

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

Course Description

This course teaches learners how to design, configure, and govern AI-enhanced sales solutions using Dynamics 365 Sales, Microsoft Copilot, and AI agent capabilities to support sellers across the lead-to-cash process. Learners translate business requirements into practical, AI-first seller workflows that improve productivity, forecasting accuracy, and decision-making while aligning with organizational revenue goals, governance standards, and responsible AI practices.

Course Duration

3 days

Prerequisites

Basic understanding of sales processes and CRM concepts, including leads, opportunities, accounts, and contacts. Familiarity with Microsoft Dynamics 365 Sales or similar CRM platforms

Course Outline

1 - Transform customer experiences with AI in Dynamics 365 apps

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

2 - Discover Dynamics 365 Sales as an AI-powered sales solution

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

3 - Set up and configure Dynamics 365 Sales

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

4 - Nurture and generate leads in Dynamics 365 Sales

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

5 - Qualify leads using the Sales Qualification Agent in Dynamics 365 Sales

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

6 - Engage with customers through text messages in Dynamics 365 Sales

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

7 - Set up the product catalog in Dynamics 365 Sales

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

8 - Manage opportunities and process sales orders in Dynamics 365 Sales

- Explore opportunities in Dynamics 365 Sales
- Manage the opportunity lifecycle
- Add products and configure pricing
- Use Copilot with opportunities
- Process quotes, orders, and invoices

9 - Close deals using AI agents in Dynamics 365 Sales

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

10 - Analyze sales performance using AI, forecasting, and dashboards in Dynamics 365 Sales

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

11 - Get started with the Dynamics 365 Sales mobile app

- Deploy the mobile app
- Use the mobile app
- Manage records
- Customize form views
- Set up push notifications

12 - Use Microsoft 365 services with model-driven apps and Microsoft Dataverse

- Set up mailboxes
- Server-side sync
- Document management options
- Document management
- Deploy the app for Outlook
- Set up Dynamics 365 App for Outlook
- Integrate with Microsoft Teams

13 - Extend Dynamics 365 apps with Power Platform and Copilot Studio

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

Who Should Attend

This course is designed for professionals who want to learn how to build AI-enhanced sales solutions using Dynamics 365 Sales, Microsoft Copilot, and AI agents. It is ideal for students who want to understand how modern sales teams use AI to manage leads, opportunities, forecasting, and seller productivity. Learners may have a general understanding of sales processes or Dynamics 365 but are looking to develop the skills needed to translate business requirements into practical, AI-powered sales workflows while following governance and responsible AI practices