

# Add efficiency in Prospect-to-Cash integration with Sales



# Feature Objective

## **Customer Feedback**

- True end-to-end process integration is needed.
- Achieve efficiency and uniformity in pricing activities.
- Salespeople should not spend time ensuring that data flows between their CE application and the Supply Chain Management back-office environment.

## **Feature details**

- Integrate full end-to-end process integration and prevent Quote and Order creation in isolation
- Make sales quotation and sales order line pricing more transparent and solid.
- Decouple Supply Chain specific activities from Dual-Write sync and achieve more performant integrations

# Prospect to Cash Lifecycle integration

## Business use Case

Quotation/Order life-cycle needs to be fully integrated between platforms. Once a sales quotation/Order has been created, the 2 instances of the quotation should follow the same process and reflect the same status. Additional information kept under SCM should be maintained throughout the entire lifecycle.

## Solution

3 New Features being introduced;

1. Integrate quotation lifecycle
2. Set Ownership for Quotations
3. Copy SCM quotation data to Sales Orders

## New Concept:

Ownership: Can be SCM or Sales. Default ownership can be set based on origin or pre-defined to be either of the applications. Ownership can be changed after record is created under SCM only.

# Demo

Sales Quotation Lifecycle integration

# Use SCM as the price master

## Business use Case

Calculations for quotations/orders should be only sourced from SCM so that totals/sub-totals displayed accurately in both applications.

## Solution

- 2 Alternative approaches here for customers to use based on use case;
  1. SCM to have on demand functionality to push prices into Sales
  2. SCM to be the master of all calculations related to prices, discounts, subtotals and totals.

# Demo

Use SCM as the Pricing Engine / Price Master

# Asynchronous Event Processing

## **Business use Case**

Sales-people should not have to wait for a synchronization event to finalize their tasks.

## **Solution**

Events introduced as part of the new features can be setup to run either synchronously or asynchronously in SCM. These events cover quotation journal creation. Quotation to sales order creation and pricing events.

# Demo

Use SCM as the Pricing Engine / Price Master



# Feature Set

Set default  
Ownership

Copy SCM  
data into  
sales order

Calculate  
and Push  
prices for  
selected  
records

Make SCM  
the price  
Master

Process  
D365 Sales  
integration  
related  
events

Prospect to Cash Life-  
cycle related feature

Price Master Features

Async  
Event  
Processing  
Features

Integrate sales quotation  
life-cycle (Master feature)

Q & A