

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

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/>



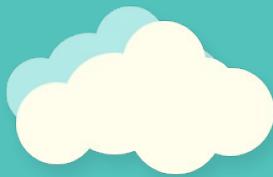
About Me

- 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



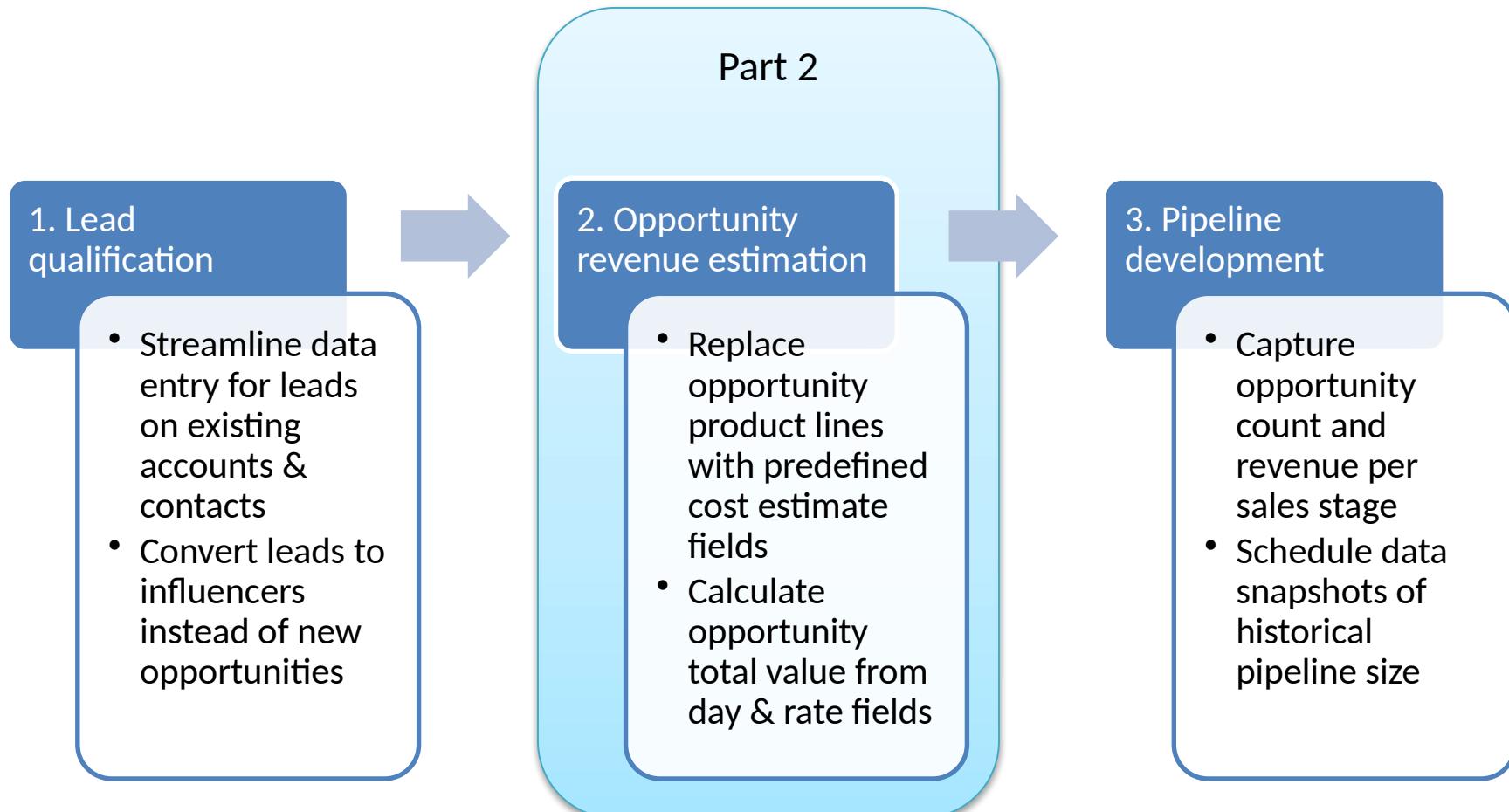
Customizing Dynamics CRM as a Non-Developer



- 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



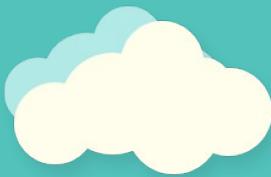
Opportunity Revenue Estimation





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€



Users must add
every line item
manually

Product Line Items

Price List CRM Service USA (sample)

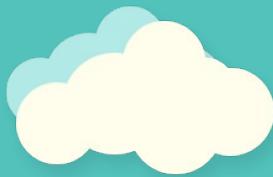
Revenue System Calculated

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

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€



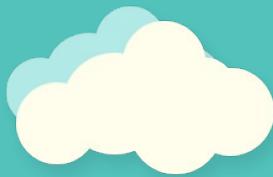
The Solution

- 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)
 - $\text{Total} = \text{Hours} * \text{Rate}$ (currency)
- Licenses
 - Users (whole), Months (whole), Rate per month (currency)
 - $\text{Total} = \text{Users} * \text{Months} * \text{Rate}$ (currency)
- Other
 - Other costs (currency)
- Total Amount
 - $\text{Total} = \text{Consulting total} + \text{Licenses total} + \text{Other}$ (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 Relationships
Messages
Business Rules
Hierarchy Settings
Process Stage
Snapshot
Option Sets
Client Extensions
Web Resources
Processes
Plug-in Assemblies
Sdk Message Processing...
Service Endpoints
Dashboards
Reports
Connection Roles

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

Build calculation formula
by picking the fields via
"Intellisense"

jukkan_licensesmonths (whole number)

Licenses Months

jukkan_licensesrate (currency)

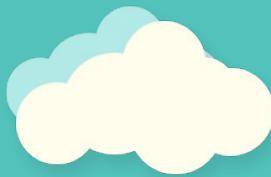
Licenses Rate

jukkan_licensesusers (whole number)

Licenses Users

+

Add Else



Custom Opportunity Form for Project Sales

Save As
Save and Close
Publish
Save
Change Properties
Remove
Undo
Redo
Body
Header
Footer
Navigation
Business Rules
Form Properties
Preview
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

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
--------------	-------

Consulting revenue

License revenue

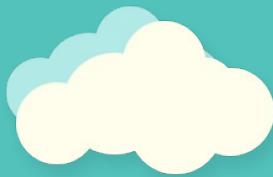
Other revenue

Total revenue

SOCIAL PANE

STAKEHOLDERS

COMPETITORS



Calculated Fields on the Opportunity Form

Microsoft Dynamics CRM | SALES | Opportunities | CRM upgrade analy... | Create | Enter Search Item | Jukka Niiranen | Org 2 | ?

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

CRM upgrade analysis

OPPORTUNITY : PROJECT

CRM upgrade analysis

Qualify → Develop (Active) → Propose → Close → Next Stage

Customer Need: click to enter
Proposed Solution: click to enter
Identify Stakeholders: mark complete

Identify Competitors: mark complete

Est. Close Date: 21.5.2015
Est. Revenue: --
Rating: Warm
Owner: Jukka Niiranen

Summary

Topic *	CRM upgrade analysis	Consulting
Contact	--	Hours: 40,00
Account	Blue Yonder Airlines (sample)	Rate (per h): 145,00€
Purchase Timeframe	--	Total: 5 800,00€
Currency *	euro	Licenses
Budget Amount	--	Users: 50
Purchase Pro		Months: 12
Process Sta		Monthly Rate (per U): 51,00€
Description		Licenses Total: 30 600,00€
Current Situ		Other
Customer Need		Other Costs: 10 000,00€
Total Amount		Total
		Total Amount: 46 400,00€

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

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

SALES TEAM

Name	Role
No sales team members found.	



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

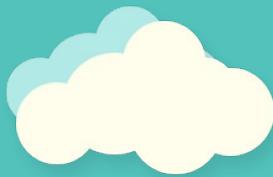
Set field value

Field	Type	Field
Est. Revenue	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

Common

- Information
- Audit History
- Scheduled Processes

Process Sessions

- Process Sessions

General Administration Notes

Hide Process Properties

Process Name *

Activate As

Available to Run

- Run this workflow
- As an on-demand
- 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

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

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

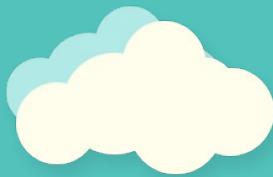
- Copy the calculated value from the cost estimate total field to Est. Revenue field

Update: Opportunity [View properties](#)

Est. Revenue

{Total(Opportunity)}

- 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



Est. Revenue Synchronized with Calculated Total Field

Microsoft Dynamics CRM | SALES | Opportunities | CRM upgrade analy... | Create | Enter Search Item | Jukka Niiranen | Org 2 | ?

+ 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 Niiranen

Qualify → Develop (Active) → Propose → Close ← → Next Stage

Customer Need: click to enter | Proposed Solution: click to enter | Identify Stakeholders: mark complete

Identify Competitors: mark complete

Summary

Topic *	CRM upgrade analysis	Consulting
Contact	--	Hours: 50,00
Account	Blue Yonder Airlines (sample)	Rate (per h): 145,00€
Purchase Timeframe	--	Total: 7 250,00€
Currency *	euro	
Budget Amount	--	
Purchase Process	--	
Process Stage	2-Develop	Licenses
Description	--	Users: 50
		Months: 12
		Monthly Rate (per U): 51,00€
		Licenses Total: 30 600,00€
Current Situation	--	Other
Customer Need	--	Other Costs: 10 000,00€
		Total
		Total Amount: 47 850,00€

SALES TEAM

Name ↑	Role
No sales team members found.	

Open

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

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!