

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



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Microsoft Dynamics CRM MVP



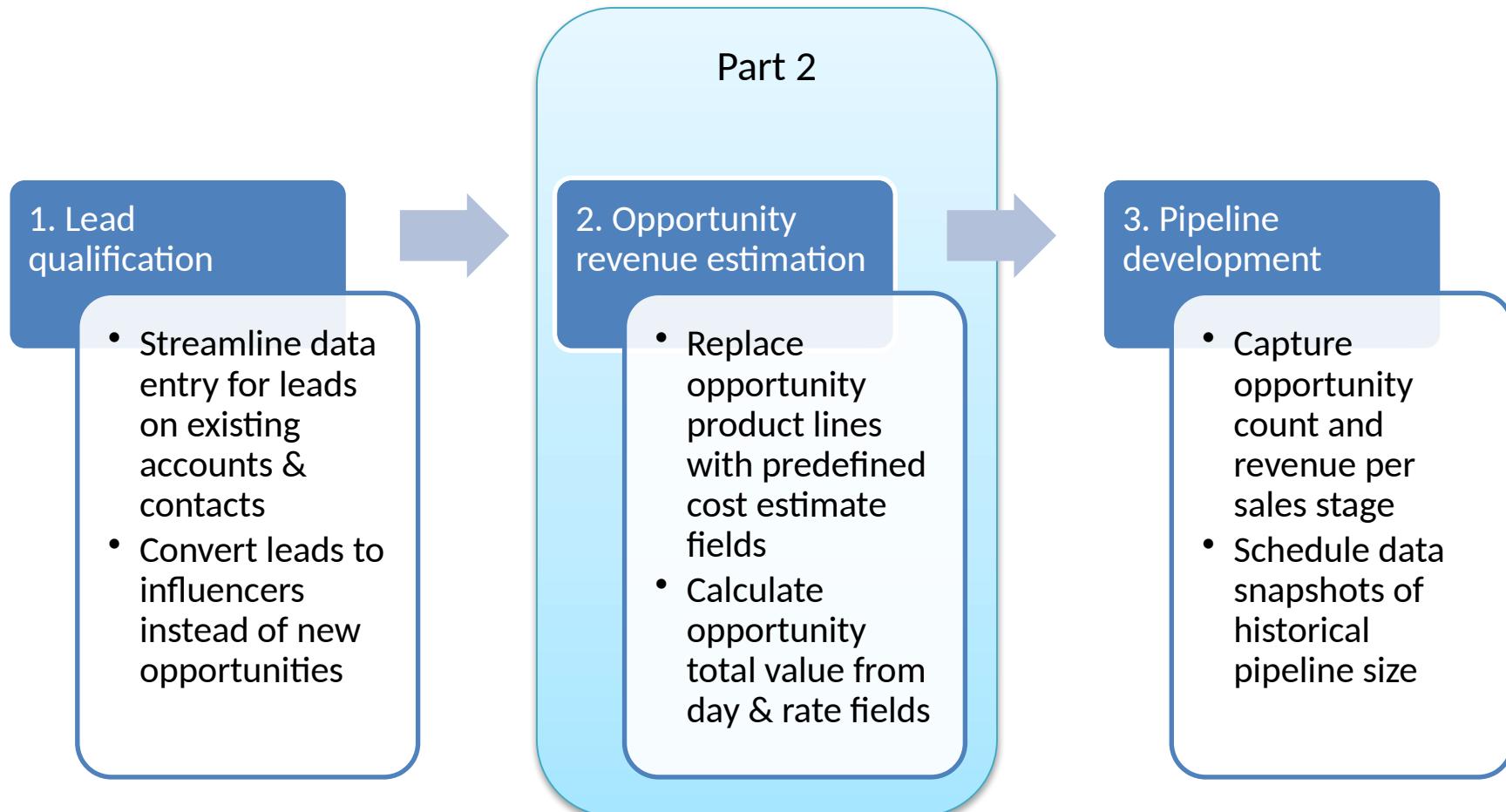
Customizing Dynamics CRM as a Non-Developer



- 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 | <input checked="" type="checkbox"/> Edit | Standard Use... | 40,00€ | 20,0000l | 0,00€ | 800,00€ | | | |
| CRM Online: Professional (| <input checked="" type="checkbox"/> Edit | Standard Use... | 80,00€ | 50,0000l | 0,00€ | 4 000,00€ | | | |

Product pricing
cannot be
overridden in grid

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

No ability to
disable Write-in
Products



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 | 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 |
|---------------------------|-------------|------------|----------|-------|-------|--------|--------|-------------------|-------------------|-------------------|----------|----------------|--------------------|---------------|----------|-------------|-------------------|---------------|-----------|--------------------|---------------------------|-------------------|------------|---------|------------------|
| Opportunity | | | | | | | | | | | | | | | | | | | | | | | | | |
| 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 | 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_consultingttotal | Consulting Total | Currency | Calculated |
| jukkan_consultingttotal_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_licensesstotal | Licenses Total | Currency | Calculated |
| jukkan_licensesstotal_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

In field definition window, click Edit

Precision *

Currency Precision

Minimum Value *

-922 337 203 685 477,0000

Maximum Value *

922 337 203 685 477,0000

IME Mode *

auto

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)

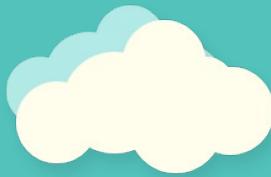
Licenses Rate

jukkan_licensesusers (whole number)

Licenses Users

+

Add Else



Custom Opportunity Form for Project Sales

Save As Save and Close Change Properties Remove Undo Redo Body Header Footer Navigation Business Rules Form Properties Preview Show Dependencies Managed Properties Merge Forms Upgrade

Save Save Publish Save Edit Select Form

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 |

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

STAKEHOLDERS

COMPETITORS

The screenshot shows a custom opportunity form for project sales. The interface includes a ribbon bar with various tools like Save, Undo, and Business Rules. On the left, there's a sidebar with categories like Project, Common, Sales, Service, Marketing, and Processes. The main area displays the 'Opportunity' form under 'Solution: Solution 1'. The form is divided into several sections: 'Opportunity Information', 'Consulting', 'Licenses', 'Other', and 'Total'. Callout bubbles point from the right side to specific sections: 'Consulting revenue' points to the Consulting section, 'License revenue' points to the Licenses section, 'Other revenue' points to the Other section, and 'Total revenue' points to the Total section. The Consulting section contains fields for Hours, Rate (per h), and Total. The Licenses section contains fields for Users, Months, Monthly Rate (per User), and Total. The Other section contains a field for Other Costs. The Total section contains a field for Total Amount.



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 ...

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 click to enter
Proposed Solution click to enter
Identify Stakeholders mark complete

Identify Competitors mark complete

Summary

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

Consulting

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

Licenses

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

Other

| | |
|-------------|------------|
| Other Costs | 10 000,00€ |
|-------------|------------|

Total

| | |
|--------------|------------|
| Total Amount | 46 400,00€ |
|--------------|------------|

SALES TEAM

| Name ↑ | Role |
|------------------------------|------|
| No sales team members found. | |

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

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



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.

| | 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!