

# Dynamics 365 - Opportunities Quick Guide

Last Modified on 18/11/2024 3:41 pm GMT

## Opportunities Quick Guide

1. the lead/opportunity doesn't already exist
2. Qualify the lead (if you haven't already)
3. Complete details of the opportunity, including Type and Probability
4. Enter a description of the Opportunity
5. Complete details in the top right (Under name & owner)
6. Navigate to the Product tab
7. Select a Price List
8. Save (This is important to view products in the point below)
9. Add Products
10. Leave existing button unselected to select Product from Price List, enable the button to write-in product manually. Note - If adding a manual product ensure you add your companies prefix. For e.g. SY Example Product. Prefixes are essential for future reporting.
11. Override Price
12. Search for Product in the Existing Products
13. Product field
14. Complete remaining fields
15. Save and Close
16. Click through the arrow on the right side of the product to view details
17. Double check fields and pricing
18. Make sure Term is correct, or if blank, complete the field
19. Save
20. Make sure the Total Contract Value is correct
21. Navigate back to Summary
22. Check stakeholders and add competitors
23. Complete Develop in the process bar
24. Next Stage
25. Complete Propose in the process bar
26. Select close as won or close as lost

[Dynamics 365 - Opportunities Quick Guide.pptx](#) 

### **Important Notes:**

### **Suggested Fields**

Dynamics includes a smart feature that suggests options for regularly completed fields. However, these suggestions must be confirmed before saving. Suggested options appear in blue. Review and confirm or discard these suggestions before saving the record.

---