



## Deploy & Configure Microsoft 365 CoPilot for Sales (MB-7007)

### COURSE OVERVIEW

This learning path helps identify features and functionality of Dynamics 365 Copilot for Sales, and how to set up and deploy the app.

### PREREQUISITES

A basic understanding of Dynamics 365 Sales or CRM applications.

### COURSE OBJECTIVES

- Use basic application capabilities in Outlook, Teams, and Word
- Use AI in sales communication, email, and meetings
- Use CRM data in your flow of work
- Create and use collaboration spaces within Teams
- Customize the application experience
- The high-level architecture involved with deployment of the application.
- Deployment to different clients for use in your organization.
- Tailoring Copilot for Sales to meet your organizational needs.
- Deployment of AI features.
- Configuration options in Microsoft 365 Apps.
- Ways to extend Copilot for Sales.

### COURSE OUTLINE

Boost Sales Performance with Microsoft 365 CoPilot for Sales

- View and update CRM data in the flow of work
- Use AI to supercharge sales communication
- Drive AI-powered sales meetings
- Use collaboration spaces for sales teams
- Customize Microsoft Copilot for Sales

Deploy & Configure Microsoft 365 CoPilot for Sales

- Copilot for Sales architecture
- Install Copilot for Sales in Outlook
- Customize forms and fields
- Turn on Copilot AI features
- Configure for Microsoft 365 Apps
- Extend Copilot for Sales

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