

# Configure, Price, Quote 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.



Simplify complex product and pricing configurations in a single platform.



Automate quoting, approvals, and document generation for faster sales cycles.



Improve accuracy, profitability, and customer experience with data-driven insights.

## Key Features



### Product Configuration & Guided Selling

Centralize product catalogs, automate complex configurations, and guide sales reps to recommend the right products with AI-driven workflows.



### Automated Approvals & Document Generation

Standardize templates, automate quote creation, and streamline approvals via email, Teams, or mobile – ensuring faster turnaround.



### Integration & Workflow Automation

Integrate seamlessly with ERP, eSignature, and payment platforms like DocuSign and Stripe to unify quoting, approval, and invoicing processes.



### Dynamic Pricing & Margin Control

Automate pricing, discounts, and margin checks with built-in rule engines to deliver consistent, competitive, and profitable quotes.



### Mobility & Self-Service Experience

Empower sales teams and customers with mobile and web portals to configure, request, and manage quotes anytime, anywhere.



### Analytics & Performance Insights

Leverage Power BI and CRM dashboards for real-time visibility into sales trends, quote performance, and profitability metrics.

## Our Impact in Numbers

**450+**

In-house  
Masterminds

**100+**

Clients  
Worldwide

**150+**

Dynamics 365  
Projects

**98%**

Client  
Retention Rate

## Technology Stack



Microsoft Dynamics 365 CRM



Power Platform (Power  
Automate, Power BI, Power  
Pages)



DocuSign, Stripe Integrations