

How to Create New Opportunity in Dynamics 365

What is an Opportunity in Dynamics 365?

Opportunities in Microsoft Dynamics 365 provide insight into potential upcoming sales and, when used in conjunction with the Sales Pipeline report can be used to forecast revenue by date, probability, and potential revenue.

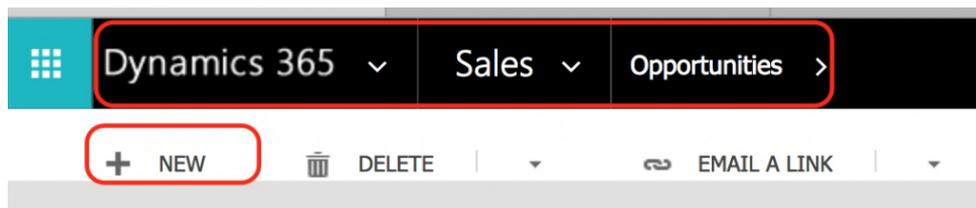
Opportunities are closely to quotes, orders, and invoices because they use the base information found on the originating opportunity when they are being created. In addition, opportunities are commonly created from leads and contain the base information from the originating lead.

Opportunities are created when “an opportunity” to make a sale is found for an existing customer. Although opportunities do *not* require the existence of a customer record, you can easily create a new account or contact record to associate with an opportunity if the customer is new. By doing this, however, you skip the step of creating leads and then converting them to customers and opportunities. This might be how your business works. Perhaps your sales cycle is very quick, and leads are not something that you cultivate. However, if you generally have potential customers, consider using leads to qualify them and then using opportunities to build potential sales around them.

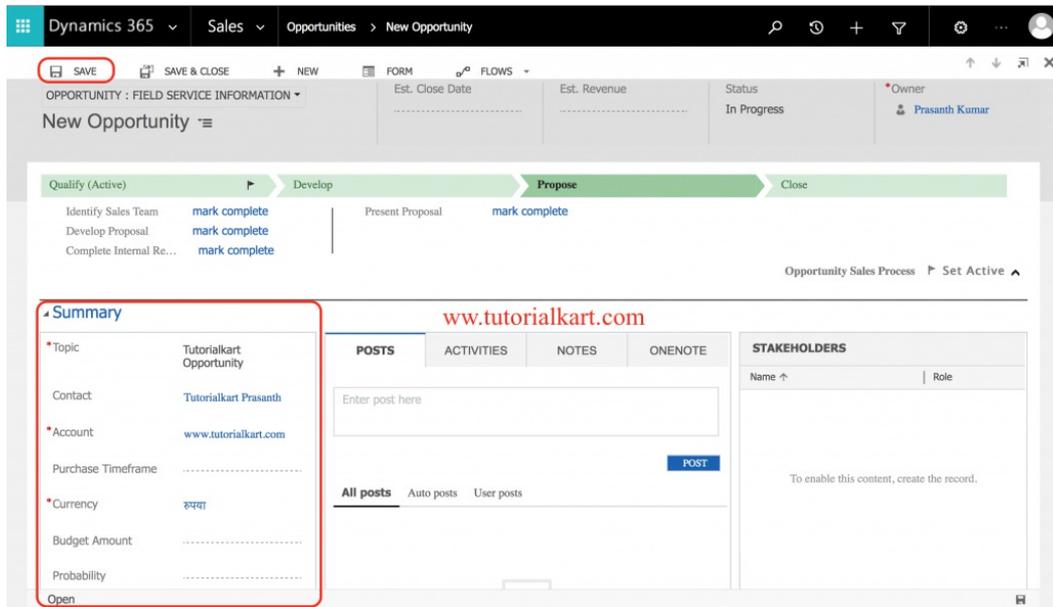
How to create new Opportunity in Dynamics 365.

To create new Opportunity in Microsoft Dynamics 365, navigate to [Dynamics 365 | Sales | Opportunities | New](#).

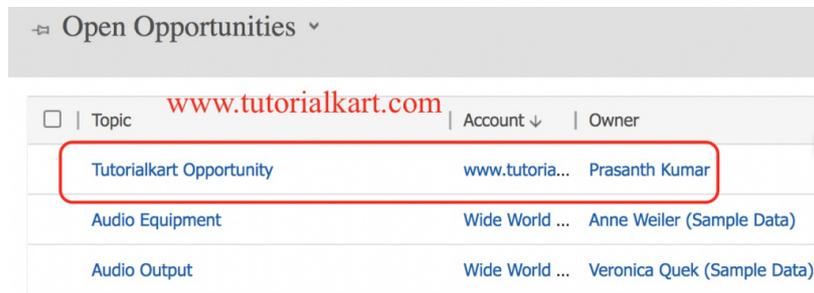
- Click on New to create opportunity.



When creating Opportunity in Microsoft Dynamics 365, Topic, Account and Currency fields are required.



- Click on Save button to Save Opportunity.



Conclusion

In this [Microsoft Dynamics 365](#) tutorial, we have learned how to **create new Opportunity in Dynamics 365** and in our next upcoming Dynamics 365 tutorial, we will learn how to add product to an opportunity.

Microsoft Dynamics 365 Basics

▸ What is Microsoft Dynamics 365?

▸ Microsoft Dynamics CRM Modules.

▸ Navigation and User Interface

▸ What is an Entity?

▸ What is Solution?

▸ What are Web Resources?

▸ What is a site map Designer?

Microsoft Dynamics 365 for Sales

▸ Dynamics 365 for Sales Basics

▸ How to create an Entity in Dynamics CRM?.

▸ Creating Entity Form in Dynamics CRM

▸ Different Sales Module Entities

▸ How to create a lead.

▸ How to create an opportunity?

▸ How to add a Lead Source?

▸ How to convert a lead to an Opportunity.

▸ Relationships in Dynamics CRM : 1:N, N:1, N:N

Microsoft Dynamics 365 for Service.

▸ Service Dashboards.

▸ Service Reports

Microsoft Dynamics 365 for Marketing.

▸ Marketing Module Entities

▸ Marketing Dashboards.

▸ Marketing Reports