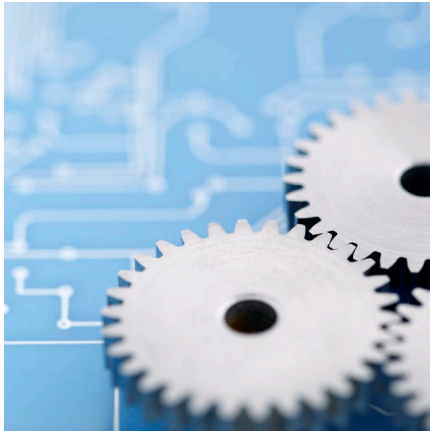




MICROSOFT DYNAMICS 365

DESIGN WIN & SAMPLES MANAGEMENT



For more information, pricing, or to request a demo, contact.

Chris Moore

Partner, Consulting

Chris.Moore@armaninoLLP.com

408.200.6455

With Armanino's Design Win & Samples Management Solution for Dynamics 365 for Sales, companies can more easily manage complex Design Win processes from the initial design collaboration to final product delivery.

By using this solution companies can support the design win lifecycle - from samples management to design registration and through to Design Win and sales forecasting. Design Win and Samples Management for Microsoft Dynamics 365 Sales (and prior versions of Dynamics CRM) includes distributor and manufacturer rep portals that enable a seamless coordination between the production and distribution network. It also supports the ability to track and assign the right contract manufacturer (ODM) and end customer, often an OEM manufacturer. This solution is built upon the Microsoft Dynamics platform and can be integrated into any ERP to seamlessly in pull pricing and push out orders from closed opportunities.

Armanino's Design Win and Samples Management Solution for Microsoft Dynamics 365, supports:

- Design registration process
- Project, program, sales opportunity, rebate and samples management
- Ship and debit contract management
- Design-in and Design-win workflows and business processes
- Complex pricing for RFQ's that may require volume based and time based pricing scenarios
- Commissions and commission splits tracking
- Both marketing and production part numbers
- Visibility of all products, sales opportunities and distributor and manufacturer relationships on a single screen
- Ability to evaluate multiple distributors and select them for contracts or projects
- Advanced analytic reports and dashboards for Design Win management, wins/ losses and post design win forecasting

With Armanino's Design Win and Samples Management Solution for Microsoft Dynamics 365 manufacturers gain the insight and tools necessary to transform customer requirements into proven designs and winning proposals. Use this solution to:

- Streamline and automate business processes throughout the design win and design registration lifecycle
- Increase visibility across the Design Win process, from start to finish
- Improved project coordination between sales, outside contractors, engineering, distributors and product marketing
- Create a centralized document repository for spec sheets, design sheets and similar documentation
- Support tight integration with any ERP to pull in pricing or push out orders

Features and Screenshots

Dashboards provide a consolidated view of the various aspects of the Design Win process, eliminating the needs to frantically search for information around Design Registrations, Projects, Sample Requests, and other key industry data elements.

The screenshot displays a Microsoft Dynamics CRM dashboard for 'Design Win'. At the top, there are navigation tabs for 'Microsoft Dynamics CRM', 'WORKPLACE', and 'Dashboards'. Below this, there are utility buttons like 'SAVE AS', 'NEW', 'REFRESH ALL', 'ADVANCED FIND', and 'SEARCH'. The main content area is divided into two primary sections: 'Active Design Registrations' and 'Active Projects'. Each section contains a table with search filters and columns for various attributes like Registration Number, Customer, Distributor, Manufacturer, ODM, Quantity, Date Submitted, and Status. Below the tables, there are three charts: 'Disti vs OEM vs Rebate Amounts' (a bar chart comparing rebate amounts), 'Design Registrations by Distributor' (a pie chart showing the distribution of registrations), and 'Sales Pipeline' (a funnel chart showing open opportunities). The dashboard also includes a footer with page information like '1 - 8 of 10' and 'Page 1'.

Design Registration:

The Design Registration form provides the ability to manage the design registration process, associated products & Distributor/OEM/ODM relationships. In addition, this forms ties together the Design Registration with a related project and sales opportunity.

The screenshot shows the 'Design Registration: INFORMATION' form for 'Medtronic - 4/2/2014'. The form is organized into several sections:

- Registration Details:** Includes fields for Date Submitted (4/2/2014), Status (Approved), Status Reason (In Progress), Customer (Medtronic), and Quantity First Year (150,000).
- Project Information:** Shows Project (Medtronic Project), Owner (Scott Mangelson), Customer Contact (Steve Schmutz), and Registration Number (4582).
- Product List:** A table listing products with columns for Product, Quantity, Average Selling Price, Value First Year, Customer, Project, and Design Registration. Two products are listed: Resistor (10,000 units, \$4.00) and HiRel (150,000 units, \$5.00).
- Relationships:** A section detailing the roles of various entities: Distributor (Arrow Electronics), Manufacturer/OEM (Medtronic), ODM (Sanmina-SCI Corporation), Distributor Contact (Heidi Tucker), Manufacturer/OEM Contact (Steve Schmutz), and ODM Contact (Rhett Thompson).
- Opportunities:** A table showing target opportunities with columns for Target Opportunity, Est. Revenue, Partner, Pipeline Phase, and Potential Customer. One opportunity is listed: Medtronic Semi Opp with an estimated revenue of \$1,004,000.00.

Sample Request

The Design Win solution includes forms and processes to help streamline the sample request process, including automated approval routing and product management, and provides order fulfillment capabilities product setup when integrated with your back office ERP system.

Microsoft Dynamics CRM | HI TEK | Sample Requests | Medtronic: SR 1234

NEW DEACTIVATE DELETE ASSIGN SHARE

SAMPLE REQUEST : INFORMATION

Medtronic: SR 1234

General

Sample Request #	SR 1234	Distributor	Arrow Electronics
Customer	Medtronic	OEM	Medtronic
Opportunity	Medtronic Semi Opp	ODM	Sanmina-SCI Corporation
Sales Rep	Scott Mangelson		

Sales Manager: [Anne Taylor](#) Status: **Approved** Date Approved:

Address

Ship To	--	City	Saint Helena
Attention	Steve Schmutz	State	CA
Line 1	1185 Starr Ave	Postal Code	94574
Line 2	--		

Requested Products

Status	Requested Item ↑	Product	Quantity Requeste...	Requested Ship Da...	Quantity Shipped	Shipped Date	Sales Manager...
Requested	Resistor	Resistor	50	7/17/2014			Dave Bellomy
Shipped	Resistor	HiRel	25	4/2/2014	25	4/1/2014	Scott Mange...

Design Opportunity Management

As part of the design registration process, design opportunities can manage the associated sales cycle, keeping track of revenues and contacts associated with it and of contract manufacturers who will ultimately build the OEM's product.

Microsoft Dynamics CRM | HI TEK | Opportunities | Medtronic Semi O... | Create | Dave Bellomy HI-Tek

NEW CLOSE AS WON CLOSE AS LOST RECALCULATE OPPORTU... ASSIGN

OPPORTUNITY

Medtronic Semi Opp

Sales Rep: [Scott Mangelson](#) Est. Revenue: \$1,004,000.00 Est. Close Date: 4/30/2014

GENERAL INTEREST CUSTOMER QUOTE SAMPLE REQUEST Verbal (Active) Close

Confirm Interest: Yes

Summary

Target Opportunity	Medtronic Semi Opp	Pipeline Phase	4-Verbal
Potential Customer	Medtronic	Design Stage	Sample Sent
Contact	Steve Schmutz	Probability (%)	40
Territory	Mid West		
Description	This is an opportunity for some of our best products	Commissions	
Project	--	Sales Rep 1	Scott Mangelson
		Commission %	7
		Sales Rep 2	Rob Harrison
		Commission %	4
		Sales Rep 3	Anne Taylor
		Commission %	3

Distributor: [Arrow Electronics](#)
 Distributor Contact: [Rhett Thompson](#)
 Manuf/OEM: [Medtronic](#)
 Manufacturer Coni: [Steve Schmutz](#)
 ODM: [Sanmina-SCI Corporation](#)
 ODM Contact: [Heidi Tucker](#)

Sample Requests

Sample Request #	Customer ↑	Sales Rep
SR 1234	Medtronic	Scott Mangelson

ACTIVITIES NOTES

All - | Add Phone Call Add Task ...

- Proposal Follow-up
Follow up on meeting to close agreements
Modified by [Scott Mangelson](#) 12/19/2014 10:34 AM
- Quote Proposal
Share quote resulting from Design Registration and Samples Requests - 18 mont...
Modified by [Scott Mangelson](#) 12/19/2014 10:30 AM
- Steve Schmutz
Follow up with Steve @ Medtronic
Completed by [Dave Bellomy](#) 12/19/2014 9:03 AM

Forecast Management

Provides the capability to incorporate forecasting specifically around design needs into the overall global manufacturing forecast of an organization.

The screenshot shows the 'Medtronic Semi Opp' opportunity page in Microsoft Dynamics CRM. The top navigation bar includes 'Microsoft Dynamics CRM', 'HI TEK', 'Opportunities', and 'Medtronic Semi O...'. The main header displays the opportunity name and key metrics: Sales Rep (Scott Mangels), Est. Revenue (\$1,004,000.00), and Est. Close Date (4/30/2014). A progress bar indicates the current stage is 'Verbal (Active)'. Below the progress bar, there are sections for 'Product Line Items', 'Quotes', and 'Forecasts'. The 'Forecasts' section shows 'Last Forecasted' on 6/15/2014. A table lists forecast data for various periods from 4/2/2014 to 11/2/2014, including account end customer (Medtronic), product (HiRel), SKU, forecast quantity, and forecast price.

Period Date	Account End Customer	Product	SKU	Forecast Quantity	Forecast Price
4/2/2014	Medtronic	HiRel		2,500	\$7.00
5/2/2014	Medtronic	HiRel		1,300	\$5.00
6/2/2014	Medtronic	HiRel		10,000	\$5.00
7/2/2014	Medtronic	HiRel		12,000	\$4.75
8/2/2014	Medtronic	HiRel		8,000	\$4.25
9/2/2014	Medtronic	HiRel		10,000	\$5.00
10/2/2014	Medtronic	HiRel		10,000	\$5.00
11/2/2014	Medtronic	HiRel		12,000	\$5.25

Account Management

In addition to core account management capabilities, the Design Win solution provides added benefits to view manufacturing back office information around POS, POA & Booked, Billed & Backlog.

The screenshot shows the 'Medtronic' account page in Microsoft Dynamics CRM. The top navigation bar includes 'Microsoft Dynamics CRM', 'HI TEK', 'Accounts', and 'Medtronic'. The main header displays the account name and key metrics: Annual Revenue (\$16,900,000.00), No. of Employees (46,000), and Owner (Scott Mangels). The page features several charts: 'Revenue' (POS by Month), 'POA by Month', and 'Booked, Billed, Backlog'. A 'Summary' section provides account information, activities, and contact details for Steve Schmutz.

Revenue (POS by Month):

Month (Date)	Sum (Amount) (\$)
Feb 2014	\$1,200.00
Jan 2014	\$1,250.00

POA by Month:

Month (Date Fulfilled)	Sum (Total)
Mar 2014	\$15,000.00
Apr 2014	\$10,000.00

Booked, Billed, Backlog:

Existing Product	Booked	Billed	Backlog
HiRel	~\$2k	~\$1k	~\$1k
Resistor	~\$12k	~\$1k	~\$1k

Summary:

ACCOUNT INFORMATION

Account Name: Medtronic
 Phone: 1-763-514-4000
 Fax: 1-763-855-4566
 Website: http://www.medtronic.com
 Parent Account: --
 Ticker Symbol: MDT

ADDRESS

710 Medtronic Parkway
 Minneapolis, MN 55432
 USA

ACTIVITIES

Primary Contact: Steve Schmutz
 E-mail: sschmutz@mdt.com
 Business: 801-965-5584

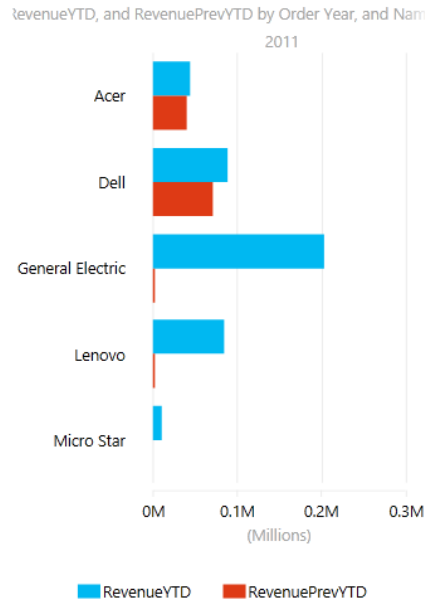
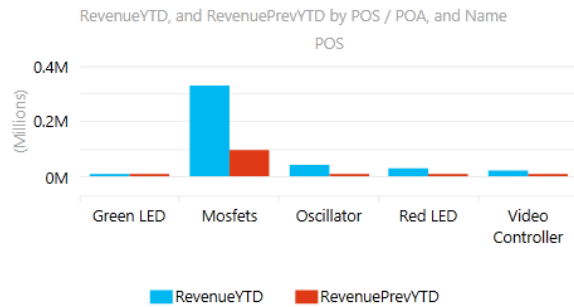
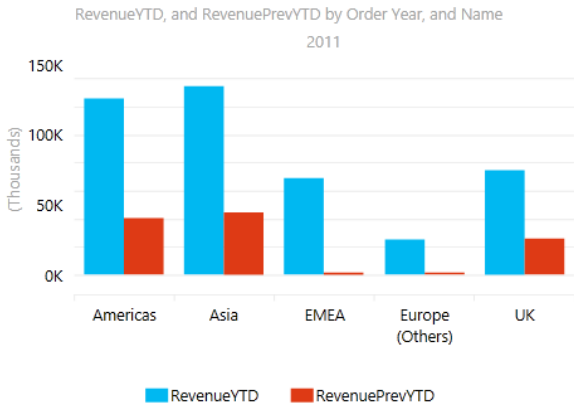
CONTACTS

Full Name	E-mail
Fred Silva	FSilva@mdt.com
Sandra Smith	ssmith@mdt.com
Steve Schmutz	sschmutz@mdt.com

Analytics

Enhanced analytic capabilities allow organizations to view complex year over year trends, forecasting pivots, territory analysis, forecast vs actuals, and other critical Design Win metrics.

Top Customer Year over Year Performance Analysis



Filters

VIEW

- ▶ Distributor
is Arrow, Avnet or Digikey
- ▶ Name
is Acer, Dell, Micro Star, Lenovo or General Electric
- ▶ Name
is not SUV
- ▶ Order Year
is not (Blank), 2010, 2013 or 2012

About Armanino

Armanino works with growth-oriented companies to simplify customer data management and streamline business development processes. As one of the world's leading integrators of Microsoft Dynamics 365, we have the background and experience to integrate our product with virtually any business-critical system. In fact, our CPA roots give us exceptional credentials to synchronize your customer data with ERP and financial systems. At Armanino, we deliver the tools you need to focus on your customers and grow.