



MICROSOFT LABS JULY 8, 2019

## DYNAMICS 365 DEAL MANAGEMENT

A CRM Solution to Manage the Special pricing and Deal registration requests for their customers.

### Contents

Overview.....	2
Deal Management.....	2
Configuration.....	2
Deal Components Creation.....	3
Create Request.....	10
Approval Process.....	13

## Overview

This solution, built on Dynamics 365, seamlessly works with Dynamics CRM 9.0 and later.

## Deal Management

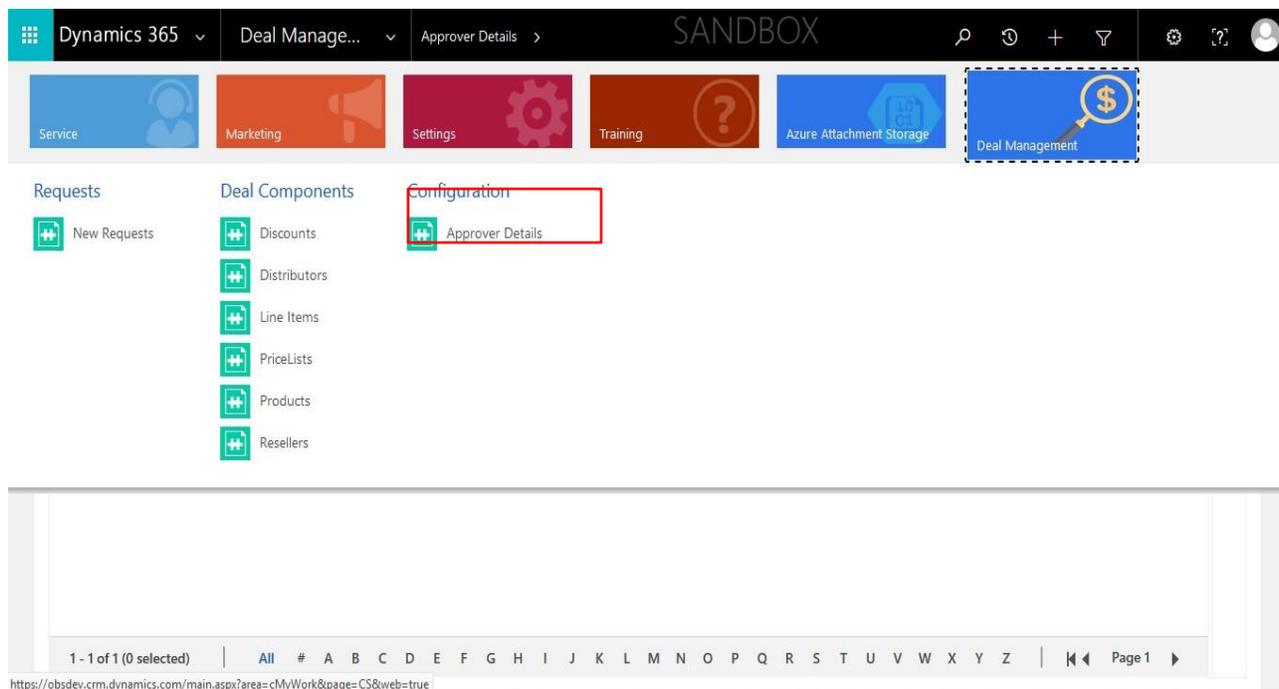
The Deal Management solution can be used for any Dynamics 365 system to create special pricing and deal registrations requests for their customers with discounts on the products. This solution will provide the ability to the end users to define deal parameters – including Distributors, Resellers, Products, Pricelists and discount levels based on the product quantity range. Also, this solution will provide auto email triggering feature to the external customers on request creation and internal approval process emails (3 layers of approvals) to validate and complete the process.

This section outlines the steps to be performed by a System Administrator to make Solution available to the end users.

The below diagram summarizes the configuration and usage of Deal Management solution, and the processes that runs in the backend.

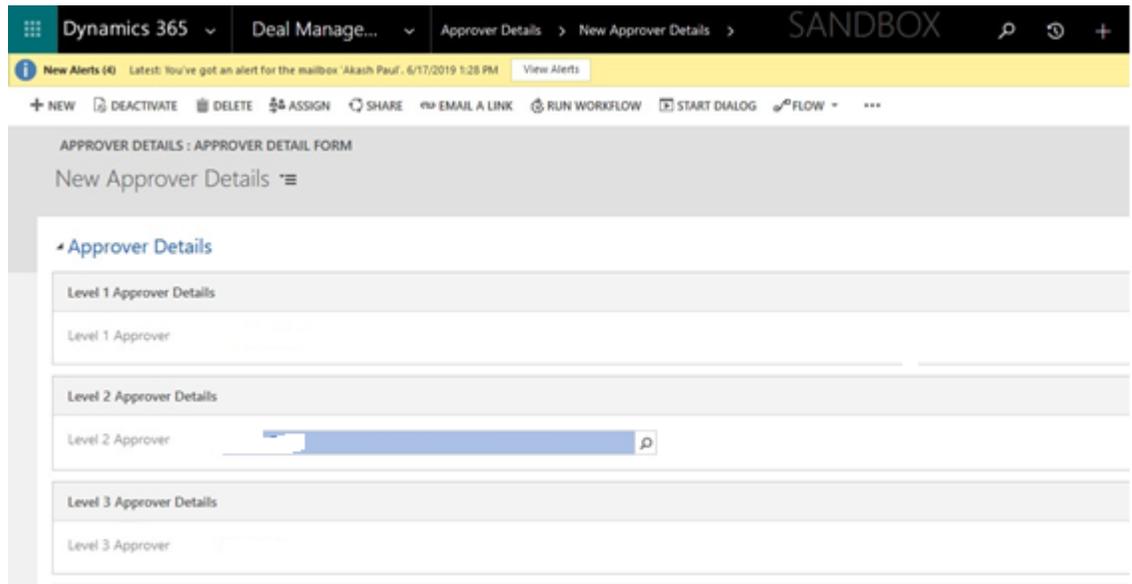
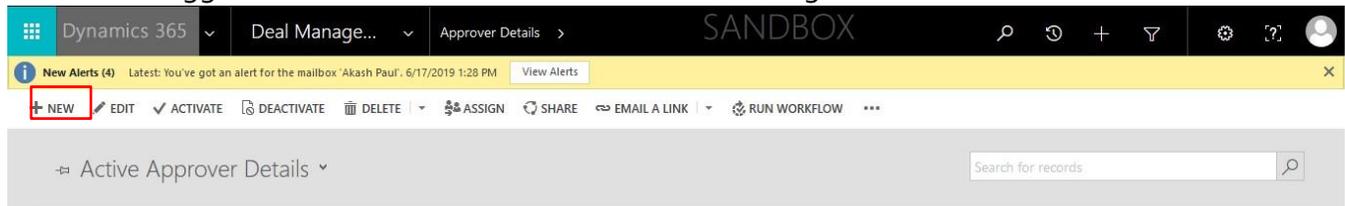
## Configuration

1. Open Microsoft Dynamics 365
2. Go to **Deal Management | Configuration**



3. Click on **+NEW** and create an **approver configuration** record with the approver details. These approvers would be the Users in the same organization and part of the CRM users. Currently in this version, we are providing option to select the User view for this look up.

**Note:** We will make this look up for Queue in next version of this solution. Queue will enable the solution to trigger the emails to the set of Users instead of single user.



**Level 1 Approver:** User of the CRM organization.

**Level 2 Approver:** User of the CRM organization.

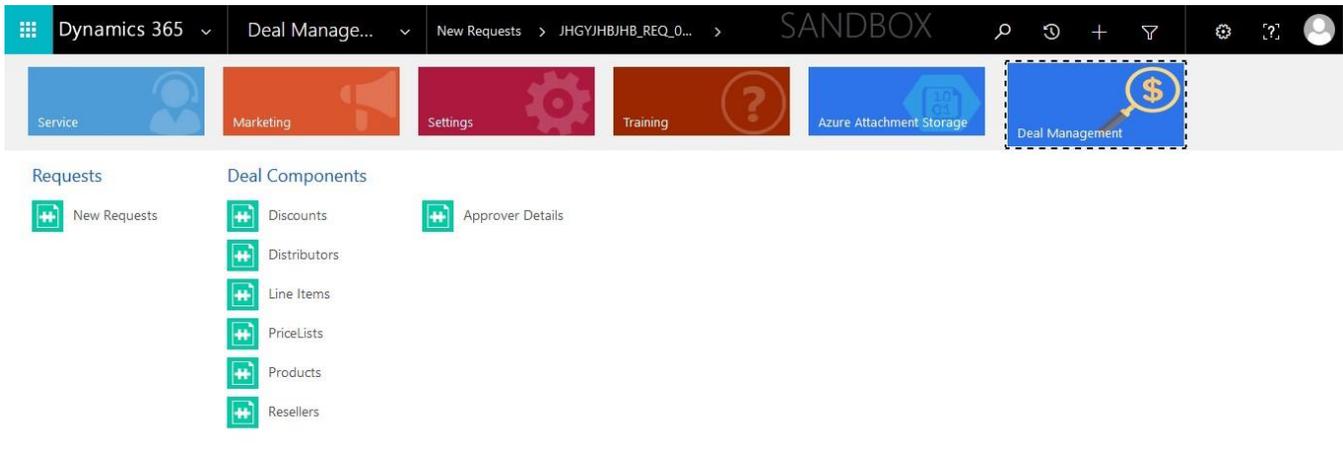
**Level 3 Approver:** User of the CRM organization.

*There can same or different users on the different levels of approvers.*

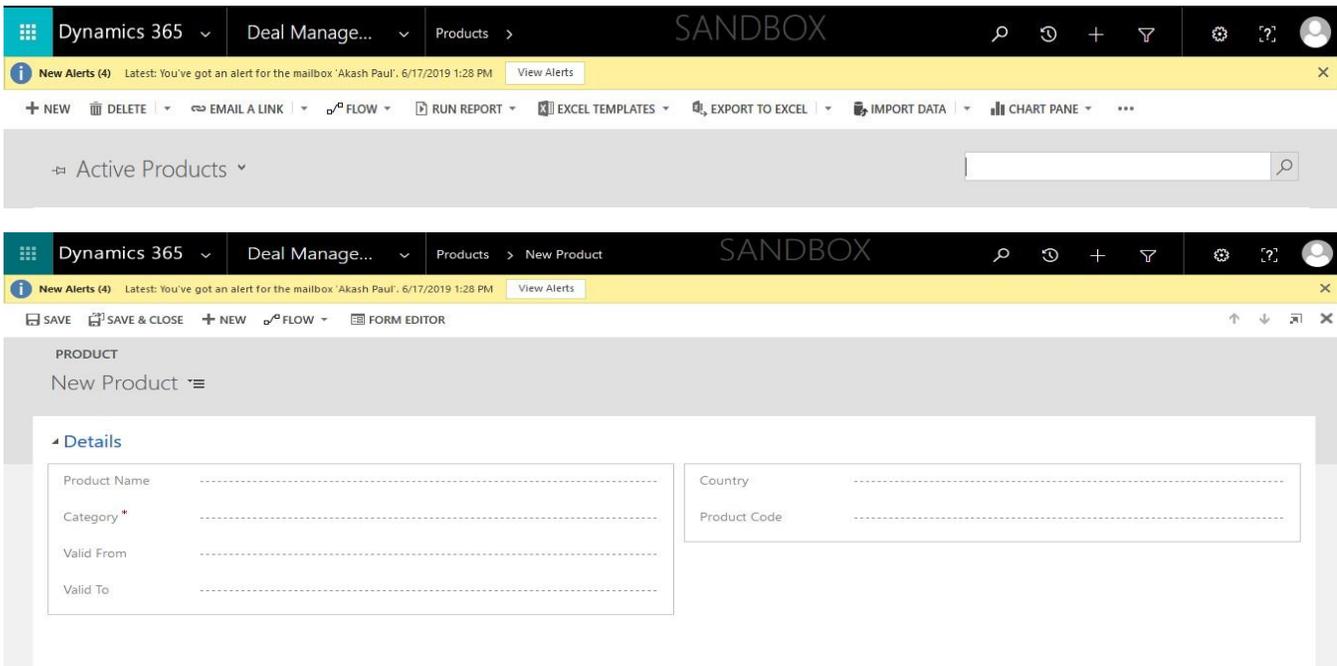
## Deal Components Creation

### Product

User can define the products which they can use for Special pricing, Deal Registration. Currently this entity has limited information, based on the solution usage and external customer feedback, we will review the fields information and update the solution accordingly in coming versions.



- Click on **+NEW** and create a **product** record with the necessary details



**Name:** Give a relevant name for the product. This name will be used as reference in related entities.

**Category:** Includes 3 categories, namely Hardware, Accessory and Warranty.

**Valid From:** Product validity start date.

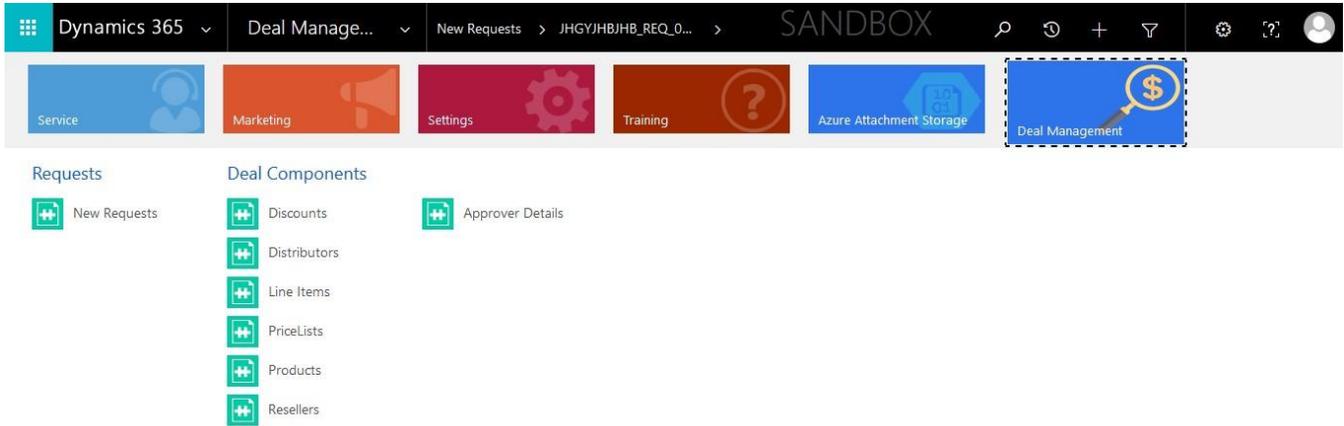
**Valid To:** Product validity end date.

**Country:** Country from where the product is being sold

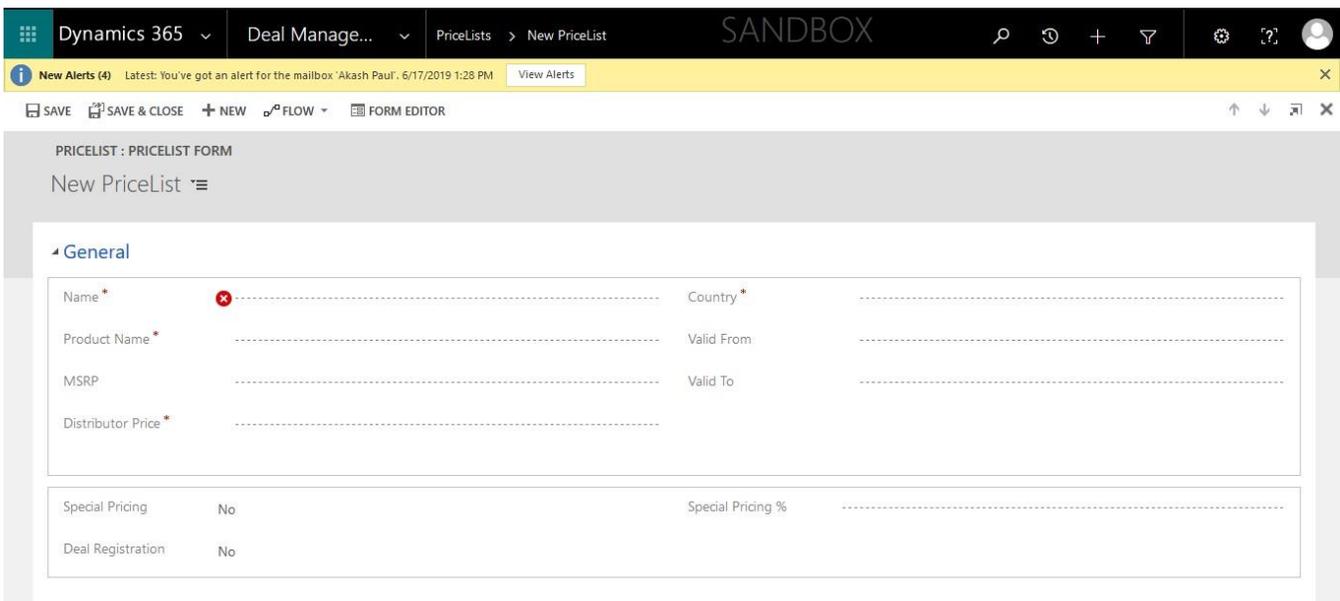
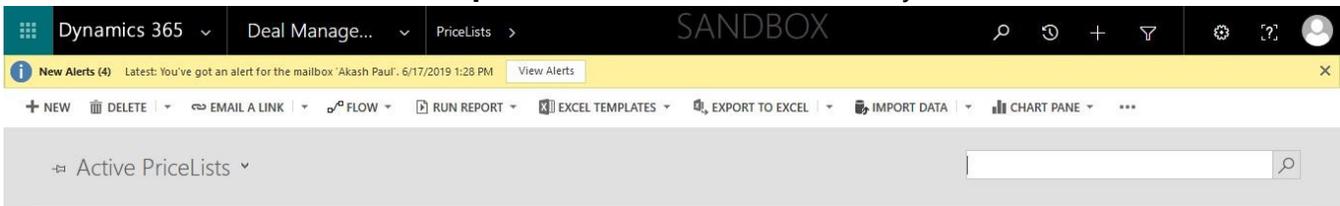
**Product Code:** Any alphanumeric code that identifies the product uniquely.

# Pricelist

User can define the Pricelists for the Products based on the country. Also, can define the same product with different country with different pricelist. Distributor price



- Click on **+NEW** and create a **pricelist** record with the necessary details



**Name:** Give a relevant name for the pricelist. This name will be used as reference in related entities.

**Product Name:** Lookup field to select for which product the pricelist is being created.

**Valid From:** PriceList validity start date.

**Valid To:** PriceList validity end date.

**Country:** Can be same as that of the product country.

**MSRP:** Manufacturer Suggested Retail Price.

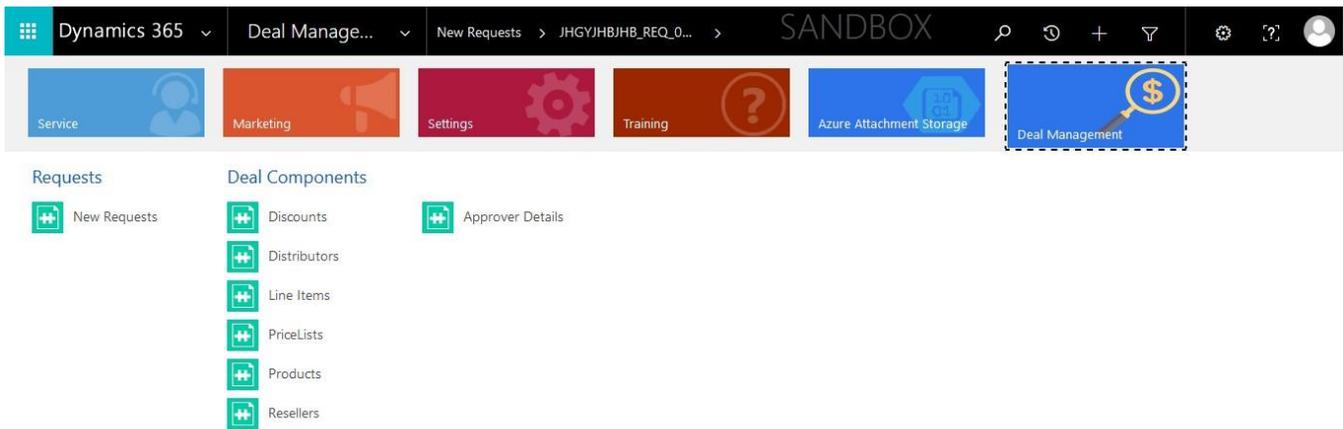
**Distributor Price:** Common distributor price for all distributors.

**Special Pricing:** Yes/No option set value. If request is selected as special pricing, then while creating line item only the pricelists with special pricing (=Yes) will be enabled in the lookup.

**Special Pricing %:** If special pricing is selected yes, then percentage also has to be provided. This discount will be considered when the request type is special pricing.

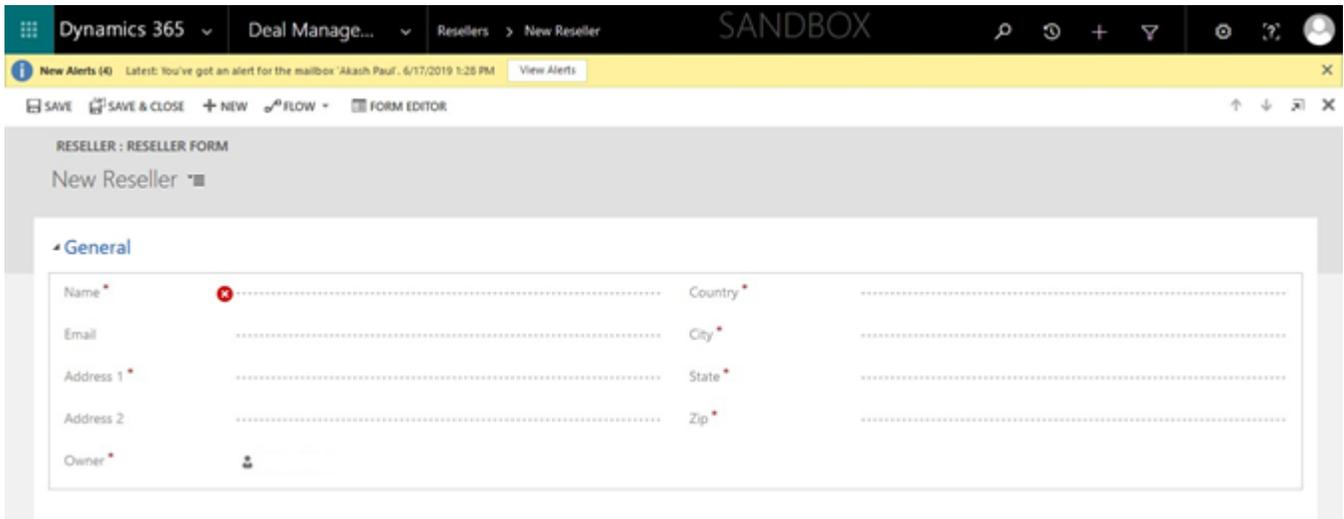
*It is recommended to create two pricelists for a product ; one with special pricing and one without special pricing for better accessibility to the pricelist as the request type*

## Reseller



- Click on **+NEW** and create a **reseller** record with the necessary details





**Name:** Give a relevant name for the reseller. This name will be used as reference in related entities.

**Email:** Email Id of the reseller.

**City:** City of the reseller.

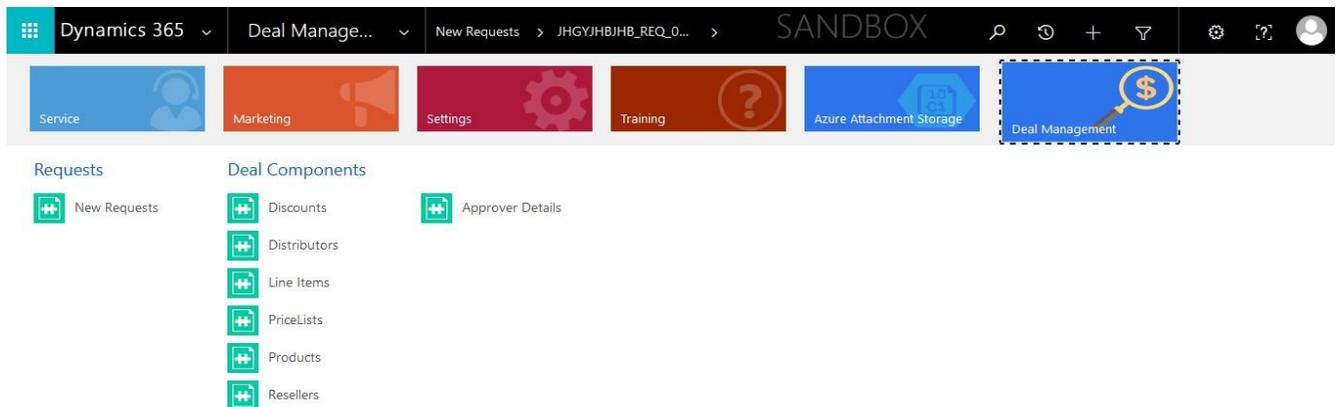
**State:** State of the reseller

**Country:** Country of the reseller.

**Zip:** Zip Code of the reseller.

**Address 1, Address 2:** Addresses of the reseller.

## Distributor



- Click on **+NEW** and create a **distributor** record with the necessary details



**Name:** Give a relevant name for the distributor. This name will be used as reference in related entities.

**Email:** Email Id of the distributor.

**City:** City of the distributor.

**State:** State of the distributor **Country:**

Country of the distributor.

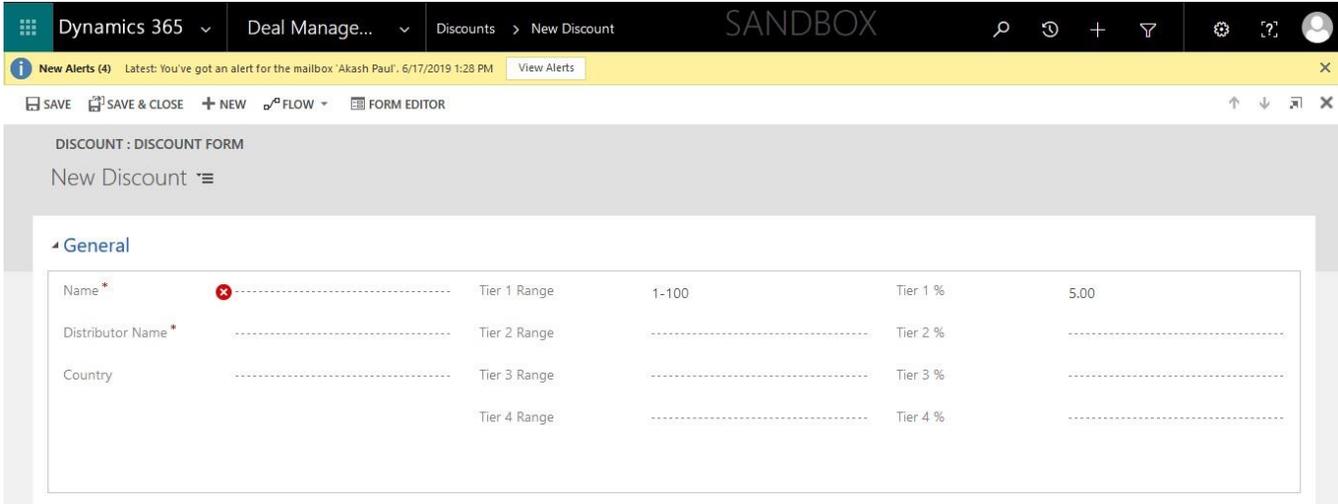
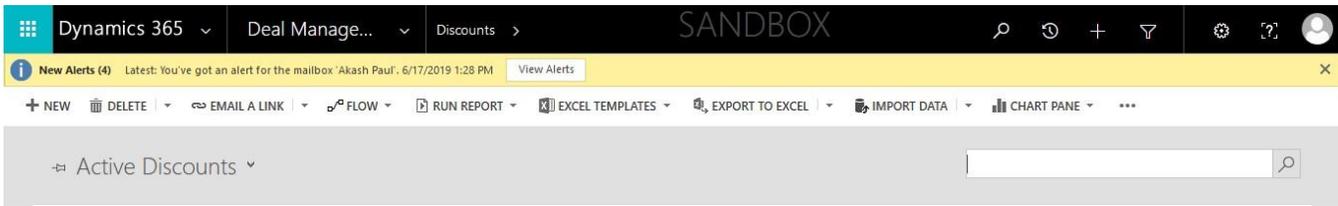
**Zip:** Zip Code of the distributor.

**Address 1:** Addresses of the distributor.

**Phone Number:** Phone number of the distributor.

## Discount

- Click on **+NEW** and create a **discount** record with the necessary details



**Name:** Give a relevant name for the discount record.

**Distributor Name:** Lookup field to select the distributor.

*While a Line Item is created from a request, it will have the distributor which is being selected in the request entity. And while calculating discount in the line item, the discount details will be fetched according to the distributor in the line item and this distributor look up in the discount. If they match, then the discount details of the corresponding record will be considered.*

**Country:** Country of the distributor.

**Tier 1 Range:** This field will store the range of quantity of products to be purchased.

*For example: Enter the range of quantity for discount in (Value-Value) format*

*(e.g. For quantity 1 to 100 type 1-100).*

*Similarly, enter the ranges for **Tier 2 Range, Tier 3 Range.***

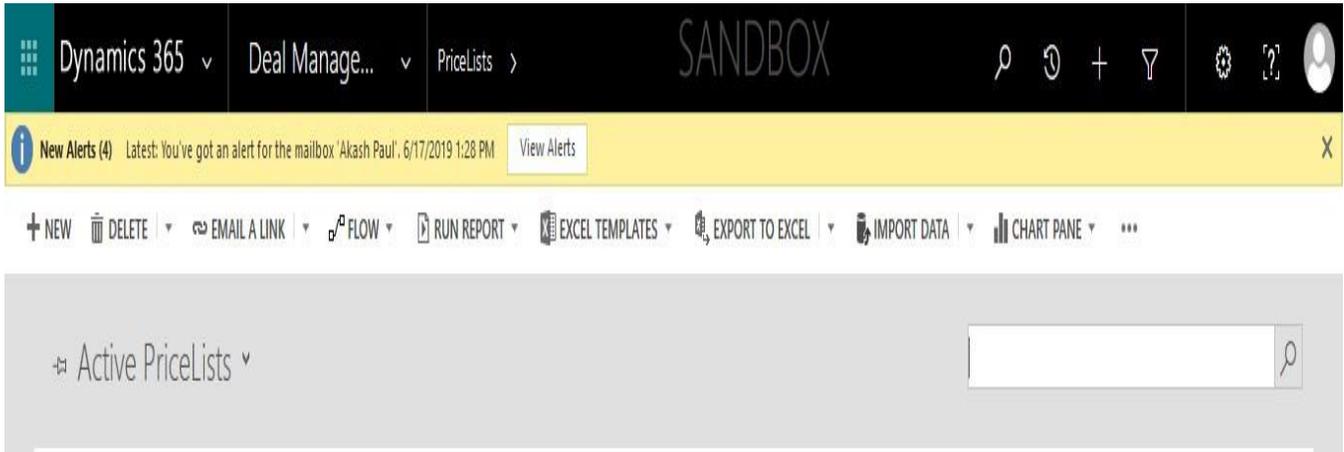
**Tier 4 Range:** For tier 4 range enter only the lower limit.

**Tier 1 %:** Enter the discount percentage for tier 1.

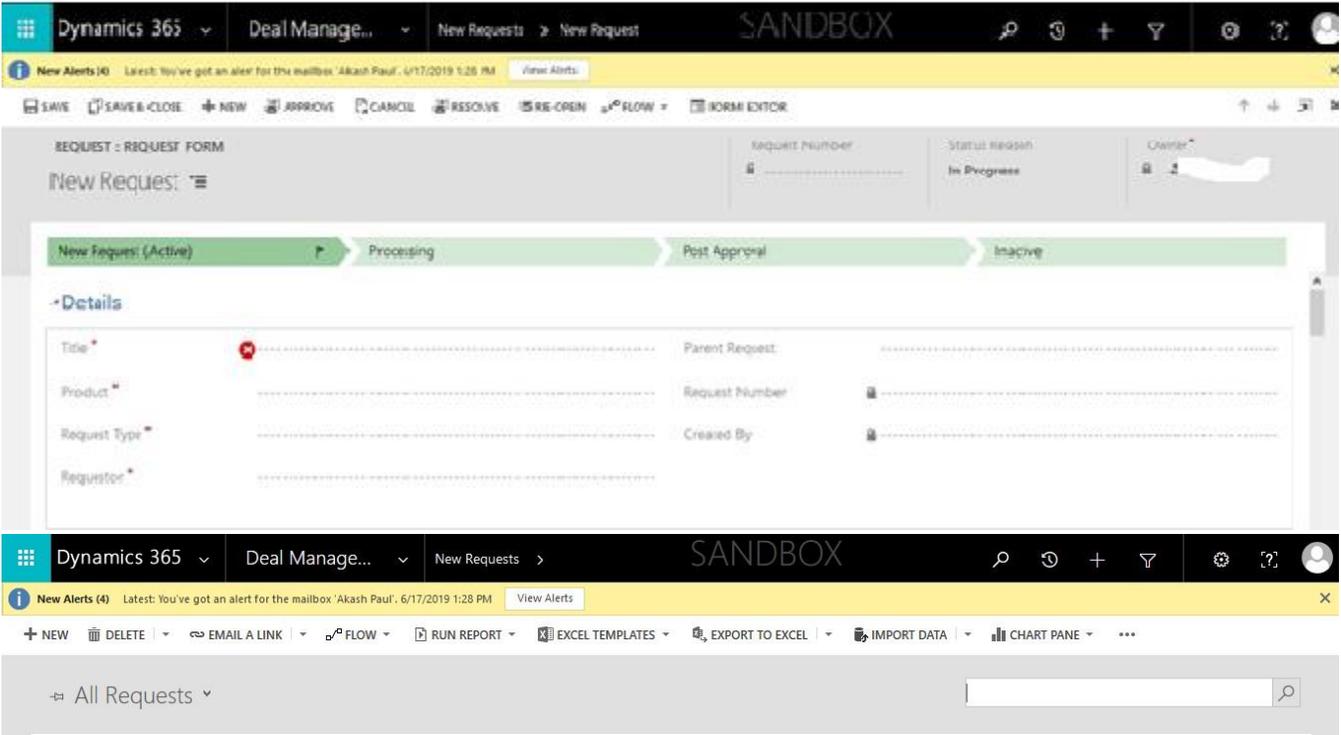
*Similarly, enter the percentages for **Tier 2 %, Tier 3 %, Tier 4 %.***

# Functionality Validation

## Create Request



- Click on **+NEW** and create a **request** record with the necessary details



**Name:** Give a relevant name for the request. This name will be used as reference in related entities.

Once this request is created the title will be updated with the given title appended with the Request Number generated

**Product:** Select the product for which the request is being created.

**Request Type:** Select the request type (Special Pricing/Deal Registration).

**Special Pricing:** This option can be used for the customers, who are eligible for special pricing discounts.

**Deal Registration:** This option can be used for the customers, who only requires deal registration.

**Note:** The pricelists are interlinked with these options.

**Requestor:** State of the requestor. The requestor will be the one who will be asking to create the request.

**Customer Name:** Select the customer who is making the request from the lookup field.

Customer Details	
Customer Name *	Customer Contact Email
Customer Contact Name	Customer Address1
Customer City	Customer Address2
Customer State	Customer Country
Customer Zip	

The field is a lookup for Account entity. The various details in this section will be automatically populated as per contact details of the selected account. **Make sure that the selected account has primary contact otherwise the account will get selected.**

**Reseller:** Select the reseller for the request from the lookup field.

Reseller Details	
Reseller	Reseller Email Id
Reseller Name	Reseller Address1
Reseller City	Reseller Address2
Reseller State	Reseller Country
Reseller Zip	

The field is a lookup for Reseller entity. The various details in this section will be automatically populated as per details of the selected reseller.

**Distributor:** Select the distributor for the request from the lookup field.

Distributor Details	
Distributor*	Distributor Email Id
Distributor Contact Name	Distributor Address
Distributor Phone Number	Distributor State
Distributor City	Distributor Country
Distributor Zip	

The field is a lookup for Distributor entity. The various details in this section will be automatically populated as per details of the selected distributor.

- After filling the above-mentioned details, **save** the form.
- Make sure that at least one Line Item record must be created to move further in process.
- Once the form is saved, the request will get assigned to the **Level 1 Approver** (1<sup>st</sup> level). And an email will be automatically sent to the **Level 1 Approver**.
- If Level 1 Approver wants to **Approve** and send the request for next (2<sup>nd</sup> level) level approval, he/she cannot proceed without creating a **Line Item. Creating a Line Item**

Related Line Items											
Name	Country	Created By	Created On	Distributor Na...	Distributor Pri...	Net Distributo...	Net MSRP	Owner	Price List	Product Quant...	Request
No Line Items found for this Request. Select Add (+).											

- Click on the + button on the **Related Line Items** grid to create a **Line Item**.

**LINE ITEM : LINE ITEM FORM**  
Baretta PriceList 1

**Details**

Distributor Name	AK	Price List	Baretta PriceList 1
Special Pricing	Yes	Title	Baretta PriceList 1
Product Quantity	23	Net MSRP	2,000.00
Country	Canada	Distributor Price	2,200.00
Owner		Total Discount %	13.00
Net Distributor Price	44,022.00		

**Distributor Name:** It will be auto populated from the request entity.

**Special Pricing:** It will be auto populated from the request entity.

**Price List:** Select the price list for the line item from the lookup. The lookup will be filtered according to the **Product** and **Special Pricing** from the request entity.

**Title:** It will be auto populated from the selected price list. It will have the same name as that of the price list selected.

*Once the price list is selected, the fields Net MSRP, Distributor Price will be auto populated from the price list details.*

**Product Quantity:** Give the quantity of products requested by the customer.

**Country:** Country of the customer.

- Once the form is saved, the discounted price will be calculated as per the corresponding discount.
- If the line item is created for a request which **has special pricing**, then the **total discount** applicable is the **sum of the tier range discount and the special pricing discount**.
- If the line item is created for a request which **does not have special pricing**, then the discount applicable is **only the tier range discount**.

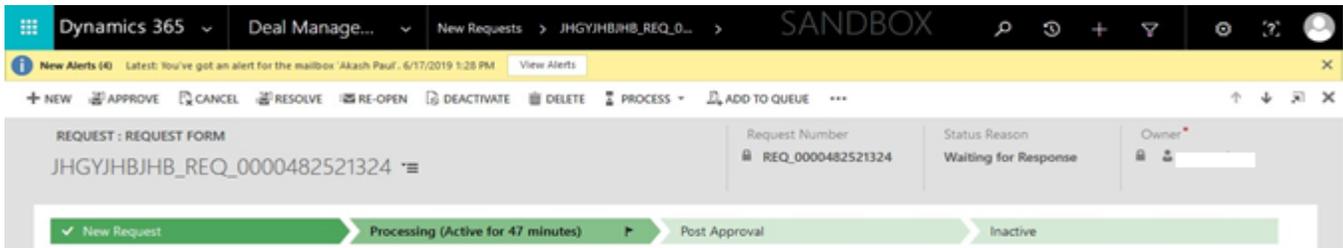
Discount Calculation:

**Net Distributor Price** = **Product Quantity \* Distributor Price \* [1 – Total Discount percentage / 100]**

**Total Discount %:** It will be auto populated with whatever discount is applicable on the line item.

**Net Distributor Price:** It will be auto populated with the final discounted price.

## Approval Process



- When a request is created, it will be assigned to the **Level 1 Approver** and the status reason will change to **In Progress**. If he/she wants to send the request for **Level 2 Approval**, at least online item must be created.
- After **Level 1 Approver** creates a line item and clicks on **APPROVE** button, the request will be assigned to the **Level 2 Approver** and the status reason will change to **Waiting for Response**.
- If **Level 2 Approver** clicks on the **APPROVE** button, the request will be assigned to the **Level 3 Approver** and the status reason will be changed to **Response Received**.
- If **Level 3 Approver** clicks on the **APPROVE** Button, the request will be assigned to the **User** who created the request, and the status reason will change to **Complete**.
- Now, the user who created the request can resolve the request by clicking on the **RESOLVE** button. **This will lock the whole form the form cannot be further updated.**
- In any stage, if any of the approvers cancels the request by clicking on the **CANCEL** button, it will again be assigned to the user who created the request. In that case, the user who created the request can **re-open** the request by clicking on the **RE-OPEN** button, and the request will be re-assigned to the **Level 1 Approver**, and the status reason will again change back to **In Progress**.

## Configuration Email Templates:

Currently the solution has Auto email triggering feature for Create Request, Approval stages and Completing the request.

**Create Request:** Once the request is created auto email will trigger to the requestor alias.

**Approval Stages :** Once the request is created , system will automatically trigger the mail to Approver 1, once the Approver 1 is approved then email will trigger to Approver 2 , this will continue till Approver 3. These emails will trigger to the alias provided in the Approver configuration entity. **Currently we are limiting to this feature to the individual contacts only.** As part of enhanced version release, we are planning to implement this feature for Queues also.

Please find snapshot of the emails:

Request Emails

All Emails							
Subject ↑	From	To	Regarding	Priority	Status Reason	Modified On	
All the Approvals are Completed  REQ_0000933393890 CRM:0048...			iPhones_...	Normal	Sent	7/8/2019 12:13 PM	
Approval Needed REQ_0000933393890 CRM:0048004			iPhones_...	Normal	Sent	7/8/2019 12:11 PM	
Approval Needed REQ_0000933393890 CRM:0048006			iPhones_...	Normal	Sent	7/8/2019 12:13 PM	
Approval Needed REQ_0000933393890 CRM:0048007			iPhones_...	Normal	Sent	7/8/2019 12:13 PM	

1 - 4 of 6 Page 1

Request Emails

All Emails							
Subject ↑	From	To	Regarding	Priority	Status Reason	Modified On	
iPhones_REQ_0000933393890 CRM:0048009			iPhones_...	Normal	Sent	7/8/2019 12:14 PM	
New Request REQ_0000933393890 CRM:0048005			iPhones_...	Normal	Sent	7/8/2019 12:11 PM	

5 - 6 of 6 Page 2

End Users can configure their own email templates in Settings → Templates → Email Templates for their Creation, Approval requests.

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