GTech Learn

"Our focus is your Success"

Microsoft Learning Partner

Self-Paced Course

SalesCopilot-SP: Microsoft Sales Copilot

Duration: **6 Hours**	**Level**: **Intermediate**	**Role**: **Functional Consultant**
Certification: **Not-Available**	**Register:** Click Here	**Instructor-Led: NA**

What's included?

- ✓ Learn from Microsoft Certified Trainer (MCT's)
- ✓ Lifetime Access over Videos
- ✓ Exam Preps / Practice Tests
- ✓ Achievement Badges from Microsoft
- ✓ Completion Certificate
- ✓ Discounted Exam Vouchers

What do you get?

- ✓ Full HD Recorded Videos
- ✓ Lab Guides
- ✓ Embedded Quizzes
- ✓ Official Courseware from MS Learn
- ✓ Access From Anywhere
- ✓ Completion Certificate

Microsoft Solutions Partner

Business Applications

Training Services

Email: info@gtechlearn.com

Overview

Microsoft Sales Copilot is a seller experience application that uses Microsoft 365 and Microsoft Teams to automatically capture, access, and register data into any customer relationship management (CRM) system. It eliminates manual data entry and gives sellers more time to focus on selling. By enriching the data set with customer engagement data from Microsoft 365 and the power of AI, Sales Copilot empowers sellers with sales intelligence that helps them deeply understand their customers for faster deal closure. Sales Copilot is designed to help sellers boost productivity, lighten workloads, save time, and help salespeople sell more.

Audience Profile

Dynamics 365 Administrators, Sales Managers, End Users

Contents

Sales Copilot Setup

- Licensing Requirements
- Role requirements
- Sales Copilot Architecture
- Sales Copilot Configurations
- Setup Copilot in Dynamics 365 Sales
- Setup Copilot in Outlook Add-in
- Setup Copilot in Teams App

Sales Copilot Administration

- Overview
- Customize Forms and fields
- Integrate with Other applications
- Copilot with Microsoft 365 Apps

Using Sales Copilot for Outlook

- Connect a contact to your CRM
- Change the connected CRM contact
- Save Outlook activities to your CRM
- Edit a CRM record

Using Sales Copilot in Teams

- Use Sales Copilot app during a meeting
- Generate a meeting summary
- Create CRM tasks from meeting summary

AI in Sales Copilot

- Use Copilot to kickstart email messages
- View and save email summary to CRM

- View opportunity summary

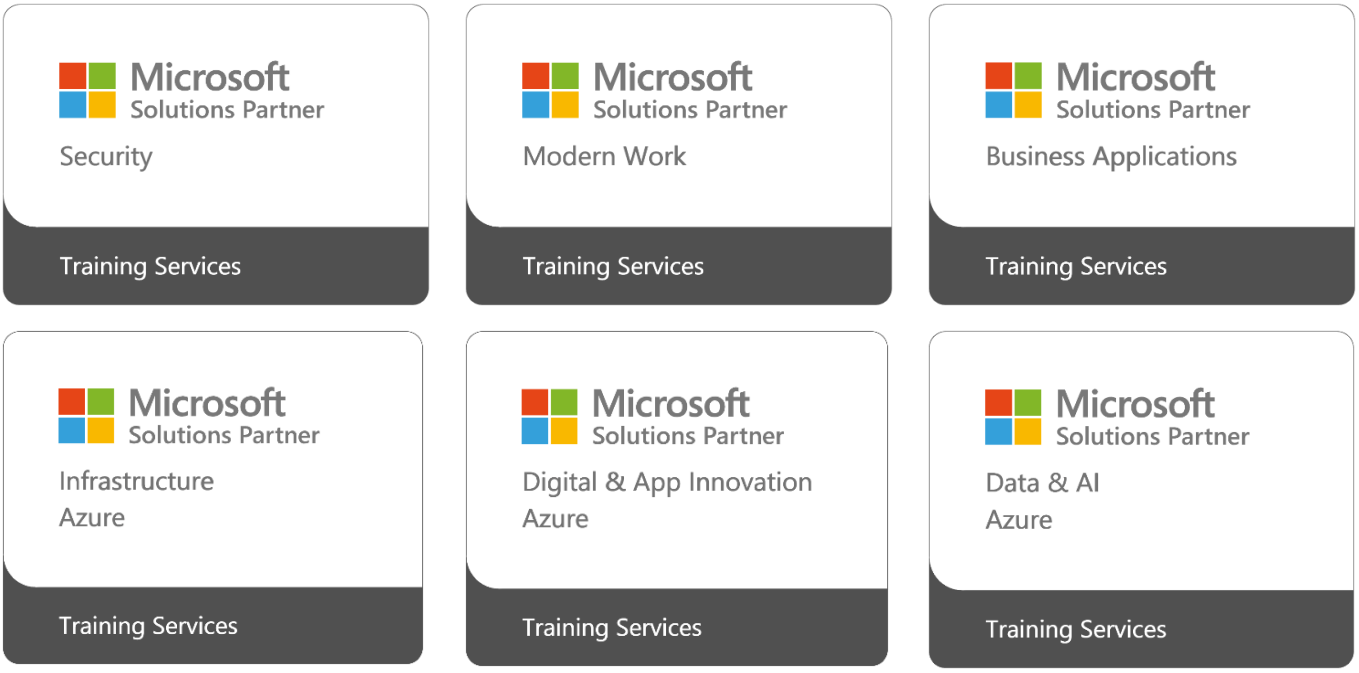
About GTech Learn

Established in 2011 in the USA, GTech Learn is one of the leading IT training organizations in North America & South East Asia. Driven by its unique USPs, GTech Learn is spurring competition, meeting the unmet needs of customers, assisting in skills upgrade, and supplementing talent pools with its presence in the USA, Canada, Singapore and India. This is consistent with our vision to help our Learners with skills upgrade for enhanced career opportunities.

As a Microsoft Learning Partner, we offer a broad range of learning solutions across the full Microsoft technology stack that can be customized.

Since 2011, GTech Learn has been developing custom-fit learning solutions that involve creating and delivering maximum results.

We have successfully helped all types of businesses, government entities, and individuals. For this reason, GTech has chosen by Microsoft to deliver comprehensive learning programs around the globe.

With flexible learning options, state-of-the-art delivery methods, numerous language preferences, experienced instructors, and complete dedication to our students, GTech Learn has the capabilities to help students develop their Microsoft skill sets and achieve increasingly high standards of productivity while organizations of all sizes realize the full potential of their technology investments.

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