



PROS Smart CPQ Customer Trial Experience

USERS GUIDE WITH STEP-BY-STEP DIRECTIONS FOR SMART CPQ FREE TRIAL





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Welcome

Thank you for your interest in the PROS Smart CPQ trial experience on Microsoft Dynamics 365. PROS is excited to provide this free trial as a way to show you how Smart CPQ can help you transform your business by delivering sales automation and profits through personalized selling.

You can experience the free trial as one of four different personas:

1. Sales Rep
2. Product Line Manager
3. Sales Director/VP of Sales
4. Paralegal

The hands-on-trial is available for the Sales Rep and Product Line Manager and this users guide will provide you with step-by-step directions to ensure a successful trial experience.

You can also watch videos for each persona to see how Smart CPQ enables a frictionless experience for key stakeholders involved in the sales process.

What's Needed for this Trial?

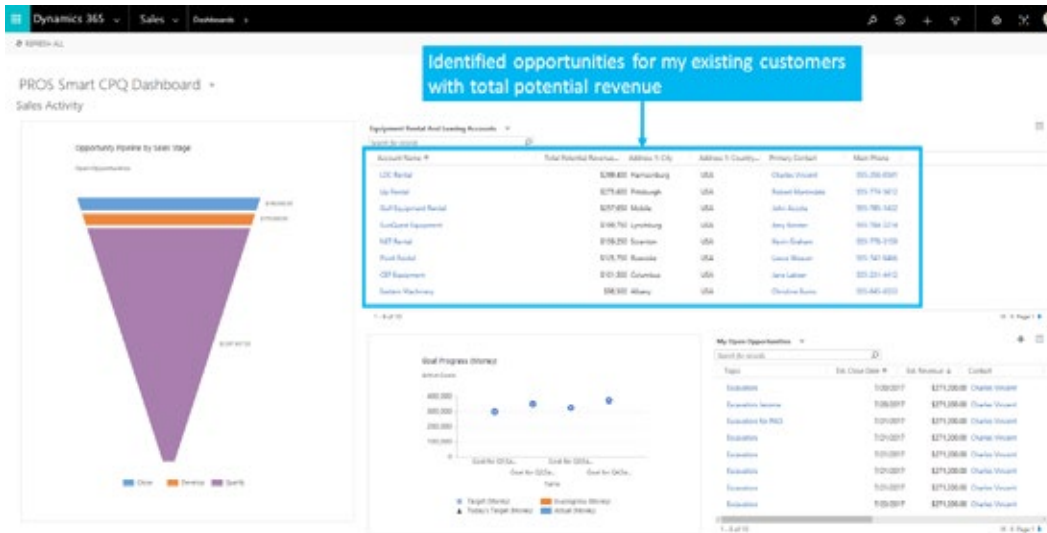
1. A computer/mobile device with web access.
2. A Microsoft AppSource account. Sign up for a free account [here](#).



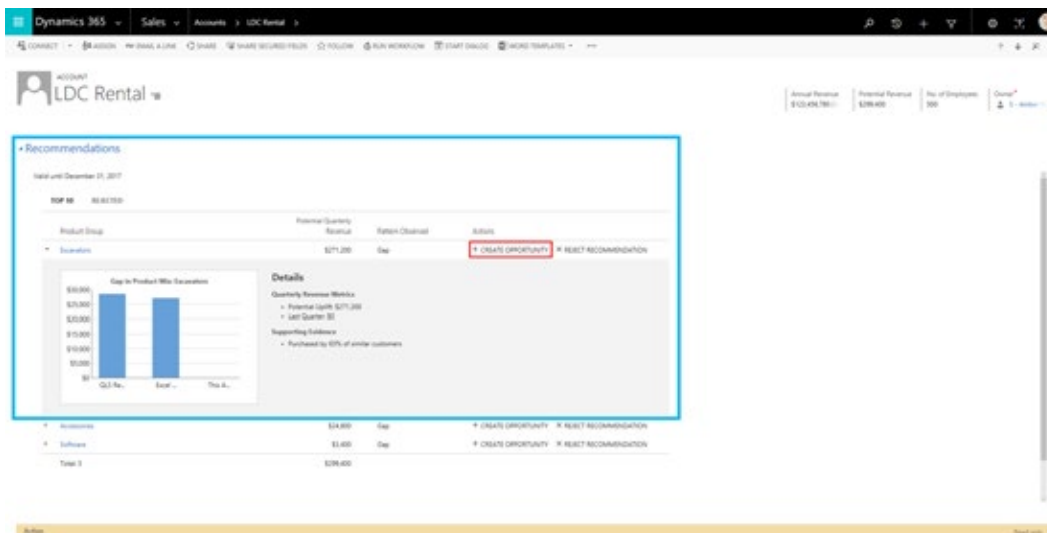
Sales Rep Trial

1. Access the free trial for Dynamics 365 [here](#)
2. Sign into your Microsoft account (create a new one [here](#) if you don't already have one).
3. Once you sign into your Microsoft account, this will redirect you to the free trial landing page.
4. At this point, PROS will provision a new environment for you which will take about 4-5min. During this time the "FREE TRIAL" button will be disabled. Once the environment is fully provisioned, you'll be able to click on the "FREE TRIAL" button.
5. Click on the "FREE TRIAL" For the sales rep.

6. This will launch Dynamics 365. In the top right box you'll see a list of accounts with PROS identified opportunities where you can take action and impact revenue. You can select any account but for this user's guide we'll use the first account for LDC Rental. Click on this link.

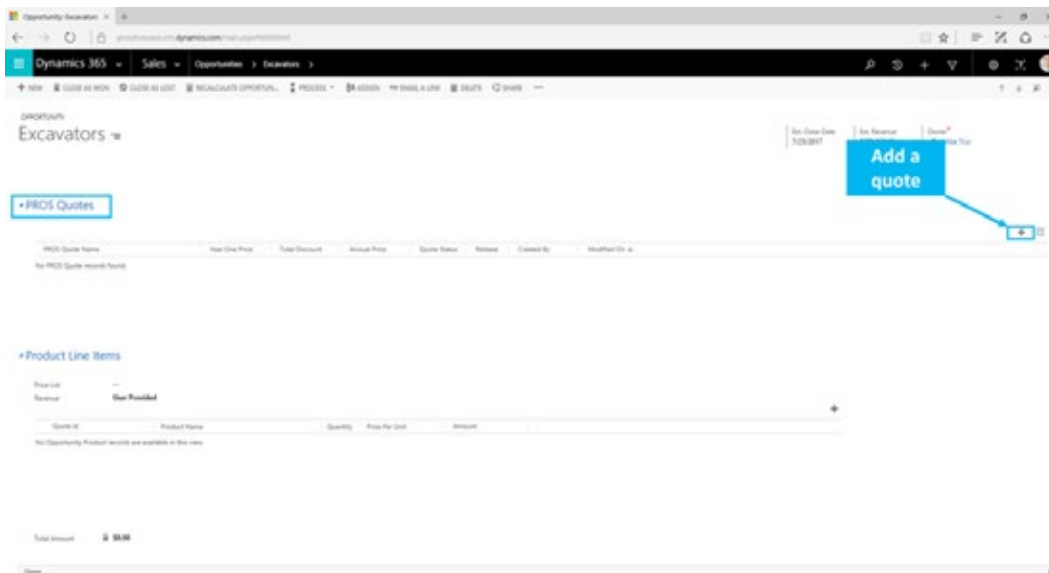


7. This will now open the LDC Rental account page. Scroll down the page to find the recommendations section. Expand the section to see the identified recommendations for LDC Rental where you can impact revenue.
8. In this section you'll see recommendations for you to sell excavators, accessories or software. Expand the recommendations for excavators by clicking on the down arrow.
9. Now you can see the supporting evidence for why this is a good recommendation for LDC Rental. Now click on the "Create Opportunity" action.

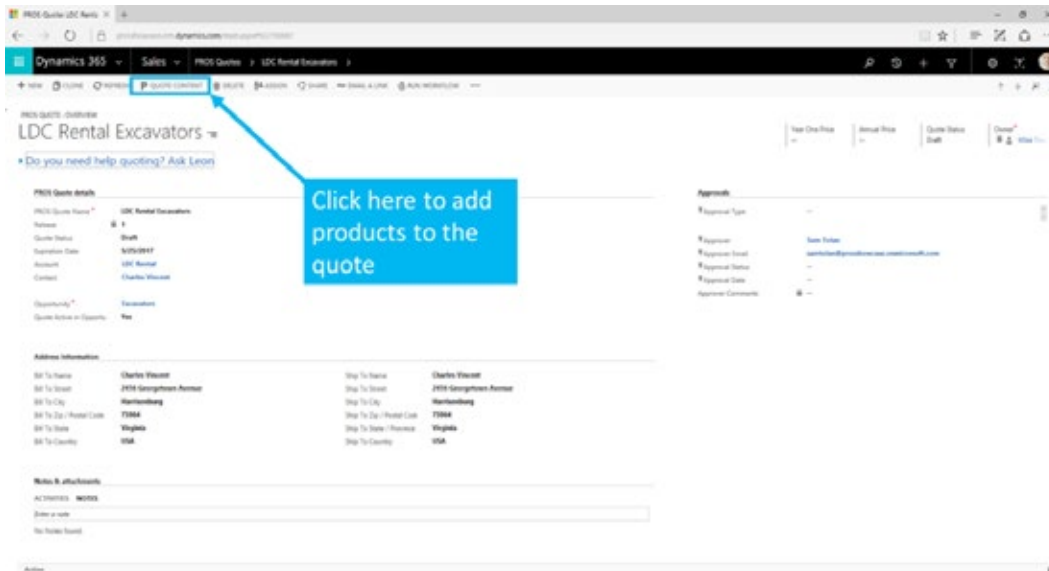




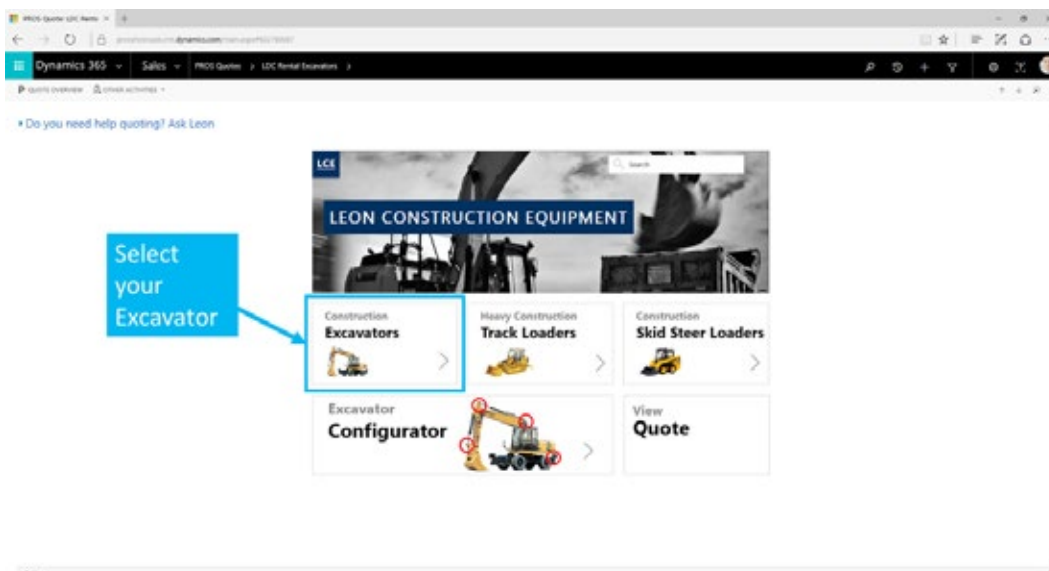
10. The opportunity automatically inherits the details of the recommendation. Now hit the Save button underneath the Dynamics 365 menu bar.
11. Now that the opportunity is saved you can add a quote to the opportunity. Scroll down to the PROS Quotes section, click on the + button to add a new quote to the opportunity.



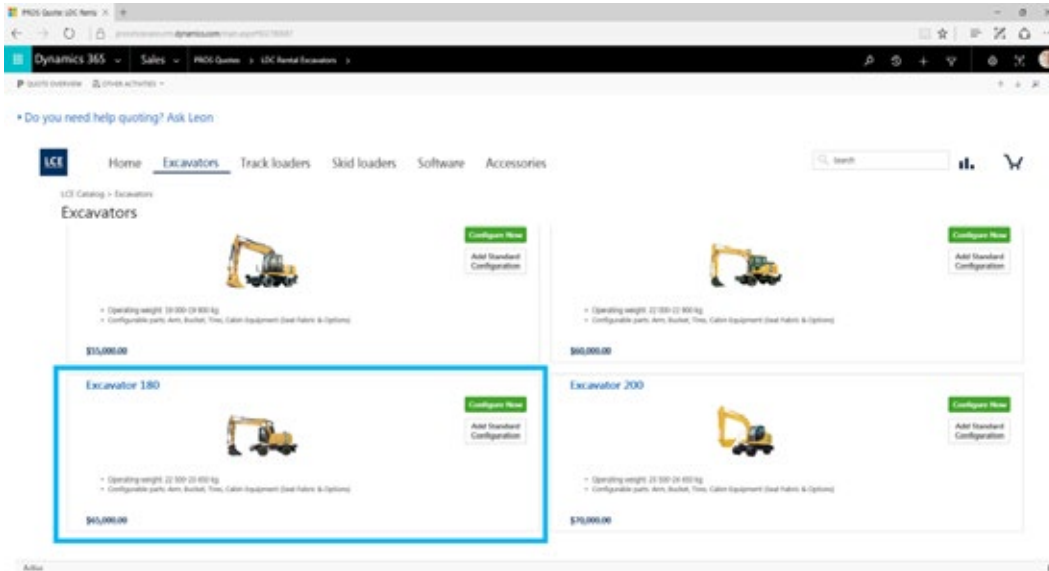
12. Enter a name for your quote and save. The quote is now saved to the opportunity. Click on the quote to open it.
13. Once the quote is open, you can now start adding products from your catalog by navigating to the Quote Content section.



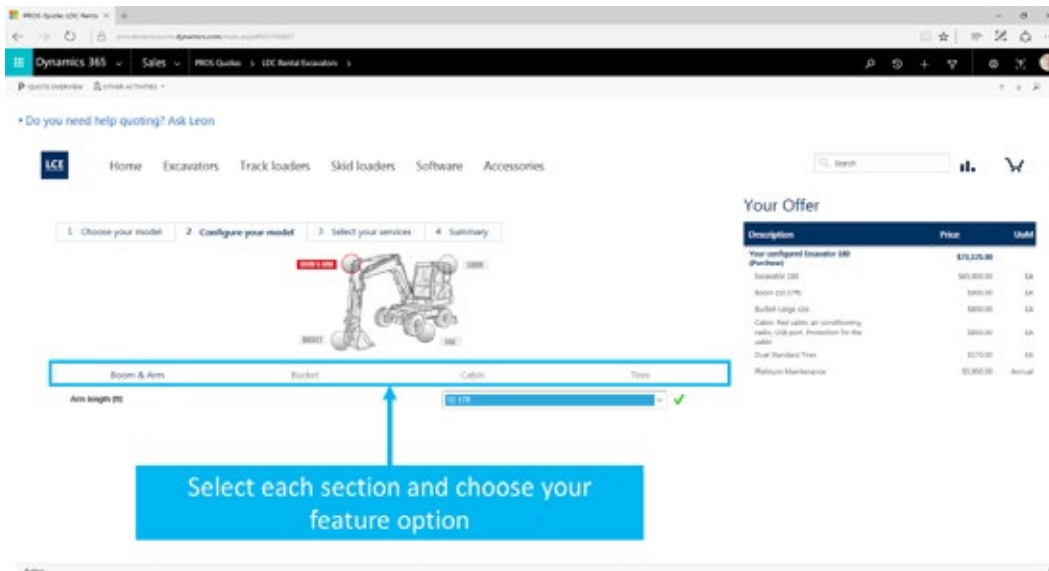
14. From your catalog, you can now select your excavator.



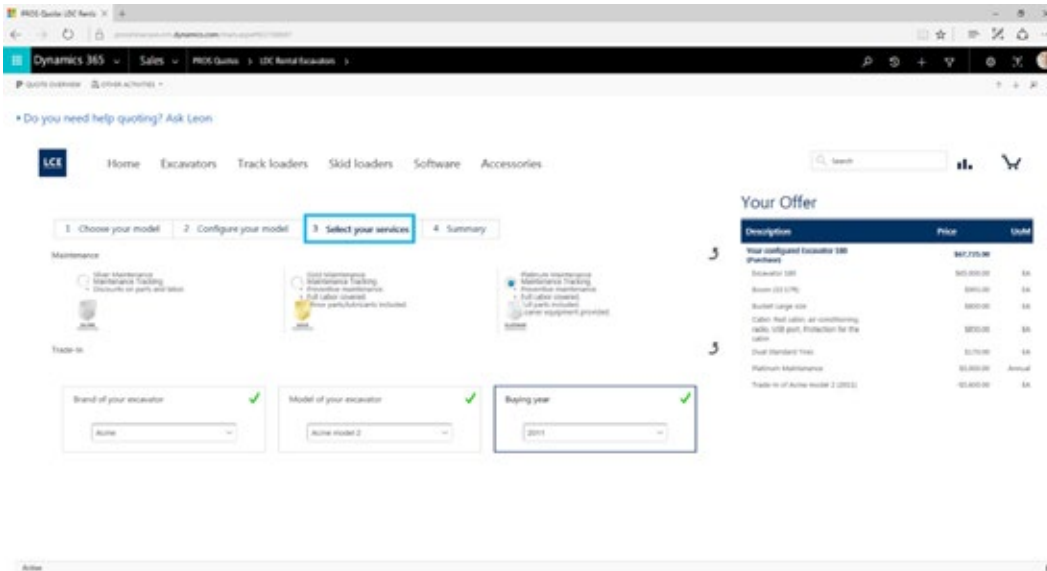
15. You can select and configure any excavator but for this user guide configure Excavator 180.



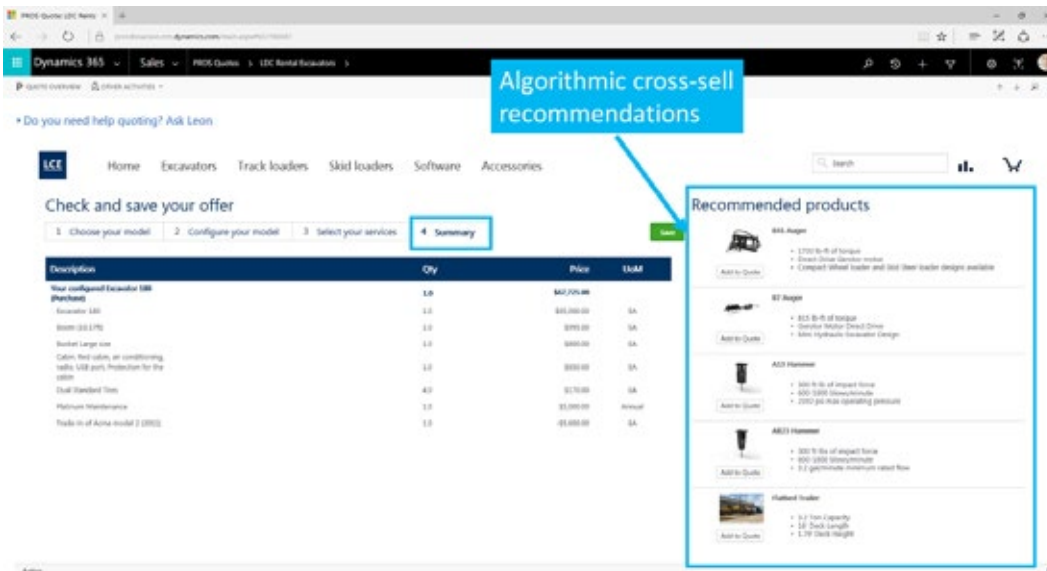
16. Configure the Boom & Arm, Bucket, Cabin, and Tires sections by selecting your options for those features.



17. Navigate to the Select your services tab to select your services and add a trade in.

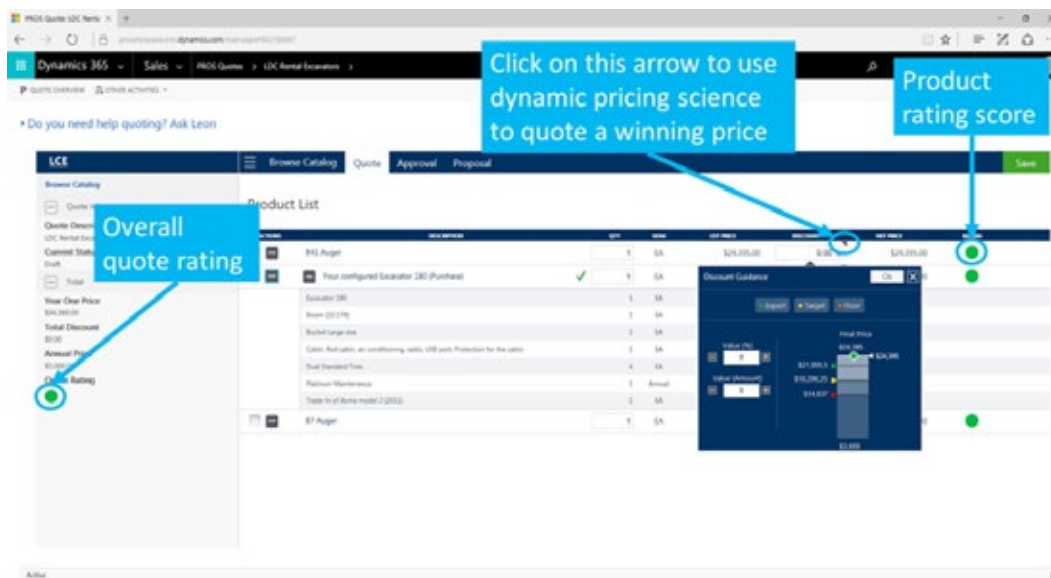


18. Click on the summary tab to view the summary of your configuration. Before you save, use algorithmic cross-sell recommendations to increase your deal size for LDC Rental. Now hit save.

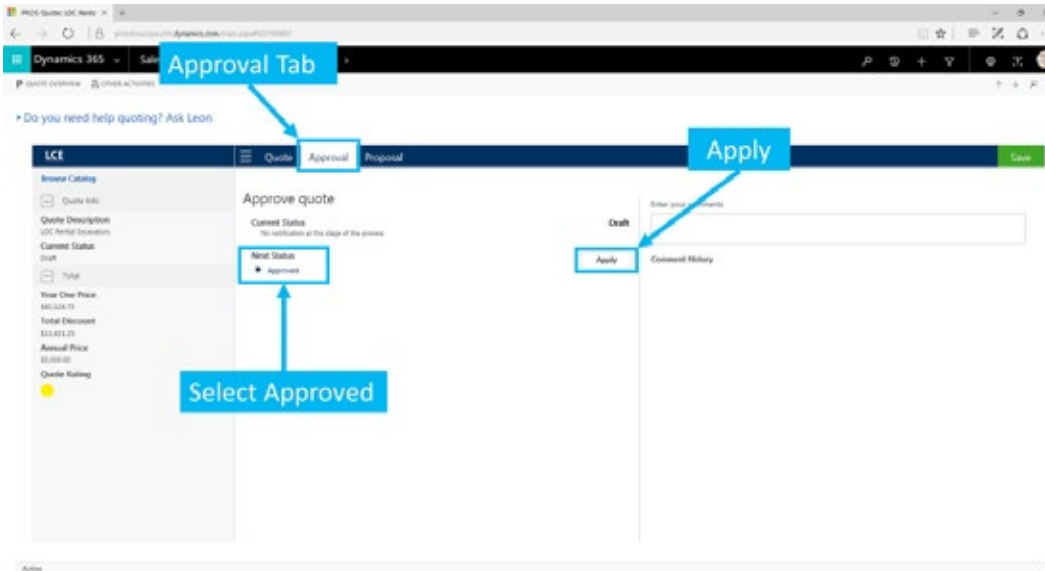




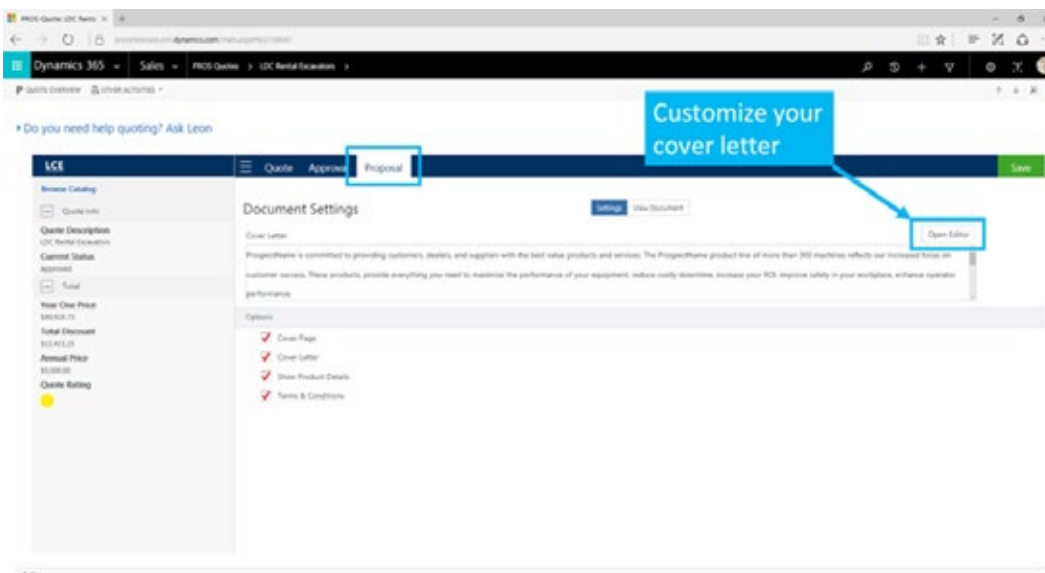
19. Now that you have your products in your cart, you can leverage dynamic pricing science to optimize your pricing so you're confident you're providing a winning quote. Click on the upper right corner of the discount box to price your product. Note that you have a rating score for each of the products as well as an overall quote rating score to the right. Provide a price for each of your products. Keep your overall quote rating a green or a yellow when pricing.



20. Because your overall quote rating is green or yellow, you can approve your quote. Click on the Approval tab. Select Approved and click on Apply.

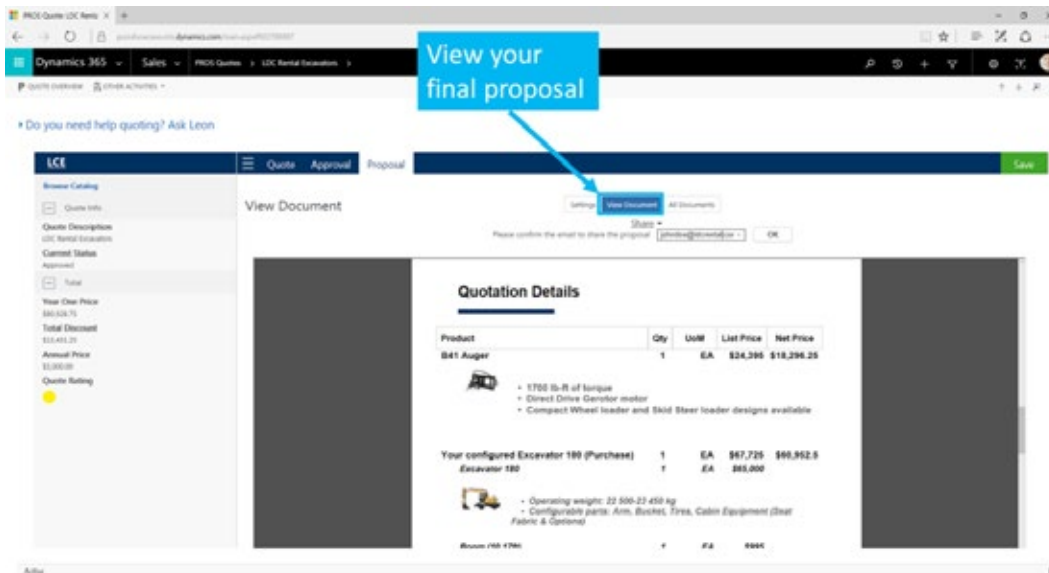


21. Now that this has been approved, you can generate your proposal by clicking on the proposal tab. You can click on open editor to customize your cover letter.

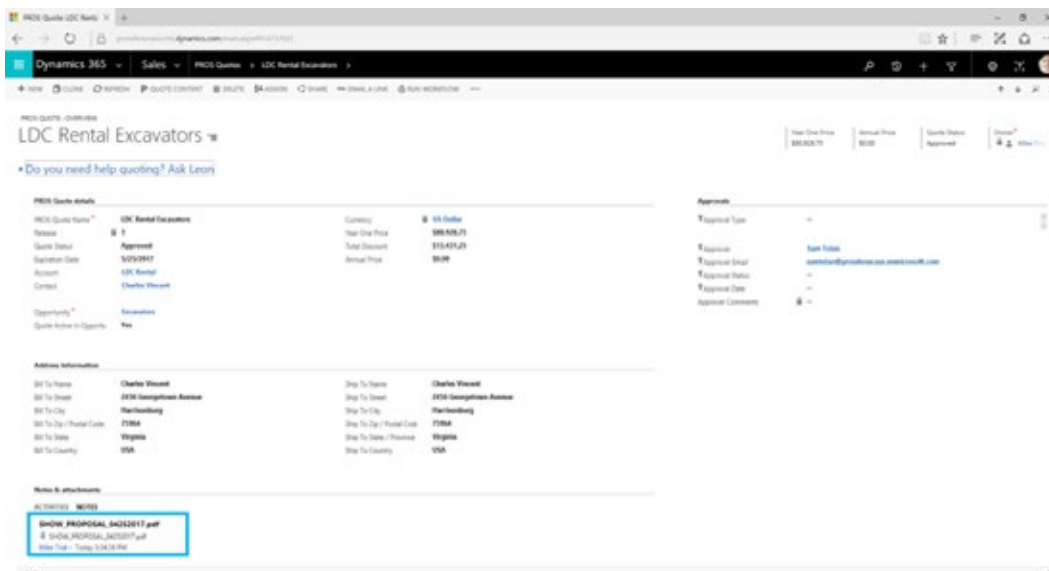




22. You can view your professional proposal document by clicking on the view document tab. In the document you'll find your customized greeting, your quoted products, and your terms and conditions.



23. Once you're done viewing the proposal, save your quote to your opportunity. Now navigate to your quote view. You'll find the proposal which you just created attached to the quote!





Product Line Manager Trial

1. Access the free trial directly at [here](#).
2. Sign into your Microsoft account (create a new one [here](#) if you don't already have one).
3. Once you sign into your Microsoft account, this will redirect you to the free trial landing page.
4. Click on the "FREE TRIAL" For the Product Line Manager.

PROS.

PROS Smart CPQ + Microsoft Dynamics 365
Sales process automation and profits through personalized selling

Sales Rep
As a sales rep your mission is to enter quota. Try this experience to see how PROS can help you identify, increase, and win more opportunities than ever before!

Product Line Manager
As a product line manager, you're concerned about the revenue and margin performance of your products. Try this experience to see how PROS and Microsoft can deliver insights which can help you increase your product performance.

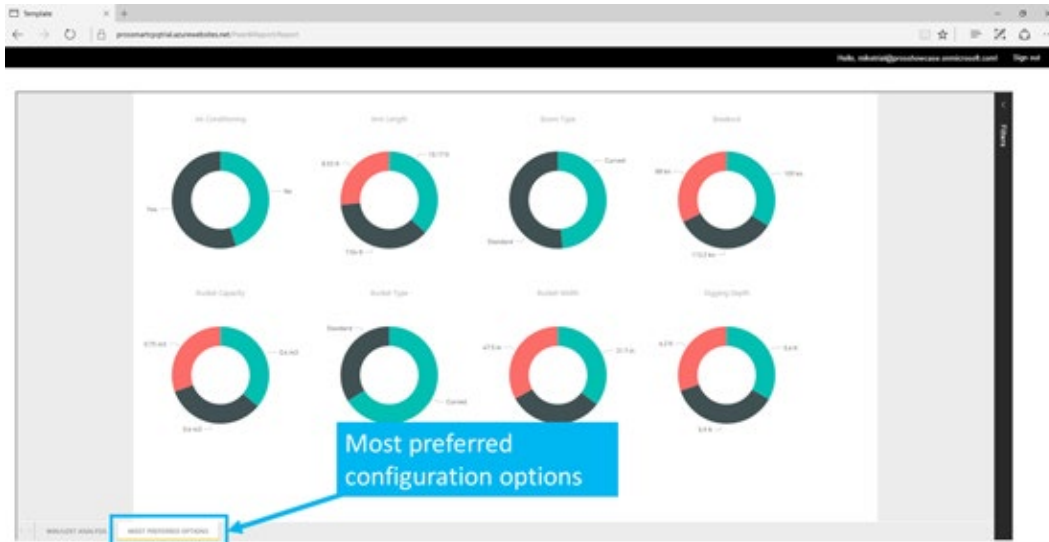
Sales Director/VP Sales
As a sales director, you're responsible for the performance of your team.

Paralegal
As a paralegal, you need a way to efficiently generate and manage contractual documents. Watch this video to see how easy it is with PROS and iCerts to manage your full contract lifecycle.

Click Here

Watch Video
FREE TRIAL

5. This will open up Power BI charts. You'll notice on the bottom left of the page you're viewing the most preferred configuration options for the excavators.

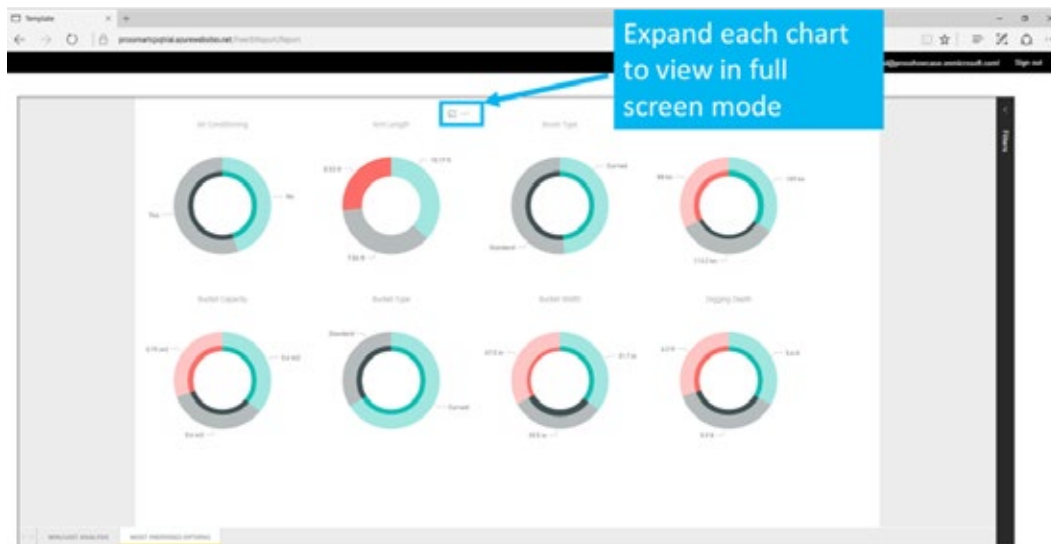


- In the first chart, you can surmise that most customers select the air conditioning option. Hover around the No and Yes selection until you see a pop up box. This box provides additional details on the number of customers who have selected this option and what percentage they make up.

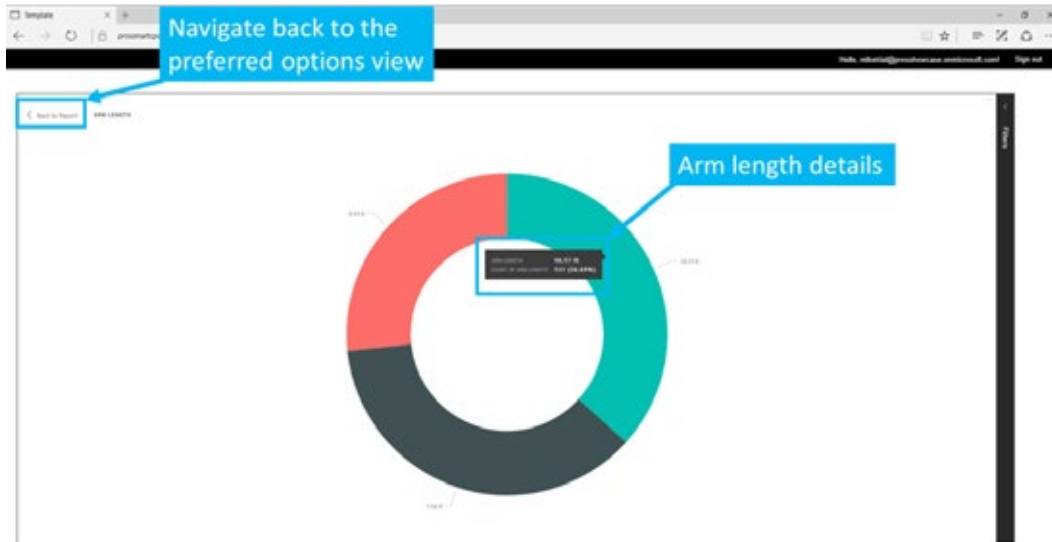




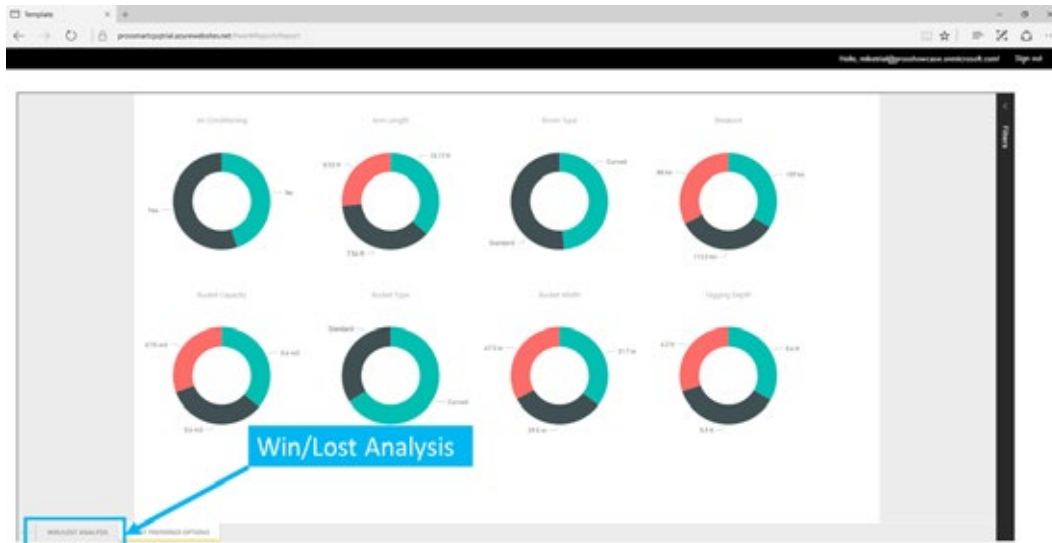
- 7. You can also expand the charts to get a better view. To do this, click on the chart you want to expand, and then click on the full screen button as seen in the image below.



- 8. In full screen mode, you can view details of the product options by hovering over the chart sections. Navigate back to the preferred options page.

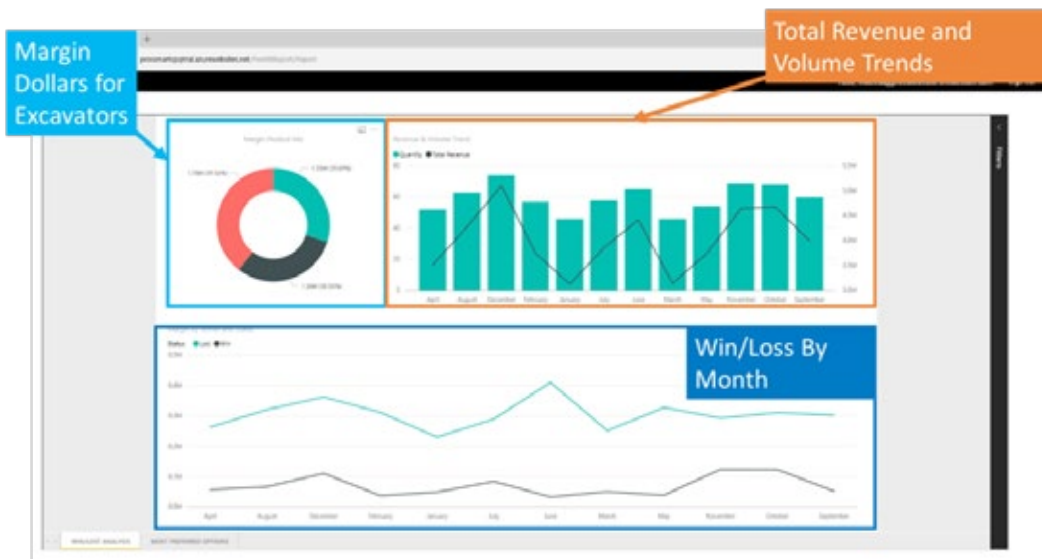


- 9. You can get more insight by clicking into every configuration category to see which options are most preferred by your customers.
- 10. Switch to the Win/Lost Analysis to see your performance metrics.

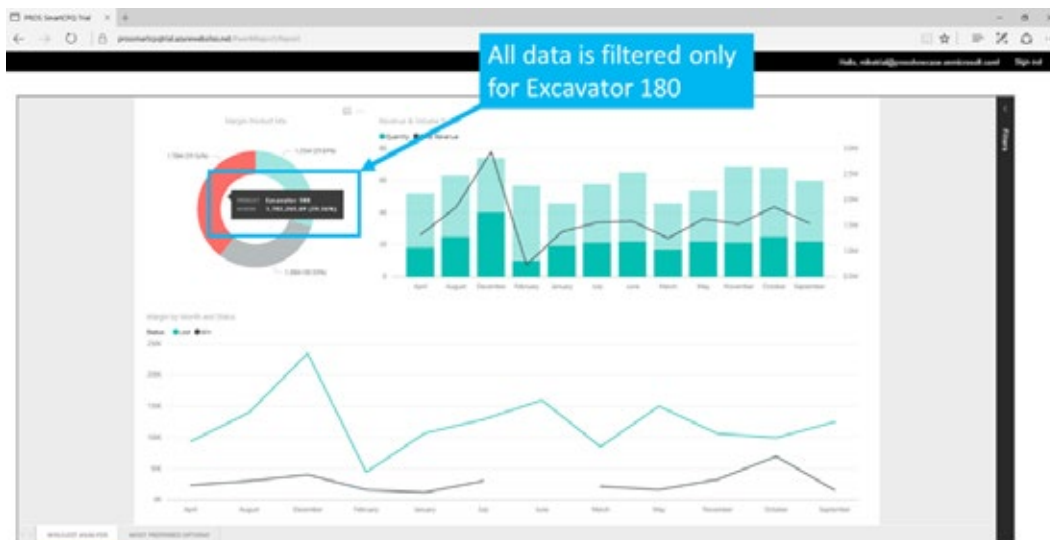




11. This page is broken up into 3 sections: The margin dollars you are getting for each excavator model, the total revenue and volume for each month, and your wins/losses also by month.

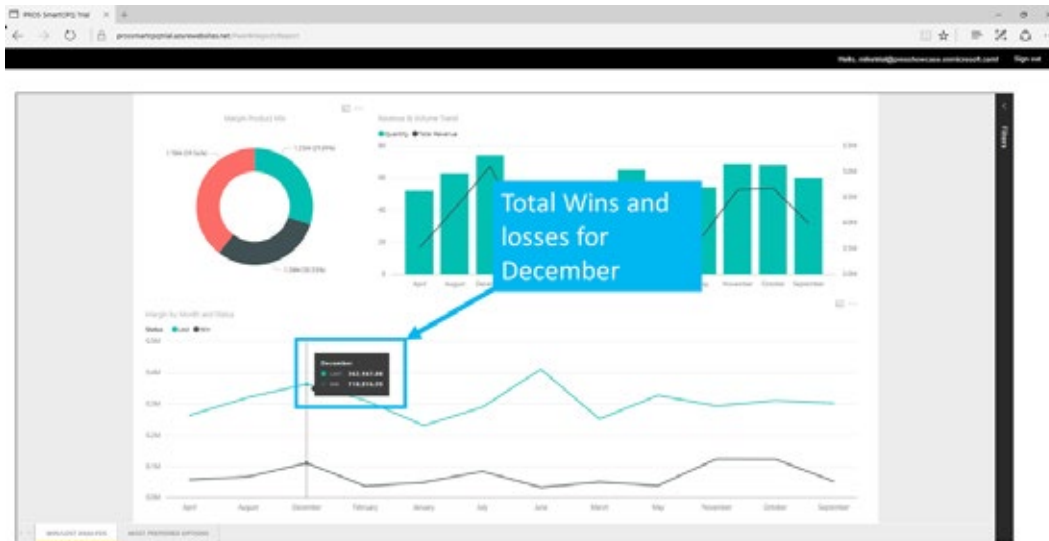


12. You can also hover over different sections for more details. For example, if you hover over the December Win/Lost chart, you can see the total margin dollars your sales team won that month and how much was lost.





13. You can also expand each section for a better view by clicking on the expand window at the top right corner of each section.
14. For more details into each specific excavator, click on the product and watch your charts filter to only show data for that product.





Conclusion

Thanks for using the free trial from PROS. We hope you've learned more about how Smart CPQ and Microsoft Dynamics 365 can enable you to delivered sales automation and profits through personalized selling. To learn more, visit us online at www.pros.com/smartcpq.