provide suggestions and ideas directly to the Human Resources team.
- When a company hosts training, either internally or externally for clients, feedback is a must. Displaying a QR code at the end of the session helps make the students' ability to share their thoughts and evaluate the course and instructor quicker and easier.