

A Non-Developer's Guide to Smarter Sales Processes in Microsoft Dynamics CRM 2015

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Part 2: Revenue Estimation

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About This Presentation



- These are the slides from a live webcast on MSDynamicsWorld.com, presented on May 6th 2015
- The webcast recording is available on YouTube: <http://bit.ly/crm15salesprocess>
- The topics are covered in more detail in blog posts at <http://survivingcrm.com/>



About Me



- Dynamics CRM consultant from Helsinki
- Working at [Digital Illustrated Finland](#)
- Dynamics CRM addict since 2005
- Frequent blogger & #MSDYNCRM evangelist on social media
 - Blog: survivingcrm.com
 - [@jukkan](#) on Twitter
- Microsoft MVP since 2013
- Focused on improving CRM solution usability & information work efficiency



Jukka Niiranen

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Consultant @ Digital Illustrated
Microsoft Dynamics CRM MVP



Customizing Dynamics CRM as a Non-Developer



- Point & click configuration/customization tools of Dynamics CRM have come a long way
- The ratio of custom code vs. configuration in typical CRM solutions is decreasing
- Solution delivery often requires the creative *combination* of several CRM configuration options
- The goal of this article series is to demonstrate a few scenarios where such combinations are used for delivering new functionality for the CRM sales process



Customization Scenarios Explored in This Series

Part 2

1. Lead qualification

- Streamline data entry for leads on existing accounts & contacts
- Convert leads to influencers instead of new opportunities

2. Opportunity revenue estimation

- Replace opportunity product lines with predefined cost estimate fields
- Calculate opportunity total value from day & rate fields

3. Pipeline development

- Capture opportunity count and revenue per sales stage
- Schedule data snapshots of historical pipeline size

Opportunity Revenue Estimation





The Problem

- Calculating estimated revenue with CRM can require a lot of clicks from the end user
- Managing detailed product and price information in CRM product catalog and price lists can be troublesome
- Cannot easily have a standard set of opportunity product line items included in all opportunities
- Opportunity product editable grid cannot be customized to optimize data entry



Standard opportunity products grid

OPPORTUNITY ▾

CRM upgrade analysis

Est. Close Date
21.5.2015

Est. Revenue
24 800,00€

✓ Qualify	▶ Develop (Active)	▶ Propose	▶ Close
Customer Need	click to enter	Identify Competitors	mark complete
Proposed Solution	click to enter		
Identify Stakeholders	mark complete		

Product Line Items

Price List CRM Service USA (sample)
Revenue System Calculated



Product Name	Properties	Unit	Price Per Unit	Quantity	Discount	Extended Amount	Sug	Existing Product
Consulting			1 000,00€	20,0000	0,00€	20 000,00€		Write-in Product
CRM Online: Standard (san	✓ Edit	Standard Use...	40,00€	20,0000	0,00€	800,00€		
CRM Online: Professional (✓ Edit	Standard Use...	80,00€	50,0000	0,00€	4 000,00€		

Users must add every line item manually

Product pricing cannot be overridden in grid

No ability to disable Write-in Products

Detail Amount 24 800,00€
(-) Discount (%) --
(-) Discount --
Pre-Freight Amount 24 800,00€
(+) Freight Amount --
(+) Total Tax 0,00€



The Solution

- Create fixed fields for recording the revenue components directly onto the opportunity entity, with no line items
- Use CRM 2015 Calculated Fields feature to sum up the estimated revenue across all the individual fields
- Use a Real-time workflow to update the Est. Revenue field for the opportunity



Example Revenue Components for Projects



- Consulting
 - Hours (decimal), Rate per hour (currency)
 - Total = Hours * Rate (currency)
- Licenses
 - Users (whole), Months (whole), Rate per month (currency)
 - Total = Users * Months * Rate (currency)
- Other
 - Other costs (currency)
- Total Amount
 - Total = Consulting total + Licenses total + Other (currency)

Adding Custom Fields for Opportunity

Opportunity
Fields

Solution Solution 1

Information
Components
Entities
Account
Contact
Lead
Opportunity
Forms
Views
Charts
Fields
1:N Relationships
N:1 Relationships
N:N Relationshi...
Messages
Business Rules
Hierarchy Setti...
Process Stage
Snapshot
Option Sets
Client Extensions
Web Resources
Processes
Plug-in Assemblies
Sdk Message Processin...
Service Endpoints
Dashboards
Reports
Connection Roles

View: Custom

New	X	Edit	More Actions	
✓	Name ↑	Display Name	Type	Field Type
	jukkan_consultinghours	Consulting Hours	Decimal Number	Simple
	jukkan_consultingrate	Consulting Rate	Currency	Simple
	jukkan_consultingrate_base	Consulting Rate (Base)	Currency	Simple
✓	jukkan_consultingtotal	Consulting Total	Currency	Calculated
	jukkan_consultingtotal_base	Consulting Total (Base)	Currency	Calculated
	jukkan_licensesmonths	Licenses Months	Whole Number	Simple
	jukkan_licensesrate	Licenses Rate	Currency	Simple
	jukkan_licensesrate_base	Licenses Rate (Base)	Currency	Simple
✓	jukkan_licensestotal	Licenses Total	Currency	Calculated
	jukkan_licensestotal_base	Licenses Total (Base)	Currency	Calculated
	jukkan_licensesusers	Licenses Users	Whole Number	Simple
	jukkan_othercosts	Other Costs	Currency	Simple
	jukkan_othercosts_base	Other Costs (Base)	Currency	Simple
	jukkan_processstageid	Process Stage	Lookup	Simple
✓	jukkan_total	Total	Currency	Calculated
	jukkan_total_base	Total (Base)	Currency	Calculated

Simple fields =
standard CRM
data types

Calculated fields
= new CRM 2015
field type



Configuring the Calculated Field Formula

Type

Data Type *	Currency	▼
Field Type *	Calculated	▼ Edit
Precision *	Currency Precision	
Minimum Value *	-922 337 203 685 477,0000	
Maximum Value *	922 337 203 685 477,0000	
IME Mode *	auto	▼

In field definition window, click Edit

CALCULATED FIELD

Set Licenses Total

IF...THEN

CONDITION (OPTIONAL)

If **Licenses Users** contains data
and **Licenses Months** contains data
and **Licenses Rate** contains data

+ Add condition

Determine conditions for when to perform the calculation

ACTION

Set Licenses Total (currency)

= (jukkan_licensesusers * jukkan_licensesmonths) * jukkan_li

jukkan_licensesmonths (whole number)	Licenses Months
jukkan_licensesrate (currency)	Licenses Rate
jukkan_licensesusers (whole number)	Licenses Users

+ Add Else

Build calculation formula by picking the fields via "Intellisense"



Custom Opportunity Form for Project Sales

Save

Save As

Save and Close

Publish

Save

Change Properties

Remove

Undo

Redo

Edit

Header

Footer

Body

Navigation

Select

Business Rules

Form Properties

Preview

Form

Enable Security Roles

Show Dependencies

Managed Properties

Merge Forms

Upgrade

Project

Summary

Product Line Items

Quotes

Common

Documents

Activities

Documents

Connections

Audit History

Sales

Service

Marketing

Processes

Solution: Solution 1

Form: Opportunity

Summary

Opportunity Information

Topic*

Topic

Contact

Contact

Account

Account

Purchase Timeframe

Purchase Timeframe

Currency*

Currency

Budget Amount

Budget Amount

Purchase Process

Purchase Process

Process Stage

Process Stage

Description

Description

Opportunity Details

Spacer

Current Situation

Current Situation

Consulting

Hours

Consulting Hours

Rate (per h)

Consulting Rate

Total

Consulting Total

Licenses

Users

Licenses Users

Months

Licenses Months

Monthly Rate (per User)

Licenses Rate

Licenses Total

Licenses Total

Other

Other Costs

Other Costs

Total

Total Amount

Total

SOCIAL BANE

STAKEHOLDERS

COMPETITORS

Consulting revenue

License revenue

Other revenue

Total revenue



Calculated Fields on the Opportunity Form

+ NEW | CLOSE AS WON | CLOSE AS LOST | RECALCULATE OPPORTUN... | ASSIGN | EMAIL A LINK | DELETE | ...

OPPORTUNITY : PROJECT ▾

CRM upgrade analysis

Est. Close Date
21.5.2015

Est. Revenue
--

Rating
Warm

Owner*
Jukka Niiranen

Qualify	Develop (Active)	Propose	Close	Next Stage
Customer Need	Identify Competitors			
Proposed Solution				
Identify Stakeholders				

Summary

Topic* CRM upgrade analysis
Contact --
Account Blue Yonder Airlines (sample)
Purchase Timeframe --
Currency* euro
Budget Amount --
Purchase Process --
Process Stage --
Description --
Current Situation --
Customer Need --

Consulting

Hours 40,00
Rate (per h) 145,00€
Total 5 800,00€

Licenses

Users 50
Months 12
Monthly Rate (per User) 51,00€
Licenses Total 30 600,00€

Other

Other Costs 10 000,00€

Total

Total Amount 46 400,00€

...But the standard Est. Revenue field still remains blank

Now we have a Total fields that get calculated on record save



Setting the Est. Revenue field value (1)

BUSINESS RULE: Opportunity

Cost estimate to Est. Revenue

Click to add description

IF...THEN

CONDITION

If **Total** is greater than 0

+ Add condition

ACTION

Set field value

Field

Est. Revenue

Type

Field

Field

Actual Revenue (Base)

Other Costs (Base)

Other Costs

Probability

Total Amount (Base)

Total Amount

Total Detail Amount (Base)

Total Detail Amount

+ Add action

+ Add Else

- Business Rules won't work for updating the Est. Revenue field
- You can't set a standard field's value to the value of a calculated field



Setting the Est. Revenue field value (2)

Process: Cost estimate to Est. Revenue

Information

General Administration Notes

▼ Hide Process Properties

Process Name *

Activate As

Available to Run

☐ Run this workflow

☐ As an on-demand process

☐ As a child process

Options for Automation

Scope

Start when:

Execute as:

Add Step ▼

Select this row and click Add Step.

Select Fields

Select the fields that the process will monitor for changes.

<input type="checkbox"/>	Display Name	Name ▲	Type
<input type="checkbox"/>	Revenue	isrevenuesystemcalculated	Two Options
<input checked="" type="checkbox"/>	Consulting Hours	jukkan_consultinghours	Decimal Number
<input checked="" type="checkbox"/>	Consulting Rate	jukkan_consultingrate	Currency
<input type="checkbox"/>	Consulting Rate (Base)	jukkan_consultingrate_base	Currency
<input checked="" type="checkbox"/>	Licenses Months	jukkan_licensesmonths	Whole Number
<input checked="" type="checkbox"/>	Licenses Rate	jukkan_licensesrate	Currency
<input type="checkbox"/>	Licenses Rate (Base)	jukkan_licensesrate_base	Currency
<input checked="" type="checkbox"/>	Licenses Users	jukkan_licensesusers	Whole Number
<input checked="" type="checkbox"/>	Other Costs	jukkan_othercosts	Currency
<input type="checkbox"/>	Other Costs (Base)	jukkan_othercosts_base	Currency
<input type="checkbox"/>	Process Stage	jukkan_processstageid	Lookup

OK Cancel

- Real-time workflows can, however, access the calculated field's value
- Trigger the workflow on record create event and source field value change event
- Set Est. Revenue to total cost

▼ Check that opportunity is open and cost estimate total field has a value

If Opportunity:Status equals [Open] AND Opportunity:Total > [0,00], then:

- Copy the calculated value from the cost estimate total field to Est. Revenue field

Update: Opportunity [View properties](#)

Est. Revenue

{Total(Opportunity)}



Est. Revenue Synchronized with Calculated Total Field



+ NEW | CLOSE AS WON | CLOSE AS LOST | RECALCULATE OPPORTUN... | ASSIGN | EMAIL A LINK | DELETE | ...

OPPORTUNITY : PROJECT ▾

CRM upgrade analysis

Est. Close Date
21.5.2015

Est. Revenue
47 850,00€

Rating
Warm

Owner*
Jukka Niira



Summary

Topic* CRM upgrade analysis

Contact --

Account [Blue Yonder Airlines \(sample\)](#)

Purchase Timeframe --

Currency* [euro](#)

Budget Amount --

Purchase Process --

Process Stage [2-Develop](#)

Description --

Consulting

Hours 50,00

Rate (per h) 145,00€

Total 7 250,00€

Licenses

Users 50

Months 12

Monthly Rate (per User) 51,00€

Licenses Total 30 600,00€

Other

Other Costs 10 000,00€

Total

Total Amount 47 850,00€

Now the Est. Revenue field will automatically reflect the value from the calculated Total field

Current Situation
--

Customer Need
--

SALES TEAM

Name ↑ | Role

No sales team members found.

Final Notes





Next Steps

- Read more articles on Microsoft Dynamics CRM customization best practices at <http://survivingcrm.com/>
- Follow [@jukkan](#) on Twitter for the latest #MSDynCRM related news and tips
- Check out the Dynamics CRM webcasts series at <http://msdynamicsworld.com/webcasts>
- Thanks for viewing these slides & enjoy customizing your Dynamics CRM environment!