Discount Management accelerator for Microsoft Dynamics 365 for Sales

USER GUIDE

Version Control	Prepared By:	Reviewed by:	Change
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This user document is valid for the Discount Management accelerator, version *1.0* for Microsoft Dynamics 365 for Sales

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1. **INTRODUCTION**

1.1 **APPLICATION DESCRIPTION**

This accelerator manages the discount rights and approval process of quotations in Dynamics 365 for Sales.

The accelerator allows the business to set discount rates and limits per sales role, allowing the sales person to have flexibility of the discounts they can offer within their limits without the need for approvals. If they want to offer a discount above this, an approval process is triggered automatically for management to allow or disallow the proposed discount.

GOAL OF THE APP

The objective is to speed up the quotation process for the salesperson, and to support business controls in parallel.

2. SETUP & INSTALLATION GUIDE

2.1 SYSTEM REQUIREMENTS

Discount Management accelerator has to be installed on Dynamics 365 for Sales.

To be able to use this functionality your Dynamics 365 CEM license must be up to date. If necessary, contact your reseller for more information about your license.

The product is also available for earlier versions. If you would like the package for other CRM versions, the Consultant should contact the Sales Solution Specialist from the Innovation and Business Solution division at Prodware.

2.2 INSTALLATION

Important: Before any installation and/or modification, you must create a backup of your solution to restore it if you encounter issues with your set-up.
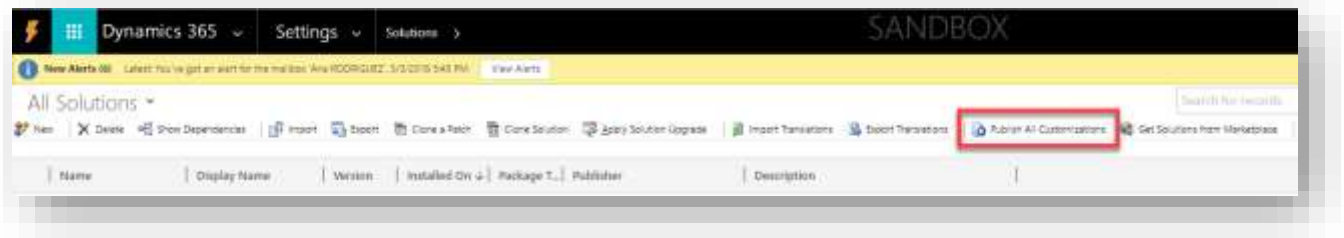
1. Go to Configuration → Solutions:
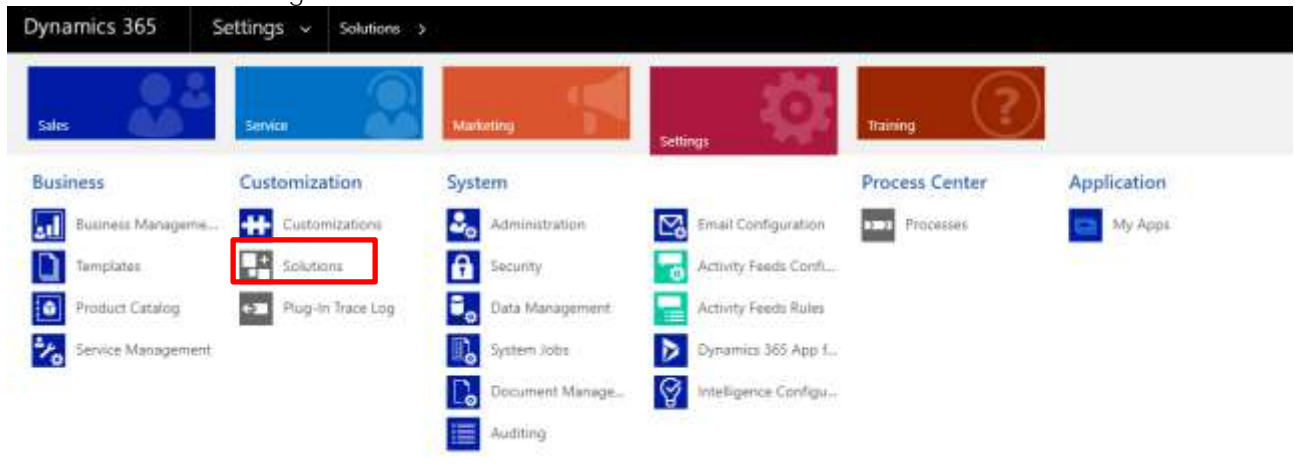
2. Click on "Import", select the discountmanagement_1_0_0_0.zip file and click on "Next", and then "Next":
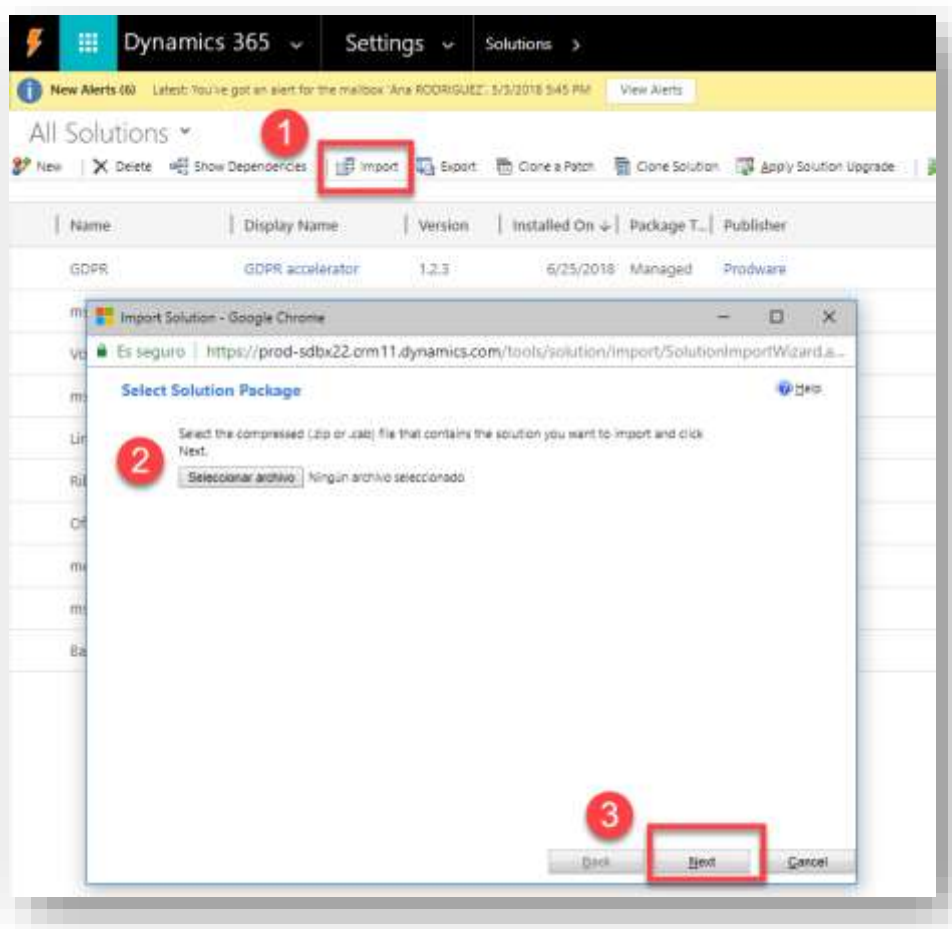
The solution will be uploaded to the CEM environment.

3. Once the solution is uploaded, click on "Publish All Customizations".

2.3 UPGRADING TO A NEW VERSION

Important: Before any installation and/or modification, you must create a backup of your solution to restore it if you encounter issues with your set-up.

When upgrading from a previous version, the actions are the same as for first installation, please refer to chapter 2.2.

All your previous data will be saved and no further action is needed.
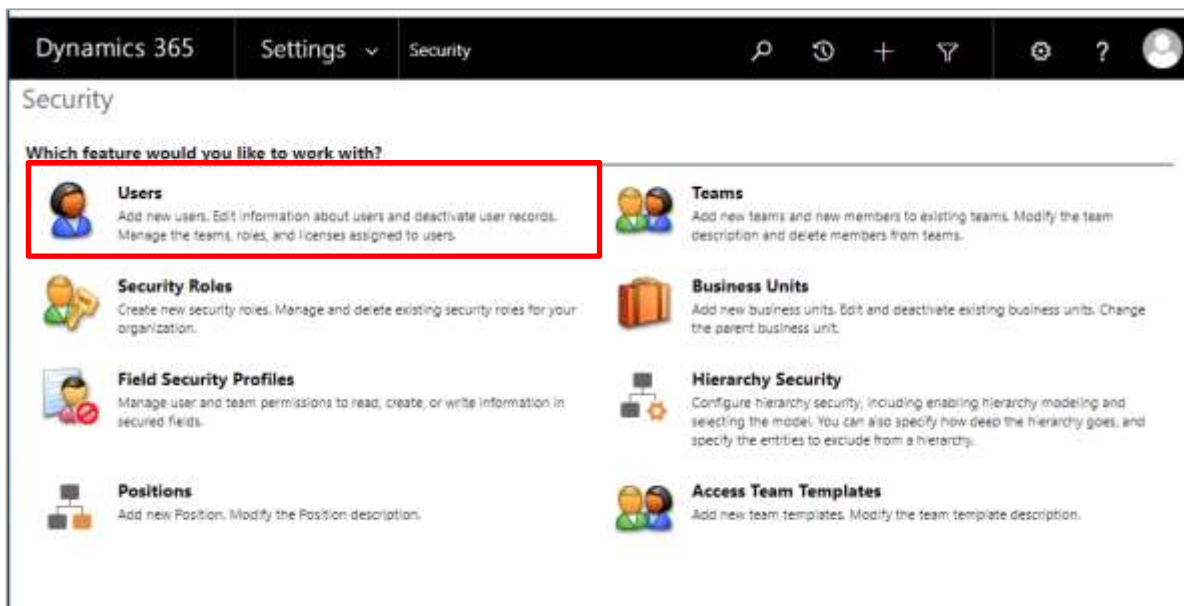
3. FEATURES AND FUNCTIONS FOR USERS

3.1 PROCESS
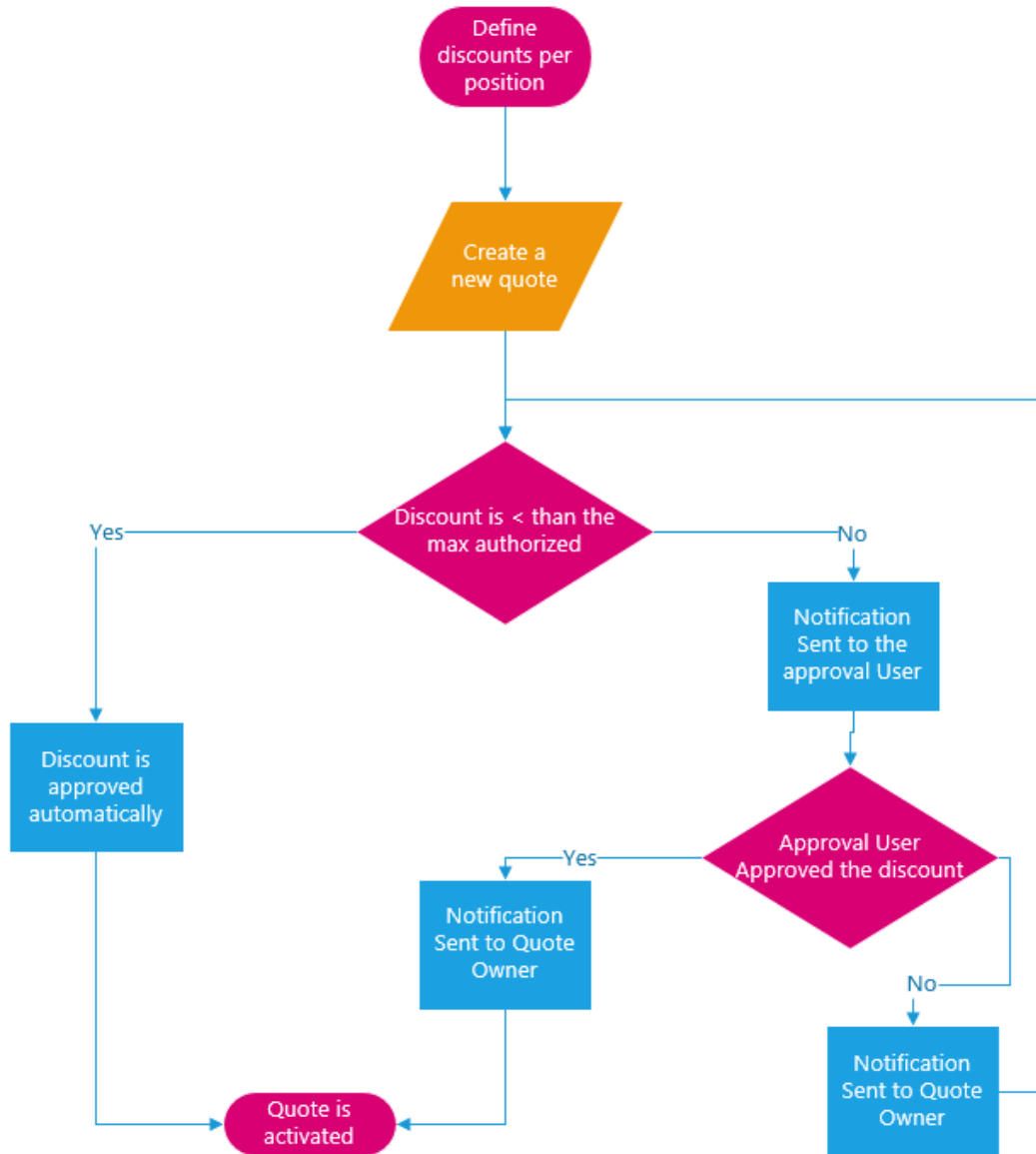
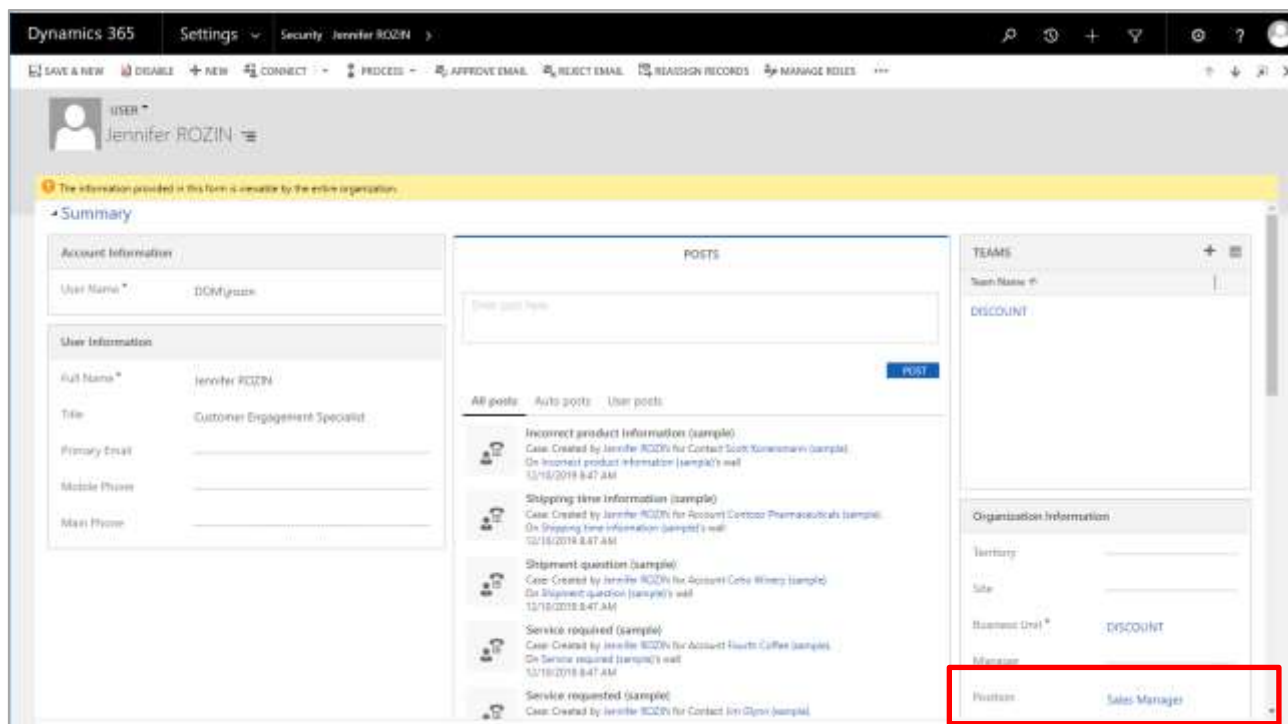### 3.2 ASSIGN POSITION TO USER

> Go to Settings > Security
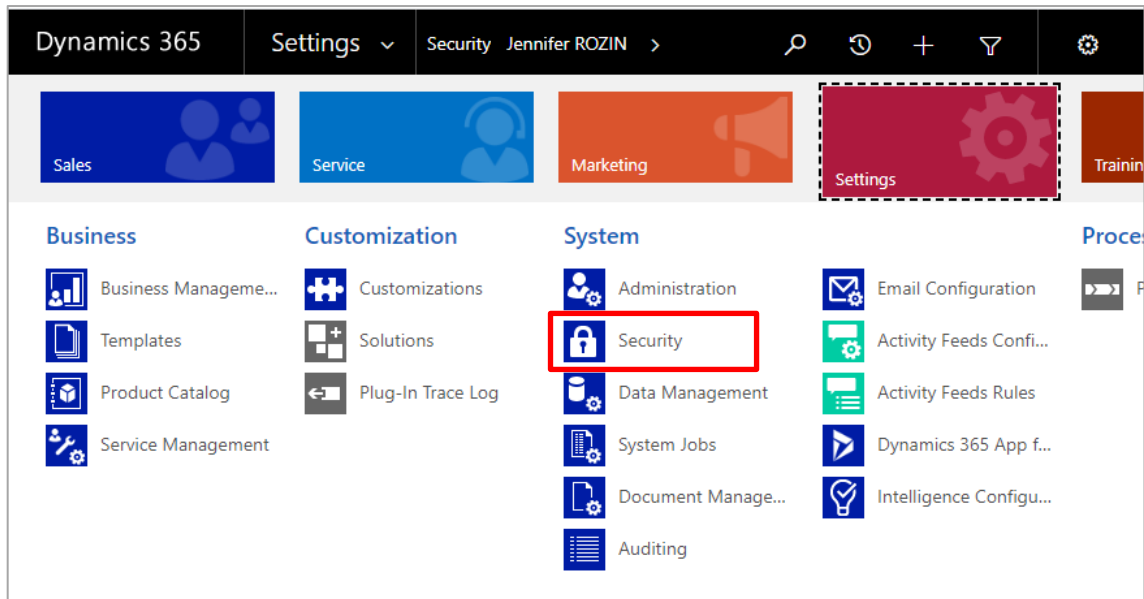
> Select Users

> Open the user
> In Organization Information, Select the position

Note : Usually, only System Administrator Users are enabled to access Users.

3.3 CREATE A NEW DISCOUNT BY POSITION

> Open the Discount Management Hub

> Click on Discounts by Position

> Click New

> Then fill following fields:

  o Max Amount: Discount amount maximum that a user with this position can apply

  o Max Percentage: Percentage of discount maximum that a user with this position can apply

  o Approval User: User that can approve/reject the requested discount

  o Position: Select the position

> Click Save

3.4   CREATE A NEW QUOTE WITH DISCOUNT

> Open the Discount Management Hub

> Click on Quotes

> Click New

> Fill mandatory fields:
  o Enter Name of the quote: Quick description
  o Select Price List

- o Select Potential Customer
> Click Save
> In products grid, click **...** and then Add Product
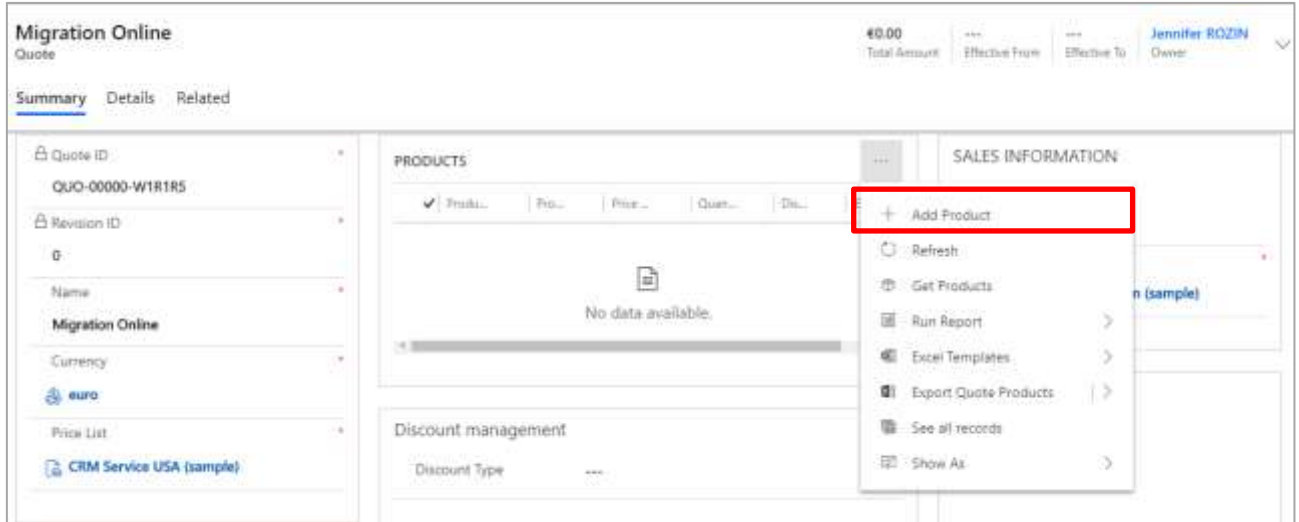
> In Quote Product Form, select the product and enter the quantity. Then click Save.
> In Discount Management Section:
  - o Select Discount Type: Select Percentage or Value:
    - ▪ If the user selected Percentage then Required Discount (%) will appear and will be mandatory
    - ▪ If the user selected Value then Required Discount will appear and will be mandatory
  - o Enter a value into Required Discount (%) or Required Discount
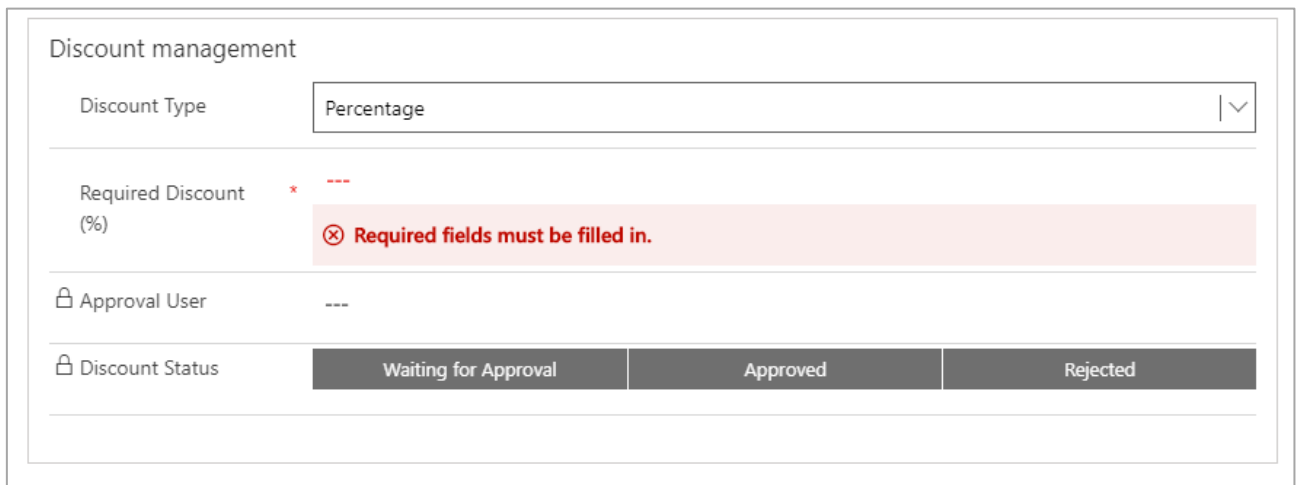
> Click Save

> If Required Discount (%) or Required Discount is lower than the authorized discount (defined in Discount by Position) then the discount is automatically approved.
>
> And the quote can be activated
>
> If Required Discount (%) or Required Discount is greater than the authorized discount (defined in Discount by Position) then:
>
> - o Discount Status is changed to Waiting for approval and becomes Read-only for the quote owner
> - o Approver is populated with the approval user (depending on the Discount by Position)

Discount management

Discount Type	Percentage
Required Discount (%)	* 12.00
Approval User	Jennifer ROZIN
Discount Status	Waiting for Approval / Approved / Rejected

- o A notification is sent to the Approval User. (This notification can be customized **by going to Settings> Processes > Open record** 'Discount Management - Notification on Discount Status Change').
- o The Approval User opens the quote and has two options:
  1. Reject the requested discount:
     - Then the field Rejection Details should be populated
     - A notification will be sent to the quote owner. (This notification can be customized by going to Settings> Processes > Open **record 'Discount Management** - Notification on Discount **Status Change'**)
     - The quote owner can amend the discount and submit it again for approval (after saving)

2. Approve the requested discount:
   - The discount is applied on the Quote
   - A notification will be sent to the quote owner. (This notification can be customized by going to Settings> Processes > Open record '**Discount Management** - Notification on Discount **Status Change**').
   - The quote owner can activate the quote

Note: if the quote is created from the Opportunity then all mandatory fields will be automatically populated.

4. **SECURITY ROLES**

Discount Management includes two security roles:

> Discount Management User: Grant this access to users that will use the Discount Management accelerator

> Discount Management Manager: Grant this security role to users that will configure the Discount Management accelerator