

CPQ for D365 CRM

Optimize Your Quoting Process with DynaTech's CPQ for D365 CRM

Complex pricing structures and numerous product variations can make accurate quoting a significant challenge. DynaTech's CPQ for D365 CRM, enhanced with AI-powered Copilot capabilities, streamlines the quoting process to help sales teams generate faster, more accurate, and data-driven quotes. With intelligent recommendations and automation, your team can craft compelling proposals with confidence, improving efficiency, productivity, and win rates.



> PRODUCT & CATALOG CONFIGURATION

Feature: Streamline complex product configurations with a centralized catalog integrated into D365 CRM.

Benefit: Improve efficiency, accuracy, and customer satisfaction with up-to-date product data and error-free setups.

> DYNAMIC PRICING & AUTOMATED RULES

Feature: Leverage a rules engine to manage pricing, discounts, and promotions automatically.

Benefit: Deliver consistent, competitive, and error-free pricing across all quotes with minimal manual effort.

> ENGINEERED-TO-ORDER & EPC MANAGEMENT

Feature: Handle complex quoting for customized products and EPC (Engineering, Procurement & Construction) projects.

Benefit: Simplify configuration-heavy and multi-component quotes, ensuring accuracy and faster proposal cycles.

> GUIDED SELLING WORKFLOWS

Feature: Empower sales reps with intelligent, guided workflows for product and configuration selection.

Benefit: Enhance sales efficiency by helping teams recommend the best-fit products and close deals faster.

> SELF-SERVICE CUSTOMER PORTAL

Feature: Allow customers to configure products and request quotes directly via an intuitive web interface.

Benefit: Accelerate the sales cycle, reduce dependency on sales teams, and boost customer engagement.

> ESTIMATE REQUEST & DOCUMENT GENERATION

Feature: Standardize estimate templates and automate document creation with flexible terms, pricing, and schedules.

Benefit: Ensure consistency across departments and deliver professional proposals with minimal manual input.





> CRM & ERP INTEGRATION

Feature: Seamlessly integrate with ERP, eSignature, and payment systems like DocuSign and Stripe.

Benefit: Create a unified quoting and approval process that eliminates silos and improves accuracy.

> DYNAMIC MARGIN & PROFITABILITY CONTROL

Feature: Apply automated margin management rules to maintain profitability.

Benefit: Prevent pricing errors, protect profit margins, and enable data-driven pricing decisions.

> AUTOMATED APPROVALS & WORKFLOWS

Feature: Automate quote reviews, margin checks, and approvals through email, Teams, or mobile.

Benefit: Speed up internal decision-making while maintaining control and compliance.

> CUSTOMER ANALYTICS & INSIGHTS

Feature: Visualize sales and quote performance through Power BI and CRM dashboards.

Benefit: Gain actionable insights into sales trends, customer behavior, and team productivity.

> INVOICING & TERMS MANAGEMENT

Feature: Automate invoice scheduling, apply product-specific and standard terms & conditions, and manage billing rules.

Benefit: Reduce administrative effort and ensure accurate, compliant invoicing and contract management.

> MULTI-CHANNEL & MOBILE QUOTING

Feature: Generate and manage quotes across multiple channels and mobile devices.

Benefit: Extend reach, improve responsiveness, and empower field sales with anytime-anywhere quoting.

Contact DynaTech Today!

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Our Impact in Numbers

450+

In-house
Masterminds

100+

Clients
Worldwide

150+

Dynamics 365
Projects

98%

Client Retention
Rate