

KOENIG SOLUTIONS • COURSE OUTLINE

Microsoft Dynamics 365 Sales CRM Essentials

Learn to manage the sales cycle and administer Microsoft Dynamics 365 Sales CRM, from leads to invoices.

3 Days

DURATION

3

MODULES

16

TOPICS

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.

WHO THIS COURSE IS FOR

Sales Executives

CRM Administrators

Business Analysts

System Administrators

Sales Managers

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

LEARNING OBJECTIVES

- Explain the Dynamics 365 Sales interface and user roles
- Manage customer data through accounts, contacts and relationships
- Track the sales cycle from lead to invoice
- Manage daily activities such as tasks, appointments and emails
- Interpret sales performance using dashboards and analytics
- Configure users, roles, teams and security permissions
- Customise forms, fields, views and layouts
- Automate workflows using Power Automate and business rules

3 Modules, 16 Topics

01

Business User Module

TOPICS

- 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

02

Administrator Module

TOPICS

- 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

03

Practical Scenario and Evaluation

TOPICS

- **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

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

FLEXIBLE DELIVERY

Learn the Way That Suits You

Classroom Training

Live Online Classes (ILO)

Fly-Me-A-Trainer (FMAT)

Flexi (Self-Paced)

1-on-1 Training

Ready to Get Started?

Talk to a learning advisor about schedules, group training and customised delivery.

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