

# Microsoft Dynamics 365 Sales

integrated with COMBINUM

Using the integrated services of COMBINUM and Microsoft Dynamics 365 Sales gives access to powerful features to boost productivity when selling multi-option products.

Often the number of variants through combination of options becomes millions, billions or more. This creates challenges and CRM is not the complete answer.

Adding COMBINUM helps the sales team by making it easy to quote complex products via guided configuration, option based price calculation, automatic generation of quote letters and much more.

In-process Sweden AB, Åsboholmsgatan 6, 504 51 Borås, SWEDEN  
[info@combinum.com](mailto:info@combinum.com), [www.combinum.com](http://www.combinum.com), +46 33 3231211

Gold  
Microsoft Partner  
Application Integration



**Configuration, pricing, and compilation of quote letters for complex products is challenging to do manually. Allowing the integration to streamline these tasks allows for a substantially reduced quote time. As is no secret, this greatly increases your chances of making the sale. With that comes the possibility of using sales resources more effectively and expanding the sales network when deep product expertise is no longer required.**

## Customer Retention

A modern-day dilemma lies in the increased expenses of finding new customers. Therefore, success lies in customer retention. Finding ways to optimize customer experience is increasingly important where structuring communication and product management is central.

*CPQ users improve customer retention by 3.9% annually. Non CPQ-users report a 0.6% decrease.<sup>1</sup>*

## Ensure a Customer Centric Workflow

Customers value speed and high-quality products. With COMBINUM, the system can streamline time consuming tasks. It enhances the CRM system's features through quoting and configuring complex products in an easy and efficient fashion.

This leads to products tailored to customer needs in the most accurate way. The sales rep is guided in selecting the best options via COMBINUM's user interface and rules enforces correctness of the customized product. The personalized processes elevate both your and your customer's experience.

### *What is a CPQ system?*

Configure-price-quote (CPQ) systems are described by Aberdeen Group as *"technology enablers with which selling organizations manage their opportunity-to-order (or lead-to-win) methodology with automated tools that impact the speed and accuracy of developing quotes, proposals, contracts, and products"*.

## Ensure Consistent and Transparent Pricing

When pricing customized products, consistency is key. Aberdeen Group suggests that CPQ users are significantly more adept than non-users in managing pricing and discounting.<sup>2</sup> Consistently enforced and transparent pricing ensures margins and prevents potential problems in orders, while building customer trust.

COMBINUM offers the opportunity to write formulas for calculating prices, formulate hierarchical pricelists, and manage currencies so that pricings are recalculated on-the-fly. It also provides the possibility of having different pricelists for different regions of the world or customer segments.

COMBINUM allows you to set, enforce and automate rules and structures that helps in protecting margins and allows sellers to know pricing limitations without consulting managers.



<sup>1</sup>Peter Ostrow and Nick Castellina, "Maximizing the Sales Technology Ecosystem with Best-in-Class CPQ Deployments", Aberdeen Group, December 2015

<sup>2</sup>Peter Ostrow, "Configure-Price-Quote: Better, Faster Sales Deals Enabled", Aberdeen Group, September 2014



Nothing  
slows down  
momentum like  
avoidable  
errors

### Enhance Quoting

Quoting entails a major part of the sales cycle. It regards pricing, structuring, and describing product features to ensure a correct sale. With an increased product complexity however, the quoting procedure also increases in complexity.

COMBINUM focuses on managing this complexity effectively. By adding COMBINUM to your *Microsoft Dynamics 365 Sales* workflow, the whole quoting process is improved. Quoted products are presented in a tree-structure. This, combined with the embedded rule-engine, saves manual revision time while accuracy and correctness are guaranteed. The rule system controls that only relevant options are possible through specified constraints. They can also be set for a variety of pricing options, so the products' prices stay correct depending on options chosen.

With the CPQ, you can also generate bill of materials and dynamic graphics driven by selected product options, and include these as reports in your CRM system.

The software also supports status and revision management ensuring up-to-date data. With the module COMBINUM Code, it is out-of-the-box possible to transfer the finished quote to other systems in serialized formats like XML and JSON.

### Simplify Product Configuration

Configuring a complex product in the CRM system can easily become overwhelming. To reduce the complexity, sufficient datatypes that intuitively describe the products are required. These datatypes include radio buttons, dropdowns, multiple choice questions, texts, numbers and true/false. COMBINUM implements these making it easier to manage and configure complex products.

Rules and formulas ensure that only allowed options can be combined, only relevant questions are asked and that all mandatory questions have been answered. These rules can be defined completely dependent on the situation.

The integration has a flexible workflow, where each team individually can choose the way in which is best suited for them to work. It also verifies that data is consistent across both software.

*CPQ users reduce sales quote errors 2.6x more efficiently than non-adopters.<sup>4</sup>*

## Simplify Advanced Processes

Using the integrated services are essential if product configuration and pricing is otherwise complex and error prone. Flawed quotes can lead to, not only, poor customer experiences but also an increased workload for the sales team, production, and engineering. The integration of COMBINUM and *Dynamics 365 Sales* provides tools that guarantee correct products and removal of redundant tasks via automation, which supports future scalability for your business.

Considering how important customer retention is in modern day, reducing

overhead for your sales team, reducing risk of inaccuracies, and being able to communicate with the customer quickly will be the key to success. Keeping good relationships with customers will secure your brand as preferred and give opportunities for future sales.

**The sales team will have a consistent, effective structure for pricing and communication, which, along with customer satisfaction, will lead to faster lead-to-win conversion rate and better business.**

