

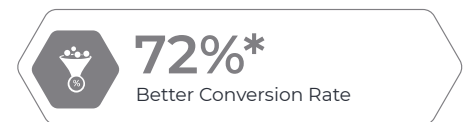
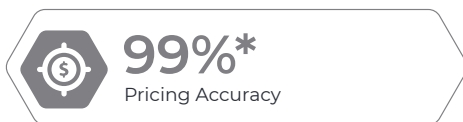
Dynamics Pricing Assistant (DPA)

Make sound pricing decisions

For any business, setting appropriate discounts for products / services and preparing successful sales quote are major challenges. Ensuring that customers are offered adequate discounts at quote-level, without compromising on profit margin, is the key to business profitability. Every sales rep has to operate within the stipulated discount margins authorized. However, in an effort to improve business and strengthen long-term relationships with customers, they have to go beyond their authorized discount limits while quoting prices to customers (i.e. determine different sales price and discount agreements that apply when selling to different customers). This process usually takes a while, which may result in a loss of business due to delays.

Developed as an add-on to Microsoft Dynamics 365 for Sales, DPA helps companies setup discounts and prepare the best sales quote that can be offered for a deal. It works out the margins on different products / services, and a set of business rules provide the framework for arriving at the best sales quote based on the rules and authorization levels. Rules are directly linked to the margin levels. If a sales rep needs an approval for a special price (beyond what the rules allow him/her), he / she can trigger a workflow requesting the appropriate authority for approval.

DPA not only helps the sales team procure faster approvals on discounts, but also enables management get insights on price margin analysis.



High-level Functionalities

Global settings

DPA allows the user to define the discount type in two ways: percentage discount and flat discount. Furthermore, it allows the user define the number of approval levels for the applied discount type and its values. The global level discount is applied overall, on all of the products / services.

Pricing extension

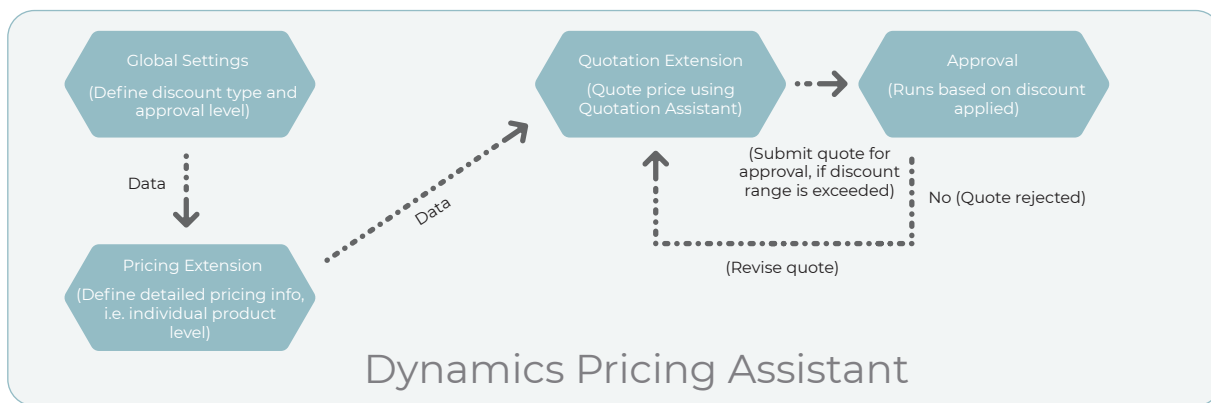
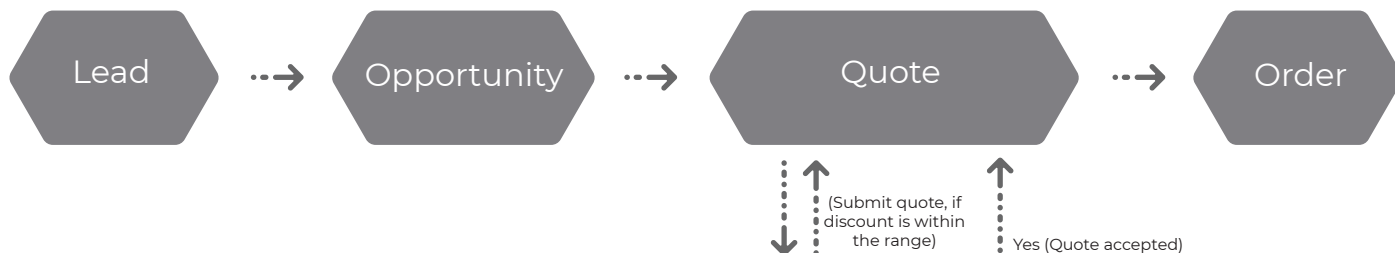
DPA includes detailed pricing information over the out-of-box functionality of Dynamics 365 for Sales and the possible discount levels. The global level discount is applied overall i.e. on all the products/services. Using pricing extension, user can go to individual product / service page and change the amount (if required). This extension is helpful while finalizing discount and best selling price for the product / service on quotation.

Quotation extension

This functionality simplifies the process of qualifying the quote and converting it into an order. It consists of: Quotation Assistant and Approval Workflow. When users create a quote, they may want to change the discount price for a product or the overall quote. For this purpose, a Quotation Assistant is available which provides product-wise history with customer details for reference. If the discount to be offered is within their stipulated limit, then based on the margin, they finalize the deal and the quote gets converted into an order. If the discount to be offered is not within his / her stipulated limit, then based on the offered discount, the quote gets escalated to the respective manager depending on the selected approval-levels.

How Does It Work?

Dynamics 365 for Sales



Key Benefits



About Synoptek

Synoptek is a global systems integrator and managed IT services provider offering comprehensive IT management and consultancy services to organizations worldwide. Founded in 2001; headquartered in Irvine, CA, we have offices and resources across North America and delivery centers in Europe and India.