Lab 1: Create and Disqualify a Lead

Scenario

You work at Contoso as a sales representative and receive a phone call from Teresa Atkinson, a potential customer interested in a new product line. In order to follow the company's guidelines for lead tracking, Teresa now needs a Lead record created in Microsoft Dynamics CRM. Later, you receive an Email from a sales person regarding Teresa Atkinson stating she was no longer interested in the new product line that will be available this later this year.

Objectives

- During this Lab you will create a new Lead record for Teresa Atkinson from a View in Microsoft Dynamics CRM.
- Once the lead has been created, you will disqualify the lead record.

Step by Step

1. On the **Navigation bar**, click **Sales**, and click **Leads**.
2. On the **Control bar**, click **New**.
3. In the **Lead** form, enter appropriate information and observe any noted restrictions or requirements as needed:
    - **Topic**: New Product Line
    - **First Name**: Teresa
    - **Last Name**: Atkinson
    - **Company Name**: Adventure Works (sample)
    - **Job Title**: Salesperson
    - **Rating:** Warm
4. On the **Control Bar**, click **Save**.
5. In the **Process Ribbon**, click the lookup button next to **Existing Account** to see if there is already an account created for *Adventure Works (sample)*.
6. If there is, already an account for *Adventure Works (sample)*, select the account.
7. In the **Process Ribbon**, click the lookup button next to **Existing Contact** to see if there is already a contact created for *Teresa Atkinson*.
8. In the **Process Ribbon**, in the **Qualify** stage, click **Purchase Timeframe**, select *This Quarter*.
9. In the **process ribbon**, in the **Qualify** stage, click **Identify Decision Maker**.
10. Click **Ctrl+S** to save the record.

11. In the **Collaboration Pane**, click **Activities**.
12. Click **Add Phone Call**.
13. Click **Direction** to change the phone call to incoming.
14. Click **You must enter a description** and enter, "Teresa called and changed her mind."
15. Click **OK**.
16. On the **Control Bar**, click **Disqualify** and select **No Longer Interested**. The lead record selected is now disqualified.

Review

Using leads within Microsoft Dynamics CRM allows organizations to clearly separate companies with whom they have little or no prior relationship from those companies that they do have an established relationship with. It is important to remember that the goal of tracking leads within the application is not to accumulate a long list of names. Having a long list of names that are never followed up with provides little to no value. The goal of lead management should be to continuously cultivate a list of prospective customers and through the process of meeting and talking with them determine their viability to be a customer. This lesson focused on the creation, management, and the process used to determine their viability. Additionally, this lesson introduced how competitors and sales literature can potentially be used to supplement the use of the sales module for Microsoft Dynamics CRM users.

Lab 2: Managing Opportunities

Scenario

You are a sales person for Contoso, you receive a phone call from an existing customer interested in a potential sale of an existing product. The customer describes the product to you by comparing it to a competitor's product line.

Objectives

In this lab the student is to complete the following:

17. Create an Opportunity and tie it to an existing customer.
18. Create a Competitor.
19. Associate a Competitor to the Opportunity.
20. Mark the opportunity as lost and associate with the competitor.
21. Reopen the opportunity.
22. Mark the Opportunity as won.

Step by Step

Create an Opportunity tied to an existing customer:

23. In the **Navigation Bar**, click **Sales**, and click **Opportunities**.
24. On the **Control Bar**, click **Create** and select **Opportunity.**
25. **Topic**: Existing product line.
26. **Contact**: Allan Jackson.
27. **Account**: Fabrikam, Inc.
28. **Budget Amount**: 7,000
29. **Est. Revenue:** 5,500
30. **Est. Close Date:** 3/3/2014
31. Click **Save.**

Create a Competitor and Associate it to the opportunity:

32. On the **Navigation Bar**, click **Sales**, and then click **Opportunities.**
33. Double-click on **Existing product line** in the opportunities list.
34. On the right side of the form click the **Add Competitor** icon.
35. Click the look up button and select **New**.
36. The Competitor dialog box appears:
    a. Name: Thomas Andersen
37. Click **Save.**

Mark the opportunity as lost and associate with the competitor:

38. On the **Navigation Bar**, click **Sales**, and then click **Opportunities.**
39. Double-click on **existing product line** in the opportunities list.
40. In the **Control Bar** select **CLOSE AS LOST.**
41. The **Close Opportunity** dialog box appears.
    - Status Reason: Out-Sold
    - Actual Revenue: 5,500
    - Close Date: today's date
    - Competitor: Thomas Andersen
42. Click **OK.**

Reopen the opportunity

43. On the **Navigation Bar**, click **Sales**, and then click **Opportunities.**
44. From the opportunities view select the **Lost Opportunities** view.
45. Open the **Existing product line** opportunity.
46. In the **Control Bar** select **REOPEN OPPORTUNITY.**

Mark the Opportunity as won.

47. From the **Existing product line** opportunity form click **CLOSE AS WON** in the **Control Bar.**
48. The Close Opportunity dialog box appears:
    - Status Reason: Won
    - Actual Revenue: 5,500
    - Close Date: Today's date
49. Click **OK.**

Lesson Review

In Microsoft Dynamics CRM, qualified leads, such as those that have estimated revenue associated with them, become opportunities. When the prospect or customer expresses qualified interest in buying the business' products or services, they are considered an opportunity.

This is an important part of the sales process because this is where the sales team spends most of its time and effort. The process of working on an opportunity may include several customer interactions. How well the sales team manages this stage can mean the difference between a win and a loss.

Every organization considers qualified prospects differently. The difference between a lead and a customer/opportunity pair must be studied when planning an implementation. Often, there is a sensible line in the sales process-such as handing off contact information from marketing to sales-that is clearly a qualification process.

Many sales organizations start their process from the opportunity stage rather than the lead stage. Sales people spend the majority of their time working on the opportunity and use Microsoft Dynamics CRM to track customer communications and tasks relevant to converting the opportunity to a sale. Almost all sales processes use opportunities to track potential revenue and calculate sales forecasts. This lesson focused on how to utilize the Microsoft Dynamics CRM opportunity functionality as well as how to utilize other related records such as activities, connections, and competitors.

Lab 3: Create a Special Offer Price List

Scenario

Allan Jackson is the marketing manager for Adventure Works, and wants to create a special offer price list for an upcoming product launch of the MB-500 series bikes.

Objectives

During this lab, you will create a price list and add products to the price list at a discounted price.

Step by Step

Perform the following steps to create the special offer price list.

50. In the **Navigation Bar**, click **Settings**, and then click **Product Catalog**.
51. On the product catalog page, click **Price Lists**.
52. On the **Price Lists** tab, in the **Records** group, click **New**.
53. Type "**MB-500 Launch Special**" in the **Name** field and click **Save**.
54. Click **Price List Items** in the left navigation area and click **Add New Price List Item** on the **Price List Items** tab.
55. Click the **Lookup** button on the **Product** field, and select the "Mountain Bike 500 Series - Black**"** product.
56. Click the lookup button on the **Unit** field and select "**Each**".
57. In the **Pricing Method** drop-down list, select **Percent of List**.
58. In the **Percentage** field type **80**.
59. In the **Rounding Policy** field select **None**.
60. Click **Save & Close**.
61. Repeat steps 5-11 to add the "**500 Series Mountain Bike - White**" product at the same discount level.
62. On the **Command Bar**, click **Save** and **Close**.

Lab 4: Use a Special Offer Price List for an Opportunity

Scenario

Allan Jackson is the marketing manager for Adventure Works, and has created a special offer price list for a marketing campaign. Before rolling it out to the sales team, you want to verify how it works. So, after creating the price list and adding some products to it, you will create an opportunity record and compare its pricing with both the standard and the special offer price lists.

Objectives

During this lab, you will create an opportunity record and apply the special offer price list to the opportunity. You will also verify that the special offer discount of 80% of the retail price has been applied to the opportunity.

Step by Step

Exercise Scenario

Perform the following steps to create the opportunity record based on the special offer price list.

63. In the **Navigation Bar**, click **Sales**, and click **Opportunities**.
64. On the **Opportunities** tab, click **New**.
65. Type "Test" in the **Topic** field.
66. Click the lookup button on the **Potential Customer** field and select **Adventure Works Cycles** from the list.
67. Click **Line Items** in left navigation, and use the lookup button to select the "**MB-500 Launch Special**" price list in the **Price List** field.
68. Click **Save** on the **Opportunity** tab.
69. Click **Line Items** in left navigation, and click inside the section.
70. On the **Opportunity Products** tab, in the **Records** group, click **Add New Opportunity Product.**
71. Use the Existing Product lookup button to select the "Mountain Bike 500 Series - Black"" product.
72. Use the lookup button on the **Unit** field and select **Each**.
73. Click in the **Quantity** field and type 100.
74. Click **Save & Close.**
75. Repeat steps 8-12 to add 100 **"Mountain Bike 500 Series - White"** products to the opportunity. .
76. Click the **Opportunity** tab, and then click **Recalculate Opportunity**.

Lab 5: Manage Product Catalog

Scenario

Allan Jackson is the Sales Manager for Adventure Works Cycle and is responsible for adding new sales products to Microsoft Dynamics CRM when they are ready to go on the market.

Objectives

During this lab you will complete the following tasks:

- Create Currency
- Create a Unit Group tied to the Currency
- Create a Product
- Create a Price List and Price List item tied to the Currency

Step by Step

Exercise Scenario

77. In the Navigation Bar, click **Settings** and click **Business Management**.
78. On the Business Management home page, select **Currencies**.
79. In the **Actions** toolbar, click **New**.
80. In the **Currency Code** box, click the Lookup icon to search for the code. In the list of currencies that are displayed, select the currency and click **OK**. .
81. In the **Currency** dialog box, the Currency Code, Currency Name, Currency Precision, and Currency Symbol are populated based on the selection.
82. In **Exchange Rate**, type an exchange rate for this currency converting values to the base currency. For example:
    - Base Currency = U.S. dollars
    - New Currency = Euros
    - Currency Code = EUR
    - Currency Name = Euro
    - Currency Code = €
    - Exchange Rate = 0.70730 (Note: from Euros to U.S. dollars)
83. Click **Save and Close.**

Perform the following steps to create a unit group:

84. In the left navigation area, click **Settings**, and then click **Product Catalog**.

85. On the **Product Catalog** page, click **Unit Groups**.
86. On the **Unit Groups** tab, in the **Records** group, click **New**.
87. In the **Create Unit Group** dialog box, enter:
88. **Name:** A descriptive name for the unit group.
89. **Primary Unit:** The primary unit for this unit group.
90. Click **OK**.
91. The new unit group is created and the form opens. In the form's navigation pane, under **Common**, click **Units**.
92. In the form's left navigation, in the **Common** section, click **Units**.
93. On the **List Tools Units** tab, in the **Records** group, click **Add New Unit**.
94. In the **Unit** form, define a unit in which the product is packaged by entering the following information:
    - **Name:** Case
    - **Quantity:** 10
    - **Base Unit:** Primary Unit
95. On the **Unit** tab, in the **Save** group, click **Save and Close**.

Perform the following steps to add products to the Microsoft Dynamics CRM product catalog:

96. In the **Navigation Bar,** click **Settings**, and **Product Catalog**.
97. On the Product Catalog page, click **Products,** then click **New** in the **Records** group on the **Products** tab.
98. In the **General** section, enter information for the following required fields, and information for other fields as appropriate:
    - **ID:** BIKE003
    - **Name:** MB 503 Bicycle
    - **Unit Group:** Default Unit.
    - **Default Unit:** Primary Unit
99. In the **Costs** section, the most important fields are:
    - **List Price**: $375
    - **Decimals Supported**: 2
    - **Standard Cost**: 325.
    - **Current Cost:** 315
100. When finished entering product information click **Save & Close**.

Follow these steps to create a new price list:

101. In the **Navigation Bar**, click **Settings** and then click Product Catalog.
102. On the Product Catalog home page, click **Price Lists**.

103. On the **Actions** toolbar, click **New**.

104. In the Price List form, enter:
   - **Name**: Default.
   - **Start Date**: 12/25/2013
   - **End Date**: 3/20/2014
   - **Currency**: US Dollar

105. Click **Save**.

106. In the form's **Navigation Bar**, under **Common**, click **Price List Items**.

107. On the Actions toolbar, click **Add New Price List Item**.

108. In the **Price List** Item dialog box, enter the following information:
   - **Product**: MB 503 Bicycle.
   - **Unit**: Primary Unit.
   - **Currency**: US Dollar
   - **Quantity Selling Option**: Whole
   - **Pricing Method**: Currency Amount
   - **Amount**: 275

109. Click **Save & Close**.

Lesson Review

This lesson explains how to create and maintain product catalogs, and the many benefits organizations can realize from doing so. It defines unit groups, price lists, and products. It also discusses how different price lists can be used for different types of customers. This lesson also shows how price lists can be used in the sales process, including demonstrations of special offer price lists and the use of price lists to create custom quotes for customers.

Lab 6: Opportunity, Quote, Order to Invoice

Scenario

The Sales representative had previously created an opportunity titled Bulk Bike Sale. The customer would like a quote before continuing with the sales order process.

Objectives

In this lab, you will complete the following:

110. Convert an Opportunity into a Quote.
111. Update the line item on the Quote.
112. Activate the Quote.
113. Revise the Quote.
114. Convert the Quote to an Order.
115. Convert the Order to an Invoice.
116. Review Resolution Activities.

Step by Step

Perform the following steps to compete this lab:

117. In the **Navigation Bar,** click **Sales** then select **Opportunities.**
118. Locate and open the "Bulk Bike Sale" record.
119. Locate the quote section on the form and click **Add Quote Record.**
120. The Quote record is created for Bulk Bike Sale**.**
121. Locate the **Products** section on the form and subtract $10 to the price per unit.
122. Click **Save**
123. On the **Control Bar** click **Activate Quote.**
124. On the **Control Bar** click **Create Order.**
125. The **Create Order** dialog box appears.
126. Select **Won** for a status reason.
127. Click **OK.**
128. From the order form click **Create Invoice** on the **Control Bar.**

Lesson Review

Different organizations have different processes and needs as it relates to what and how they approach and manage the sales life-cycle of their customers. Moreover, not all transactions start at the same point. Sometimes the entire sales process might take days or weeks and in other cases it might take multiple months. Within Microsoft Dynamics CRM, this means that some transactions might start as a lead and work their way from opportunities, to quotes, to orders to invoices. Others, will simply start at a sales order. Microsoft Dynamics CRM provides a flexible framework for organizations to design a solution that fulfills their customer relationship management strategies.