Microsoft Dynamics 365 Sales CRM Essentials

Course Overview

This three-day training course provides participants with a complete understanding of Microsoft Dynamics 365 Sales CRM. It focuses on managing the full sales cycle, from lead to invoice, and equips learners with both end-user and administrative skills to effectively manage and customize the CRM environment.

Through practical exercises, participants will learn to manage customer relationships, track opportunities, automate sales processes, and generate insights using reports and dashboards. The course blends business user operations with system administration essentials, helping organizations get the most out of their Dynamics 365 Sales platform.

By the end of the training, learners will be able to confidently navigate Dynamics 365, streamline sales workflows, and support business growth through data-driven insights and automation.

Prerequisites

• Basic understanding of sales or customer relationship management concepts

• Familiarity with Microsoft 365 tools such as Outlook and Teams

• (Recommended) Prior exposure to any CRM or business application

Course Content

Module 1: Business User Module

• Introduction to Microsoft Dynamics 365 Sales interface, module structure, and user roles

• Managing customer data: accounts, contacts, and relationships

• Understanding the sales opportunity cycle: Lead → Opportunity → Quote → Order → Invoice

• Managing daily activities: tasks, appointments, emails, and notes

• Tracking sales performance with dashboards and analytics

• Integrating Dynamics 365 with Outlook and Microsoft Teams for better collaboration

Module 2: Administrator Module

• Managing users, roles, teams, and security permissions

• Customizing forms, fields, views, and layouts to suit business needs

• Automating workflows and processes using Power Automate

• Configuring business rules and conditional logic

• Importing, exporting, and maintaining data quality in Dynamics 365

• Environment setup, system maintenance, and performance monitoring

Module 3: Practical Scenario and Evaluation

• Hands-on practice: executing a real-world sales scenario

• Coordinating between business user and admin roles

• Common configuration and operational challenges — and how to troubleshoot them

• End-of-course evaluation and discussion on best practices