



Dynamics 365 Sales – Year-End Cleanup Checklist

1. Pipeline Health Scan

- Identify opportunities with Close Date < Today
- Flag opportunities with no activity in the last 30–45 days
- Review deals stuck in the same stage too long
- Check for incomplete fields (budget, decision-maker, timeline)

2. Forecast Alignment

- Review Forecast Category for all active opportunities (Commit, Best Case, Upside, Push to Q1, Long-term)
- Adjust Estimated Close Dates
- Confirm Revenue, Probability, and Amount accuracy

3. Opportunity Reassignment

- Reassign opportunities from inactive users
- Reassign stalled opportunities
- Reassign by region, segment, or capacity

4. Activity Cleanup

- Close or delete old tasks
- Log missing calls/emails
- Close overdue follow-up activities
- Remove irrelevant activities

5. Duplicate Detection

- Run duplicate rules for Leads, Contacts, Accounts, Opportunities
- Merge duplicates
- Archive irrelevant records

6. Data Quality Review

- Ensure complete opportunity data fields
- Review missing fields via filtered views

7. Dashboard & Reporting Refresh

- Update Sales dashboards
- Refresh charts
- Validate views for new fiscal year

8. Year-End Sales Governance

- Close dead/stagnant opportunities
- Move realistic deals to Q1
- Clean old quotes, orders, leads
- Validate integrations

Your Sales Team Is Now Year-End-Ready!