

Unified Pricing Management Overview

Presenters:

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Liam Kerrigan, Senior FastTrack Solution Architect

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Praveen Jagotra, Senior FastTrack Solution Architect

Tommy Skaue, Senior FastTrack Solution Architect

Yuki Jain, FastTrack Solution Architect

Moderator:

Mathieu Binaisse, Senior FastTrack Solution Architect



Agenda

- What is Unified Pricing Management?
- Key concepts
- Pricing structure
- Price attributes
- Price groups
- Price determination
- Margins
- Discounts
- Charges
- Rebates
- Architecture & API
- Do's and Don't's
- Roadmap
- Q&A

What is Unified Pricing Management?

The background features a dark blue gradient. On the right side, there is a large, light blue semi-circle. In the lower right, there is a white rounded rectangle that overlaps the semi-circle and the dark blue background.

Unified Pricing management



Centrally managed

- Single source to plan, manage, execute and review sales pricing strategy across products, customer and channels
- Provide greater control implementing pricing strategy across the organization



Real-time omni-channel calculation

- Ensure consistency of price and discount calculation across all channels
- Built on top of the Commerce Runtime and deployed within Supply Chain Management, and Commerce Scale Unit (CSU)
- Provides a rich set of APIs for integration



Advanced rule-based engine

- Advanced set of pricing and discount capability, to meet complexities in promotion strategy
- Ultimate control and flexibility using configurable price attributes



End-to-end pricing management solution

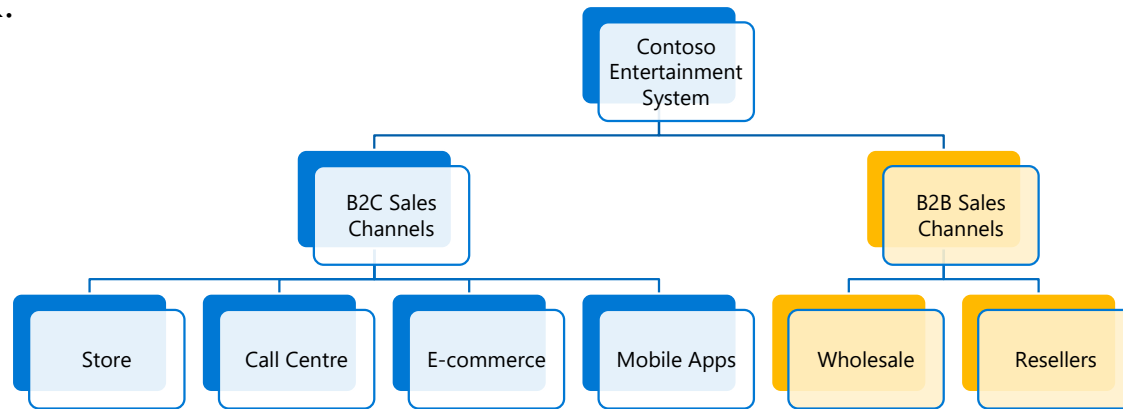
- Manage pricing constructs with vendors to feed sales pricing.
- Apply margins, discounts and charges
- Manage rebates



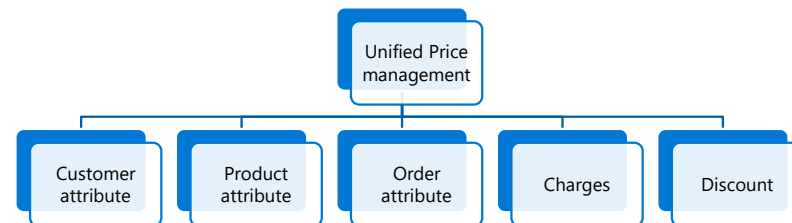
Use Case:
Contoso Entertainment System

Scenario: Contoso Entertainment System

Contoso Entertainment System (CES) is a manufacturer, distributor and installer of **home electronic equipment**. CES operates through physical stores, an online e-commerce platform, and mobile apps, selling directly to consumers worldwide (B2C). They also engage in B2B sales, partnering with hotels and other businesses to supply branded items in bulk.



Unified Pricing Management is governed by channels, customer segments, product categories and order details. Unified Pricing Management helps to deliver strategic pricing based on location, promotions, and the customer's loyalty status, allowing for competitive and consistent offers across all touchpoints.



Use case: Contoso Entertainment System

Use case #1

- Sales price of their speakers belonging to **Techware brand** to be based on the **segment** of the customer (retail/distributor)

Use case #2

- Sales price of the **television** sold to customers to be adjusted based on the **mode of delivery** (truck/air) or based on the **region** of the customer (US west or US east)

Use case #3

- Special discount of 10% to be provided for **television** for **loyalty** customers

Use case #4

- Offer an additional **HDMI Cable** with each **television** purchased by the customer

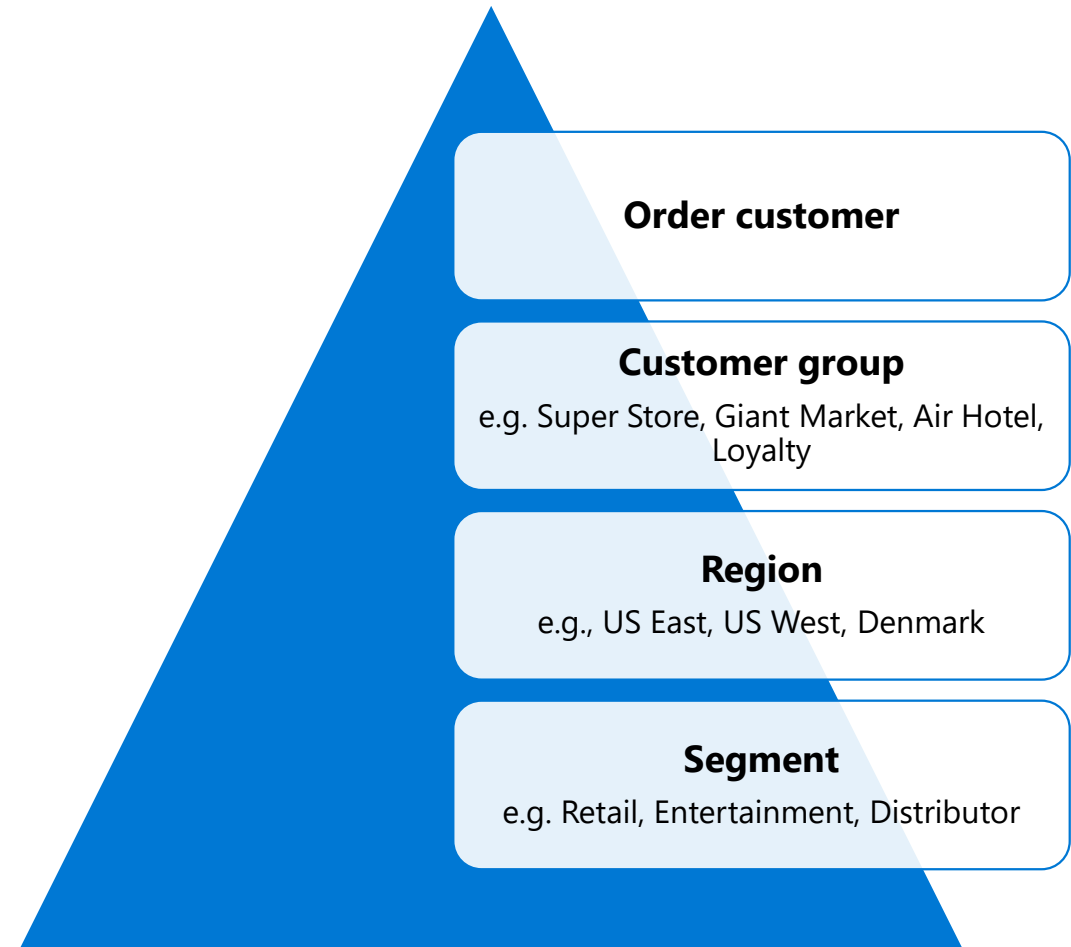
Product Attribute

Customer Attribute

Transaction attribute

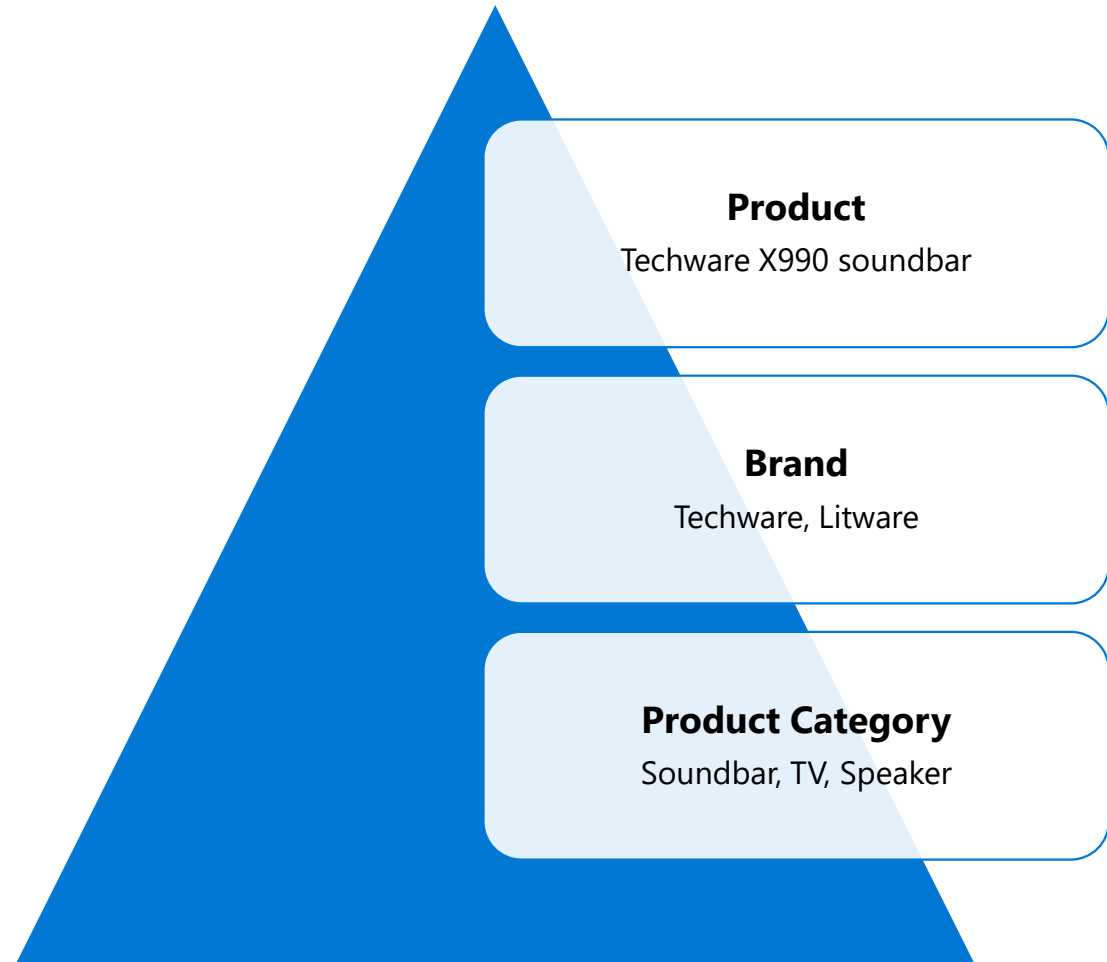
Customer Attribute

Customer attributes used by **Contoso Entertainment System** to determine the price are order customer, customer group, region and segment.



Product Attribute

Product attributes used by **Contoso Entertainment System** to determine the price are product, product category, and the brand.



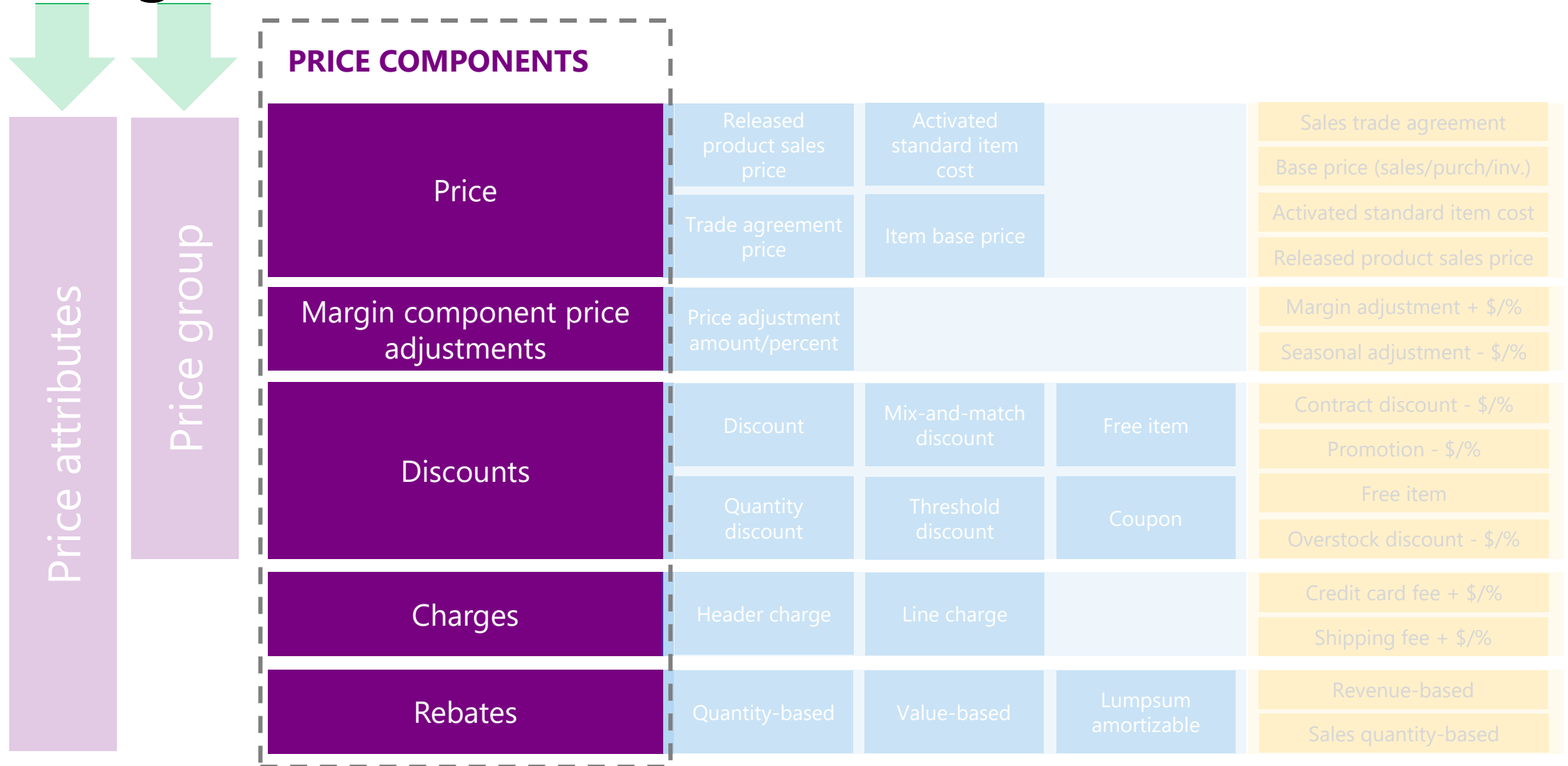
Order Attribute

Order attribute used by **Contoso Entertainment System** to determine the price is method of delivery



Pricing Structure

Pricing structure

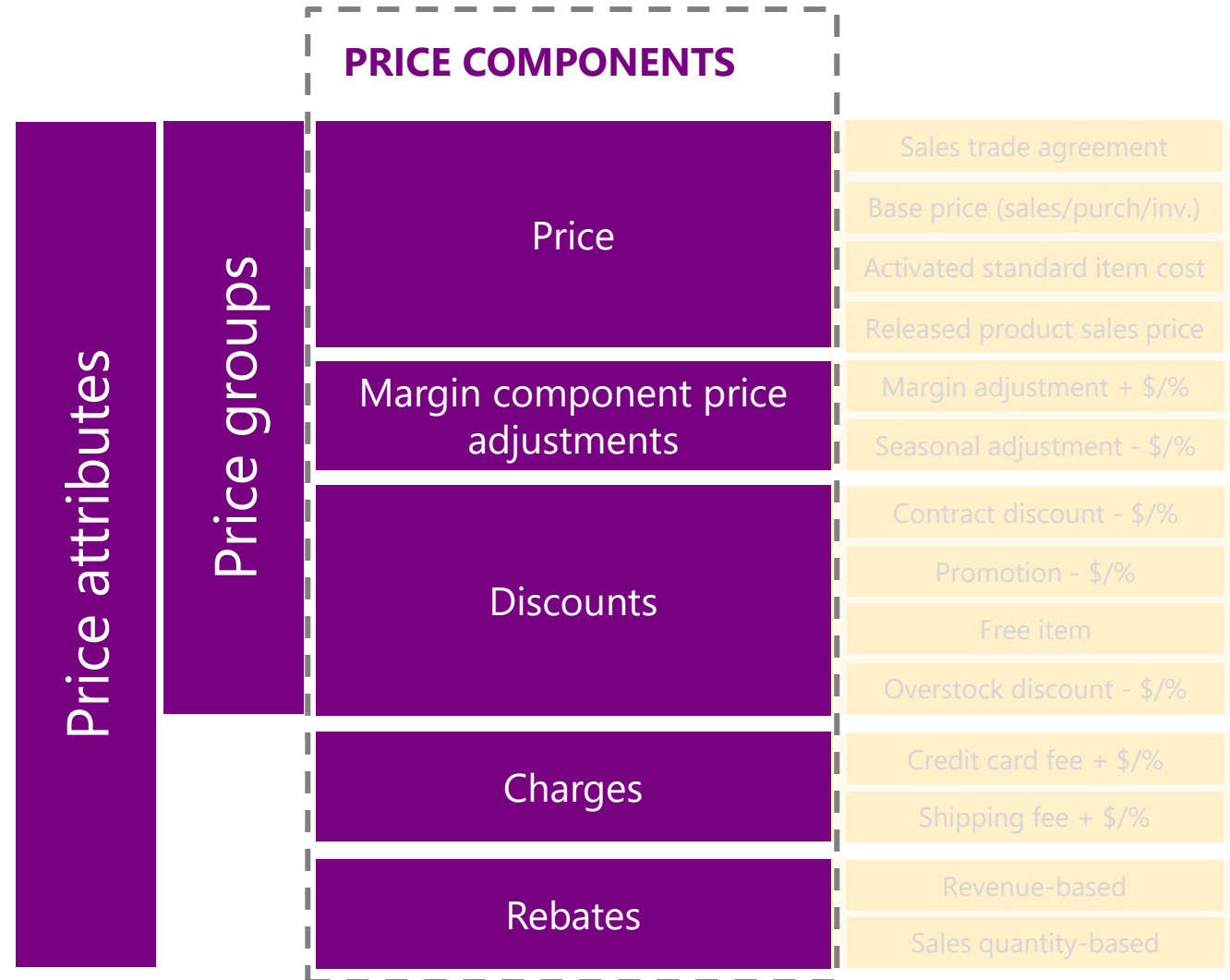




Price attributes

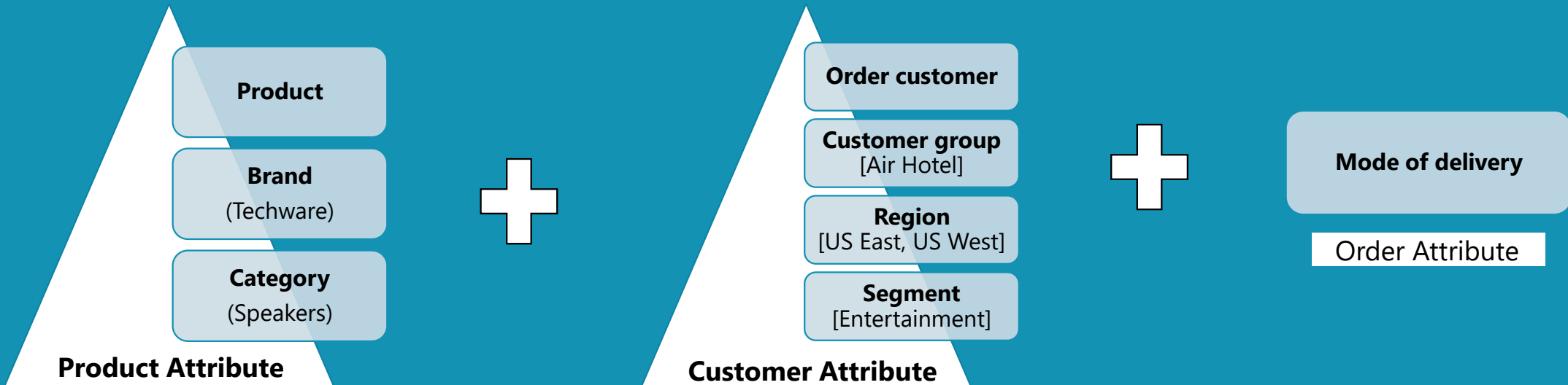
Price attributes

- Flexibility and control
- Leverage information about **customers, products**, as well as **sales order header and lines**
- Works with the customer and product **attribute framework**, making it highly configurable



Demo: Price Attribute

Debra Garcia (Sales Manager) wants the sales price of Speakers belonging to Techware brand sold to Air Hotel group customers to be determined based on the following attributes:



In Dynamics 365 Pricing Management:

- Showcase where the attributes can be defined on the product and customer
- How to setup and activate an attribute group for the product attribute+ customer attribute + order attribute so that it can be used by Contoso Entertainment System in their pricing strategy for pricing, discounts, charges and rebates

- Consolidations
- Cost accounting
- Cost management
- Credit and collections
- Demo data
- Expense management
- Fixed assets
- Fleet management
- General ledger
- Human resources
- Inventory management
- Leave and absence
- Master planning
- Organization administration
- Payroll
- Pricing management
- Procurement and sourcing
- Product information management**
- Production control
- Project management and accounting
- Questionnaire
- Rebate management
- Retail and Commerce
- Sales and marketing
- Service management
- System administration
- Tax
- Time and attendance
- Transportation management



Search people ...

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Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

- Work items assigned to me
- Cash advance request : Record ret...
 - Expense reports : Record returned
 - Catalog : catalog approval
 - Expense reports : Expense report a...
 - Cash advance request : Cash advan...
 - Approve travel requisition
 - Catalog : catalog approval
 - User requests : New user of vendor...

Bank management	Cost analysis	Financial period close	Personnel management	Sales order processing and inquiry
Benefits	Cost control	Fixed asset management	Pricing and discount management	Sales return processing
Budget planning	Customer credit and collections	General journal processing	Product readiness for discrete manufacturing	Store financials
Business document management	Customer invoicing	Invoicing	Product readiness for process manufacturing	Store management
Business processes for human resources	Customer payments	Learning	Product variant model definition	System administration
Business processes for payroll	Data management	Leave and absence	Production floor management	Task management
Cash overview - all companies	Data validation checklist	Ledger budgets and forecasts	Project management	Vendor bidding
Cash overview - current company	Distributed order management	Maintenance request management	Purchase order confirmation	Vendor information
Catalog management	Electronic reporting	Master planning	Purchase order preparation	Vendor invoice automation

- Home
- Favorites
- Recent
- Workspaces
- Modules
 - Accounts payable
 - Accounts receivable
 - Asset management
 - Audit workbench
 - Budgeting
 - Cash and bank management
 - Common
 - Consolidations
 - Cost accounting
 - Cost management
 - Credit and collections
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 - Expense management
 - Fixed assets
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 - Procurement and sourcing
 - Product information management
 - Production control
 - Project management and accounting

- Expand all Collapse ...
- Pre-sales pricing
 - Vendor price term codes
 - Vendor price term agreements
 - Vendor list price
 - Base price versions
 - During-sales pricing
 - Sales trade agreement price
 - Trade agreement journals ★
 - Price adjustments
 - Margin component price adjustments
 - Discounts
 - Charges setup
 - Price simulator
 - Discount claims
 - Fund control
 - Inquiries and reports
 - Periodic tasks
 - Setup
 - Pricing management parameters
 - Price attribute groups
 - Price attribute groups ★
 - Customer price attribute groups
 - Product price attribute groups
 - Vendor list price groups
 - Price component codes
 - Price component codes ★
 - Price component code groups
 - Price component code setup ★
 - Price trees
 - Trade agreement prices
 - Smart rounding
 - Trade agreement journal names

- Posting
 - Pricing component posting
 - Discount claim posting

Attribute type	Attribute source	Rank
xt	SalesTable	5
xt	Customer	4
xt	Customer	3
xt	Customer	2
xt	Customer	1

- Cost accounting
- Cost management
- Credit and collections
- Demo data
- Expense management
- Fixed assets
- Fleet management
- General ledger
- Human resources
- Inventory management
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- Sales and marketing
- Service management
- System administration
- Tax
- Time and attendance
- Transportation management
- Vendor collaboration
- Warehouse management



Contoso Consulting USA

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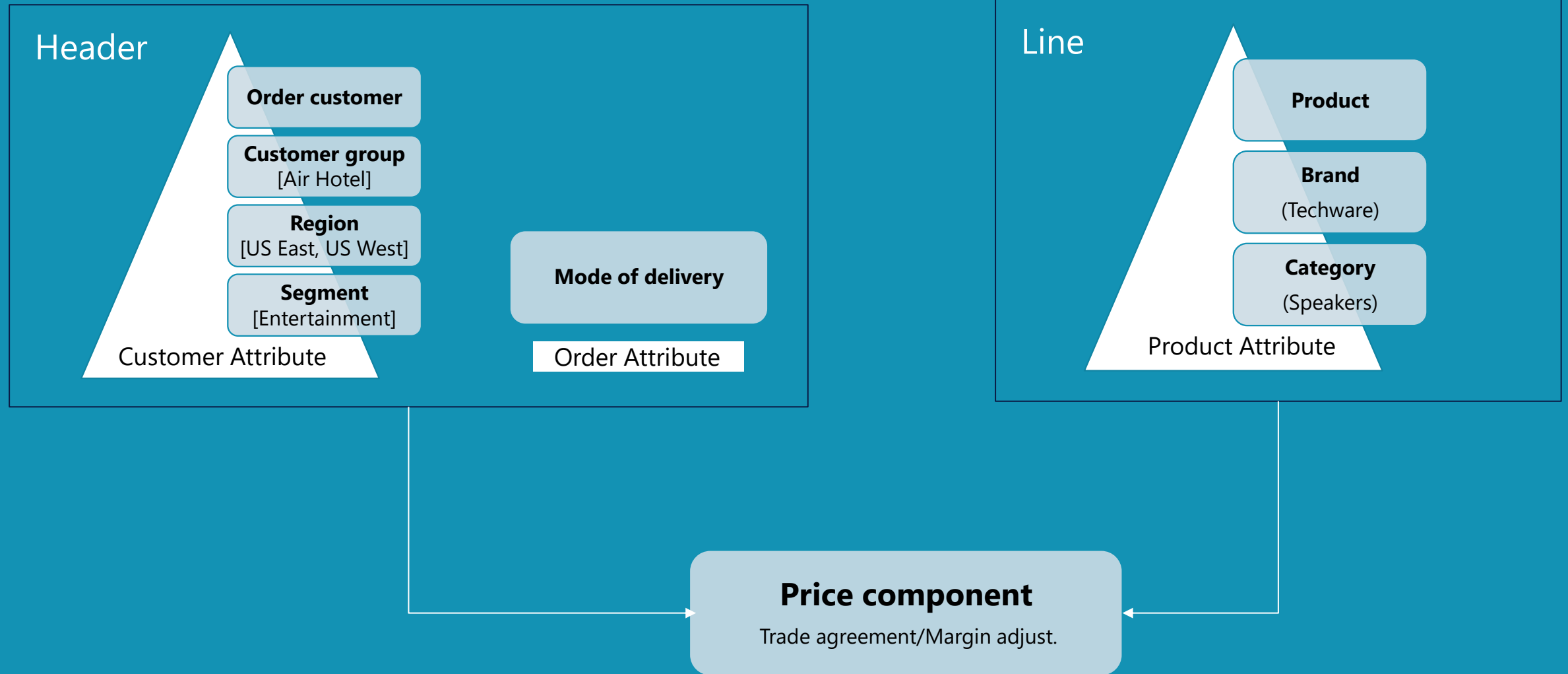
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11	12	13	14	15	16	17
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Price Attribute Demo – Summary



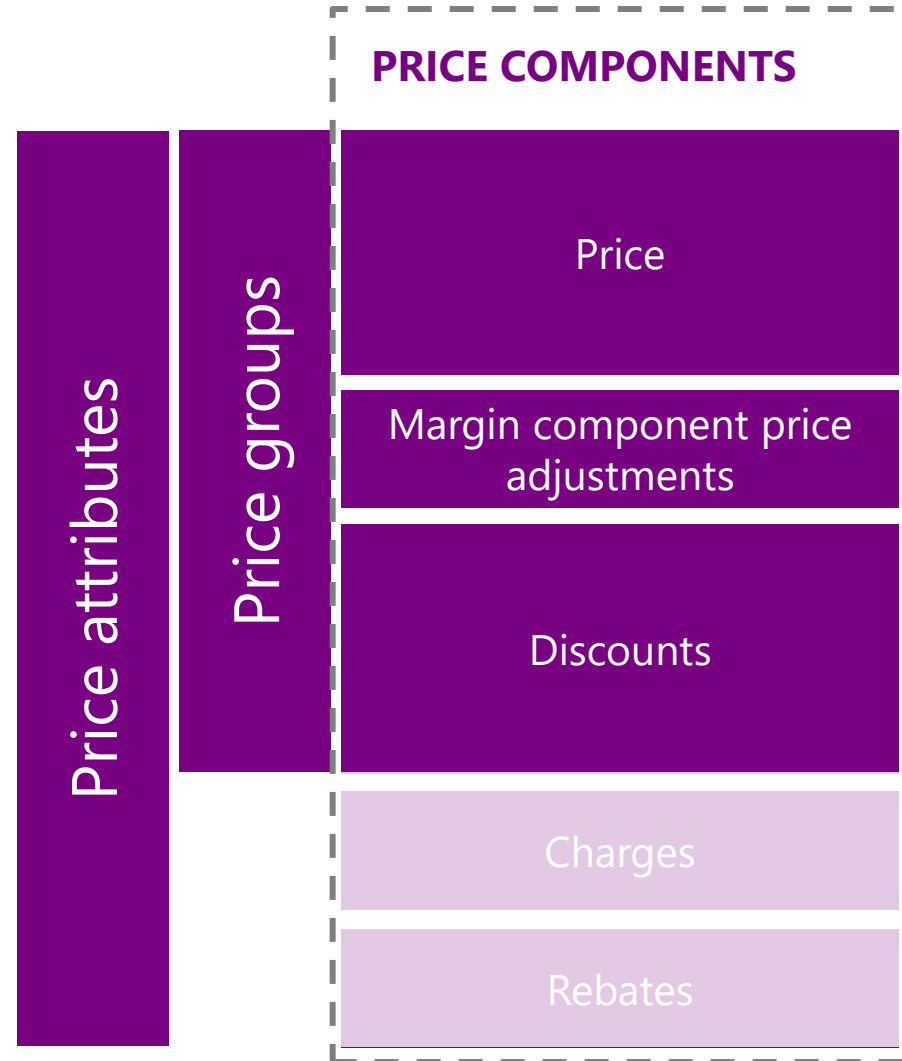
Note: We can also have a transaction attribute from the order line

Price Groups



Price Groups

- **Price groups** logically group pricing header attributes and in the future line attributes across SCM and Commerce. Price groups are optional.
- **Strategic Flexibility:** Price groups support adaptable pricing strategies for both B2B and B2C, enabling a consistent approach across different customer segments and business models
- **Product Discounts:** Apply discounts to product within a group, streamlining promotions.
- **Channel Pricing:** Easily tailor pricing strategies to various sales channels (online, physical stores, apps), ensuring a unified customer experience across different touchpoints.
- **Affiliations & Loyalty:** Enable special pricing for targeted customer groups, loyalty members, and affiliates, enhancing customer retention and engagement.



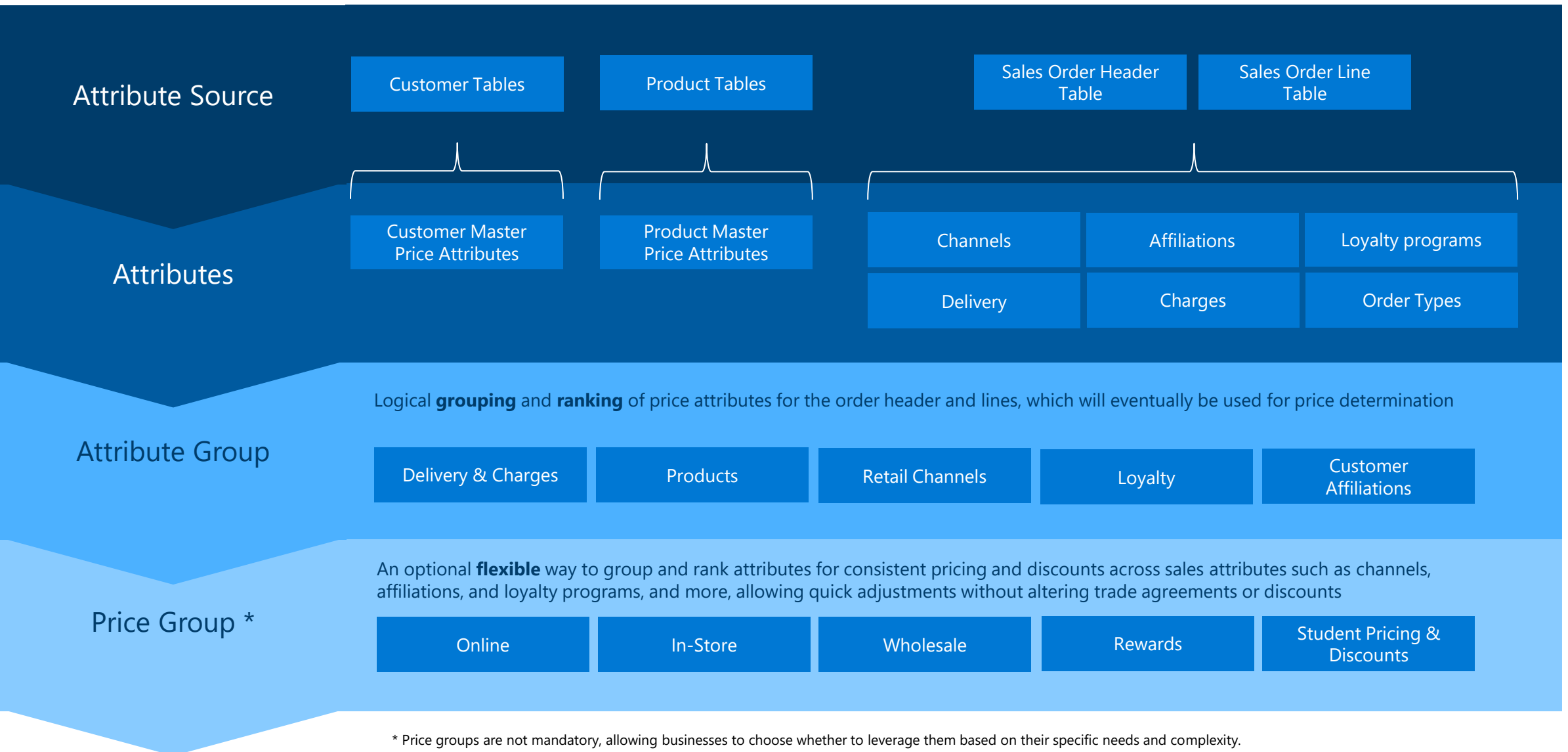
Price groups & attributes unified

Unified Pricing Capabilities: Unified pricing integrates multiple pricing attributes, such as channels, affiliations, loyalty programmes, and catalogues into logical price groups.



* Available in Enhanced Pricing. 10.0.43 +

Bringing Price Attributes Together with Price Groups



* Price groups are not mandatory, allowing businesses to choose whether to leverage them based on their specific needs and complexity.

Demo: Setup for Channel Specific Pricing

Contoso Entertainment System (CES) has adopted a channel-specific pricing strategy to address varying operational costs and customer expectations across sales channels.

- **Online Store:** The 52" LCD HD TV is priced at **\$900** to appeal to cost-sensitive customers, reflecting lower overhead costs.
- **In-Store:** The same TV is priced at **\$950**, accounting for the in-person shopping experience, higher operational costs, and customer service.

Using **Unified Pricing** and **Price Groups**, CES can easily manage and adjust prices across channels, ensuring consistent pricing logic without disrupting the core pricing structure, all while maintaining profit margins.

Price Group	Channel (Channel Attribute)	Item Number (Product Attribute)	Price
Online Stores	000033	3107	\$900
In-Store	000001,000002,000004	3107	\$950

- Home
- Favorites
- Recent
- Workspaces
- Modules

- Accounts payable
- Accounts receivable
- Asset management
- Audit workbench
- Budgeting
- Cash and bank management
- Common
- Consolidations
- Cost accounting
- Cost management
- Credit and collections
- Engineering change management
- Expense management
- Fixed assets
- General ledger
- Human resources
- Inventory management
- Landed cost
- Leave and absence
- Master planning
- Organization administration
- Payroll
- Pricing management**
- Procurement and sourcing



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22	23	24	25	26	27	28
29	30					

Work items assigned to me

Work items will be displayed here after they are assigned to you.

APPS

- Business performance analytics (preview)
- Business performance planning
- Copilot for Finance (Preview)
- Demand planning
- Human Resources
- Invoice capture

WORKSPACES

- Bank management
- Compensation management
- Employee development
- Leave and absence
- Product readiness for discrete manufacturing
- Sales return processing
- Benefits
- Confirmed purchase orders with changes
- Employee self service
- Ledger budgets and forecasts
- Product readiness for process manufacturing
- Store financials
- Budget planning
- Cost accounting ledger administration
- Engineering change management
- Maintenance request management
- Product variant model definition
- Store management
- Business document management
- Cost administration
- Expense management
- Master planning
- Production floor management
- Supply risk assessment
- Business processes for human resources
- Cost analysis
- Feature management
- My business processes
- Project management
- System administration
- Business processes for payroll
- Cost control
- Financial analysis - all companies
- Optimization advisor
- Purchase order confirmation
- Task management
- Cash overview - all companies
- Customer credit and collections
- Financial analysis - current company
- Outbound work monitoring
- Purchase order preparation
- Vendor bidding
- Cash overview - current company
- Customer invoicing
- Financial period close
- Outbound work planning
- Purchase order receipt and follow-up
- Vendor information

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- Pricing management**
- Procurement and sourcing

Filter

- Auto charge header**
Auto charge header
- Auto charge line**
Auto charge line
- Customer**
Customer
- Customer Affiliations**
Customer Affiliations
- Loyalty**
Loyalty
- Product**
Product
- Retail Channels**
Retail Channels

Standard view

Price attribute groups

Price attribute group: Retail Channels Validated: Yes

General

Friendly name	Description	Help text	Sales order matching scope
Retail Channels	Retail Channels		Header

Attributes

+ Add Remove Move up Move down

Name	Attribute type	Attribute source	Rank
Retail Channel Id	Text	SalesTable	1



Price Determination

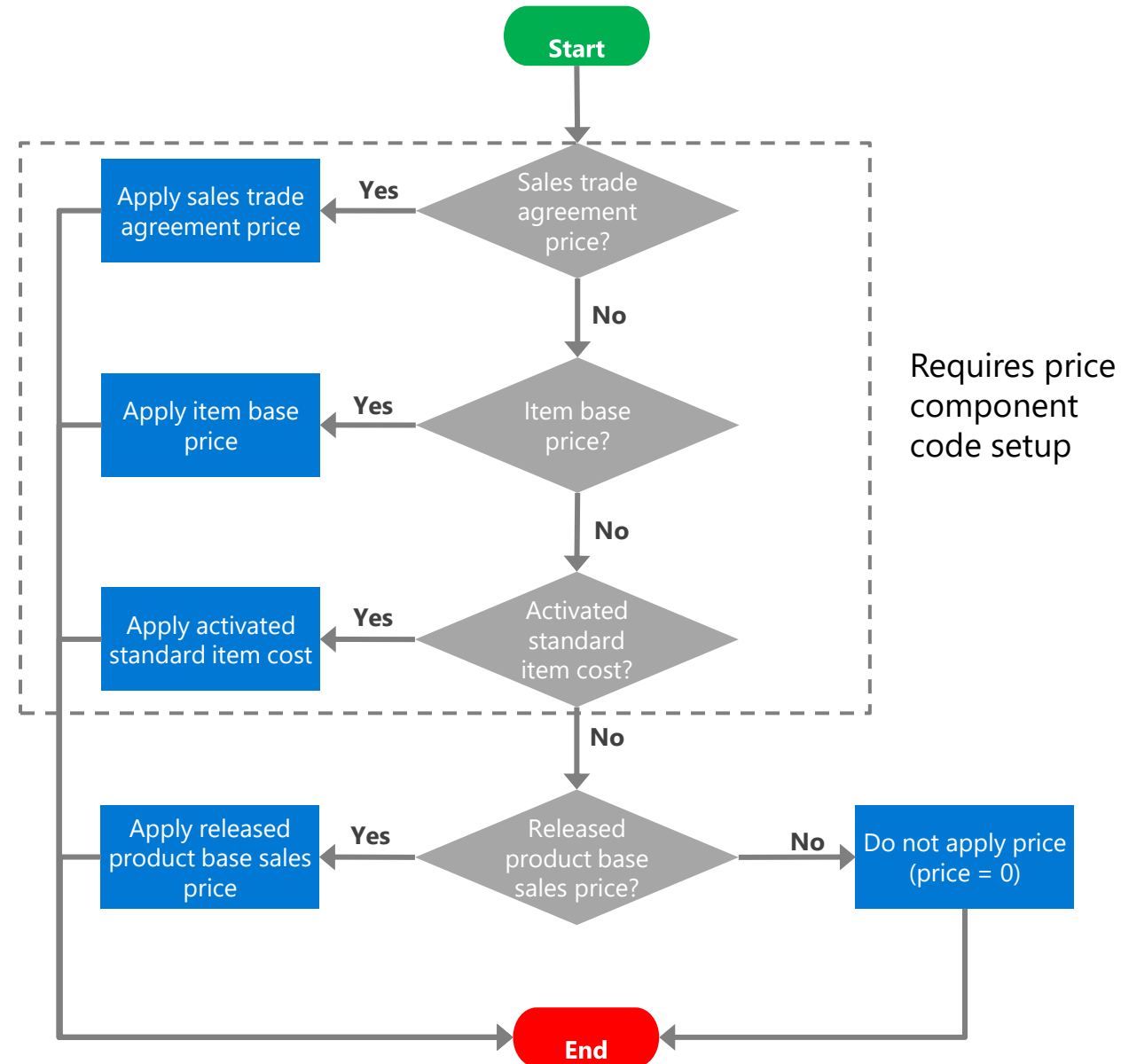
Price determination

- Multiple methods available to determine the price of an order before adjustments, discounts and charges



Price determination

- The starting price can be sourced from:
 - Trade agreement price
 - Item base price
 - Activated standard item cost
 - Released product default sales price
- Searched for in a set sequence, and stops searching when a price is found
- Price component code setup is required for all price types, except the release product base sales price



Demo: Price simulation for Channel Specific Pricing

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- Cash and bank management
- Common
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- Production control
- Project management and accounting
- Questionnaire
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- Retail and Commerce
- Sales and marketing
- Service management
- System administration

Filter

- FABPRC01
Fabricom Rewards Pricing
- ONLPRC01
Online Store Pricing
- STRPRC02
In-Store Pricing**
- STUPRC01
Student Pricing & Discounts

Standard view

All price groups

Price group	Name	Rank
STRPRC02	In-Store Pricing	10

Conditions

Price attribute group: Retail Channels

Name	Value
Retail Channel Id	000001,000002,000004


Enable multiple selections: Yes

Trade agreement lines

Relation	Header price attribute group	Price attribute detail	Line price attribute group	Price attribute detail	Allow price adj...	Allow unit con...	Price/discount journal nu...
Price (sales)			Product	position; Page; Addon; Item number: 0006; Categ...			PDJ-00216
Price (sales)			Product	position; Page; Addon; Item number: 0004; Categ...			PDJ-00216
Price (sales)			Product	position; Page; Addon; Item number: 0004; Categ...			PDJ-00116
Price (sales)			Product	position; Page; Addon; Item number: 0004; Categ...			PDJ-00142
Price (sales)			Product	position; Page; Addon; Item number: 82001; Cate...			PDJ-00165
Price (sales)			Product	position; Page; Addon; Item number: 0004; Categ...			PDJ-00190

Price adjustments

+ Add Remove

Price adjustment	Name	Discount type	Discount concurrency mode	Override priority	Pricing priority	Header price attribute group	Price attribute detail
 We didn't find anything to show here.							

- Home
- Favorites
- All price groups
- All stores
- Price attribute groups
- Price simulator
- Retail and Commerce IT
- Trade agreement journals
- Workers
- Recent
- Workspaces
- Modules

Trade agreement journals

Standard view

Filter Not posted

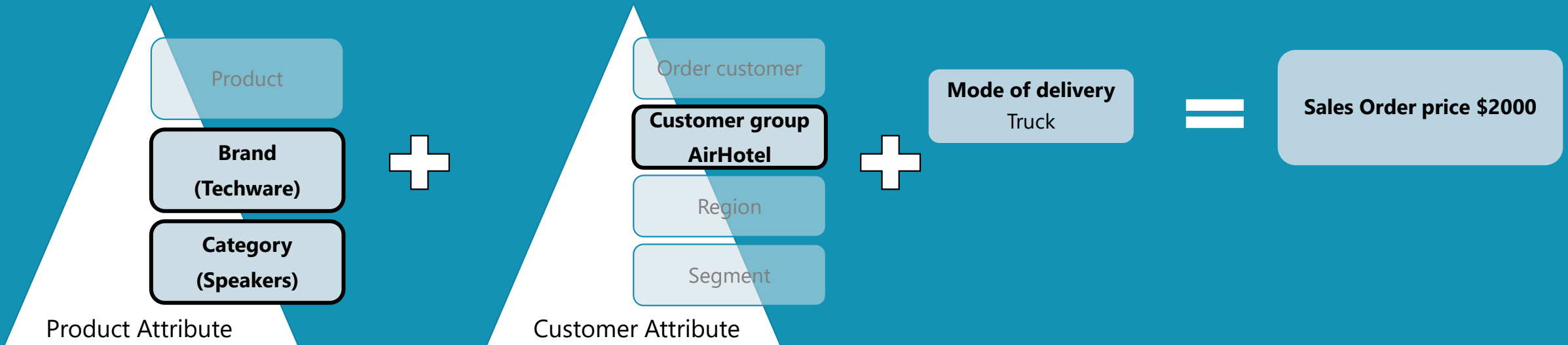
Name	Price/discount journal number	Description	Posted	Posted on	Default relation	Export current ...	Price group	Price attribute group combination	Allow price adj...	Enable price at...
					Price (purch.)					



Attributes based pricing

Demo: Sales order Pricing

Debra Garcia(Sales Manager) wants the sales price of Speakers belonging to Techware brand to be priced at \$ 2000 for all Air Hotel customer group requiring delivery by truck.



In Dynamics 365 Pricing Management:

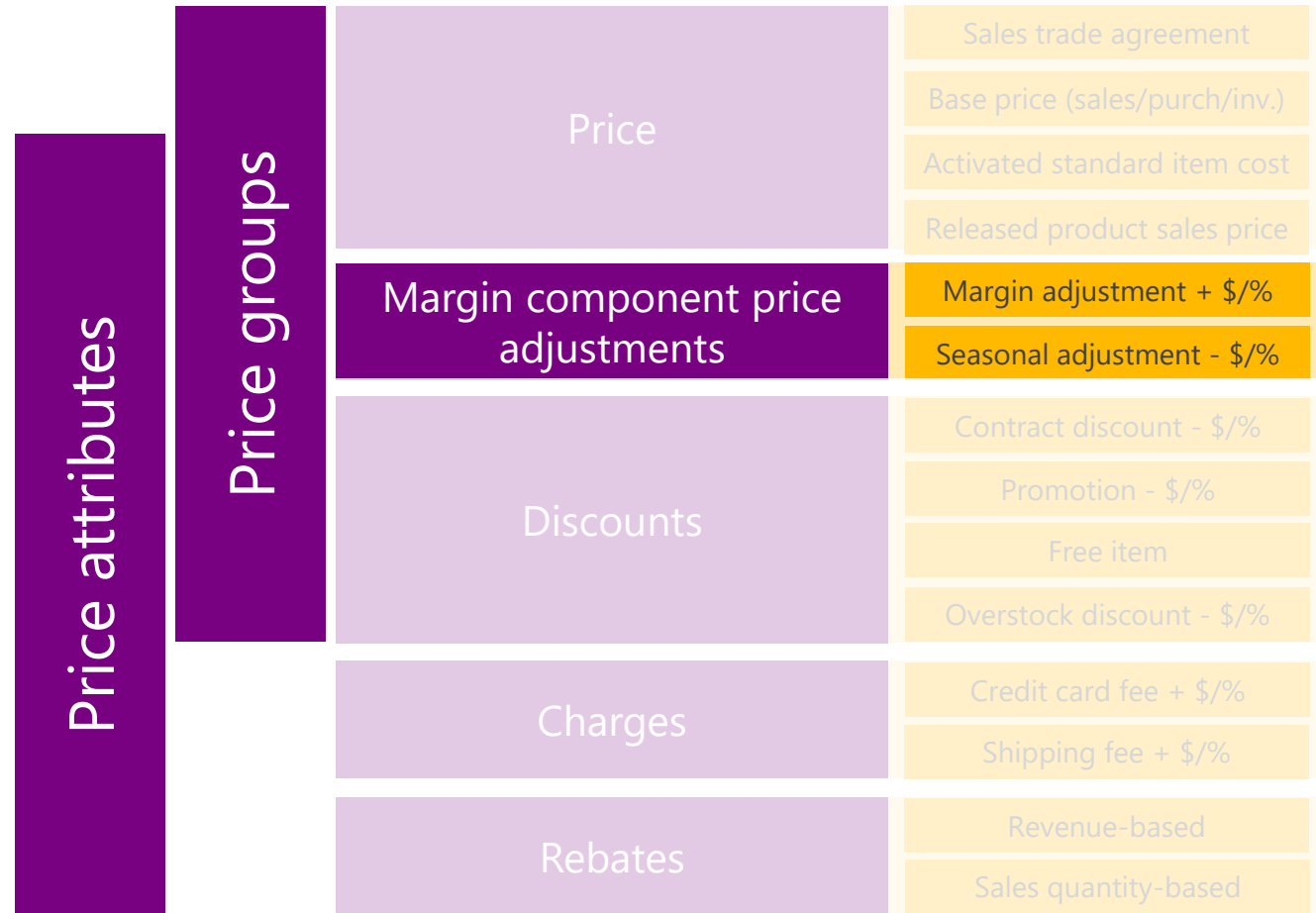
- Create a trade agreement journal with product attribute (Techware Brand & Speaker Category) + customer attribute (Air Hotel Customer group)+ order attribute (Truck mode of delivery) for \$ 2000
- When a sales order is created and the attributes match with the values in the trade agreement journal, the sales price should be 2000\$



Margin

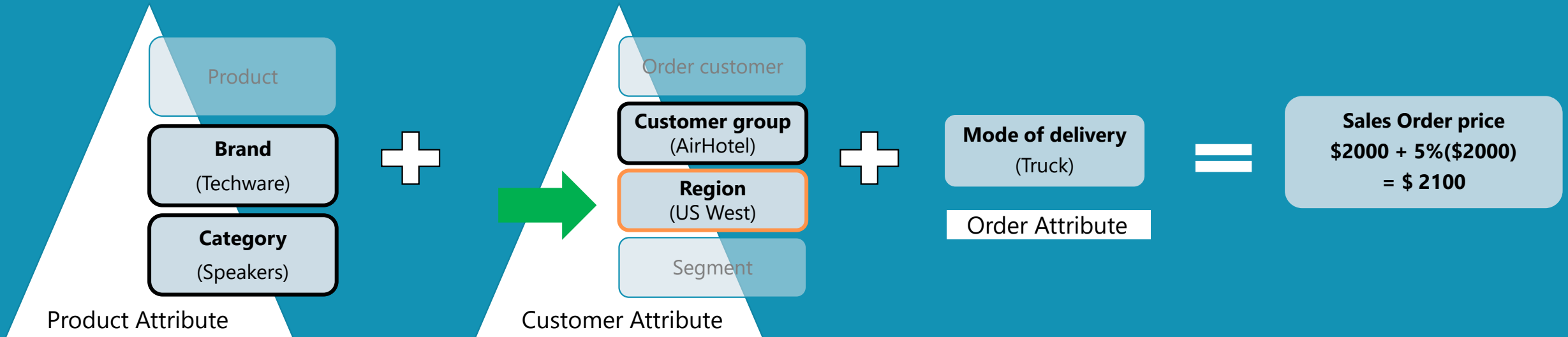
Margin component price adjustments

- An adjustment to the price
- Applied before discounts and charges
- A fixed amount or percentage
- Can be positive or negative
- Can be qty based
- Can compound with other margin components



Demo: Margin Price Adjustment

Debra Garcia(Sales Manager) wants the sales price of Speakers belonging to Techware brand to be priced at \$ 2000 for all Air Hotel customer group requiring delivery by truck. However, if the sale is made to all customers in the US West Coast region, an additional 5% margin adjustment needs to be applied to the sales price to account for additional cost.



In Dynamics 365 Pricing Management:

- Create a margin price adjustment of 5% for product attribute (Techware Brand & Speaker Category) + customer attribute (US west region)
- When a sales order is created and the attributes match the values in the trade agreement journal and the margin price adjustment, the sales price should be 2100\$

- Subaccounting
- Cost management
- Credit and collections
- Demo data
- Expense management
- Fixed assets
- Fleet management
- General ledger
- Human resources
- Inventory management
- Leave and absence
- Master planning
- Organization administration
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- Warehouse management

- Expand all Collapse ...
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 - Vendor price term agreements
 - Vendor list price
 - Base price versions
 - Trade agreement prices
 - Smart rounding
 - Trade agreement journal names
 - Posting
 - Pricing component posting
 - Discount claim posting
 - During-sales pricing
 - Sales trade agreement price
 - Trade agreement journals ★
 - Price adjustments
 - Margin component price adjustments
 - Discounts
 - Charges setup
 - Price simulator
 - Discount claims
 - Fund control
 - Inquiries and reports
 - Periodic tasks
 - Setup
 - Pricing management parameters
 - Price attribute groups
 - Price attribute groups ★
 - Customer price attribute groups
 - Product price attribute groups
 - Vendor list price groups
 - Price component codes
 - Price component codes ★
 - Price component code groups
 - Price component code setup ★
 - Price trees

Components

Publish status:

Disabled | Price attribute combination rank

PRICE COMPONENT CODE	PRICE ATTRIBUTE GROUP
Price component: <input type="text" value="Margin component"/>	Header price attribute group type: <input type="text" value="Group"/>
Price component code: <input type="text" value="Margin Price Adjustment"/>	Price attribute group: <input type="text" value="TT_CES Header Price Hierarchy"/>

Text for fiscal receipt:

Header price attribute detail:

VALIDATION PERIOD	Description	Start date	End date
Period number: <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

products

Combination rank	Site	Warehouse	Name	Unit	Allow unit conversion	Calculation type	Percentage	Amount
1001	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	Percentage	5.00	0.00

Discounts



Discounts

- A fixed amount or percentage off, or a specified unit price
- Applied after margin component price adjustments, and before charges
- Support for multiple discount types
- Concurrency control for multiple discounts



Discount types

Funds	Coupons	Simple discount	A discount applied to a product, where an amount or percentage is deducted from the price of the product	10% discount on all speakers \$25 discount on all Contoso brand speakers
		Mix and match discount	A discount applied based on specific combination of products (multiple sales lines).	Buy two boxes of tea and receive 50 percent off the price of a teacup
		Threshold discount	Applies a discount when the total for a transaction reaches one or more specified amounts – supports threshold tiers	10% discount on purchases over \$100 15% discount on purchases over \$200
		Quantity discount	A discount applied when two or more of the same item are purchased – supports quantity tiers	Minimum 5 items apply 5% discount Minimum 10 items apply 10% discount Minimum 11 items apply 15% discount
		Free item	Automatically adds one or more items to the sales order, at no cost to the customer	Spend over \$500 and get a free coffee mug

Discount concurrency mode

Discount concurrency control

- Determines how discounts are applied, when multiple discounts qualify
- Based on discount priority and combination
- Can be :
 - Exclusive
 - Best price
 - Compounded
 - Always apply
 - Price attribute combination rank



Demo : Simple Discounts

Kevin Cook (US Sales manager) wants to create special discounts for New Year period to increase sales on TV and soundbars. He decides to have 5% off for all TV, a special price \$1,299 for the Techware TV 55" QLED (T1000) and \$10 off on all soundbars.

Contoso Entertainment System USA

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Work items assigned to me
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Budget planning	Compensation management	Distributed order management	General journal processing	Outbound work planning	Purchase order confirmation	Store financials
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Catalog management	Customer invoicing	Financial analysis - all companies	Master planning	Product readiness for process manufacturing	Resource lifecycle management	Vendor invoice automation

Demo: Loyalty Programme Promotions

Contoso rewards loyal customers with its Loyalty Rewards Program, offering exclusive discounts on HD TV's.

Offer: Members receive *10% off*.

Karen Berg is a **Contoso Rewards Member**, which means she will receive *10% off* the TV, bringing the price down to *\$900*.

Price Group	Loyalty Attribute	Item Numbers (Product Attributes)	Original Price	Sales Price
FABPRC01	Loyalty program	T0011	\$1000	\$900

- Cost management
- Credit and collections
- Engineering change management
- Expense management
- Fixed assets
- General ledger
- Human resources
- Inventory management
- Landed cost
- Leave and absence
- Master planning
- Organization administration
- Payroll
- Pricing management**
- Procurement and sourcing
- Product information management
- Production control
- Project management and accounting
- Questionnaire
- Rebate management
- Retail and Commerce
- Sales and marketing
- Service management
- System administration
- Tax
- Time and attendance
- Transportation management
- Vendor collaboration
- Warehouse management

Filter

- ALLPRC00
All Channels
- FABPRC01**
Contoso Rewards Pricing
- ONLPRC01
Online Store Pricing
- STRPRC02
In-Store Pricing
- STUPRC01
Student Pricing & Discounts

Standard view

All price groups

Price group	Name	Rank
FABPRC01	Contoso Rewards Pricing	10

Conditions

Price attribute group

Loyalty

Name	Value
<input checked="" type="checkbox"/> Loyalty programs	Loyalty program

Enable multiple selections No

Trade agreement lines

Price adjustments

Discounts

ST100327 | Contoso Rewards Members Enjoy 10% ... | Simple discount

+ Add - Remove

Discount	Name	Discount type	Discount concurrency mode	Override priority	Pricing priority	Header price attribute group
<input type="checkbox"/> ST100327	Contoso Rewards Members Enjoy 10% off TV's	Simple discount	Exclusive		10	

Shipping discounts

Tender discounts

Other pricing management features

Discount budget control

Provides a means to control the total expenditure related to a discount

The first 1000 items sold get 20% off. The total discount amount in the fund is \$5000, once it is reached, the discount is no longer available.
10% off all speakers, up to a maximum discount amount of \$200

Price discount claim

Vendors/manufacturers can cover the costs of discounts/promotions to customers, allowing the distributor/retailer to claim back the expense

The distributor is offering 30% off select brand televisions, of which the vendor will fund 15% of that discount. The distributor claims back this amount based on sales.

Discount exclusion

Exclude discounts are often used in combination with include discounts, and allow you to specify which criteria shouldn't apply the discount

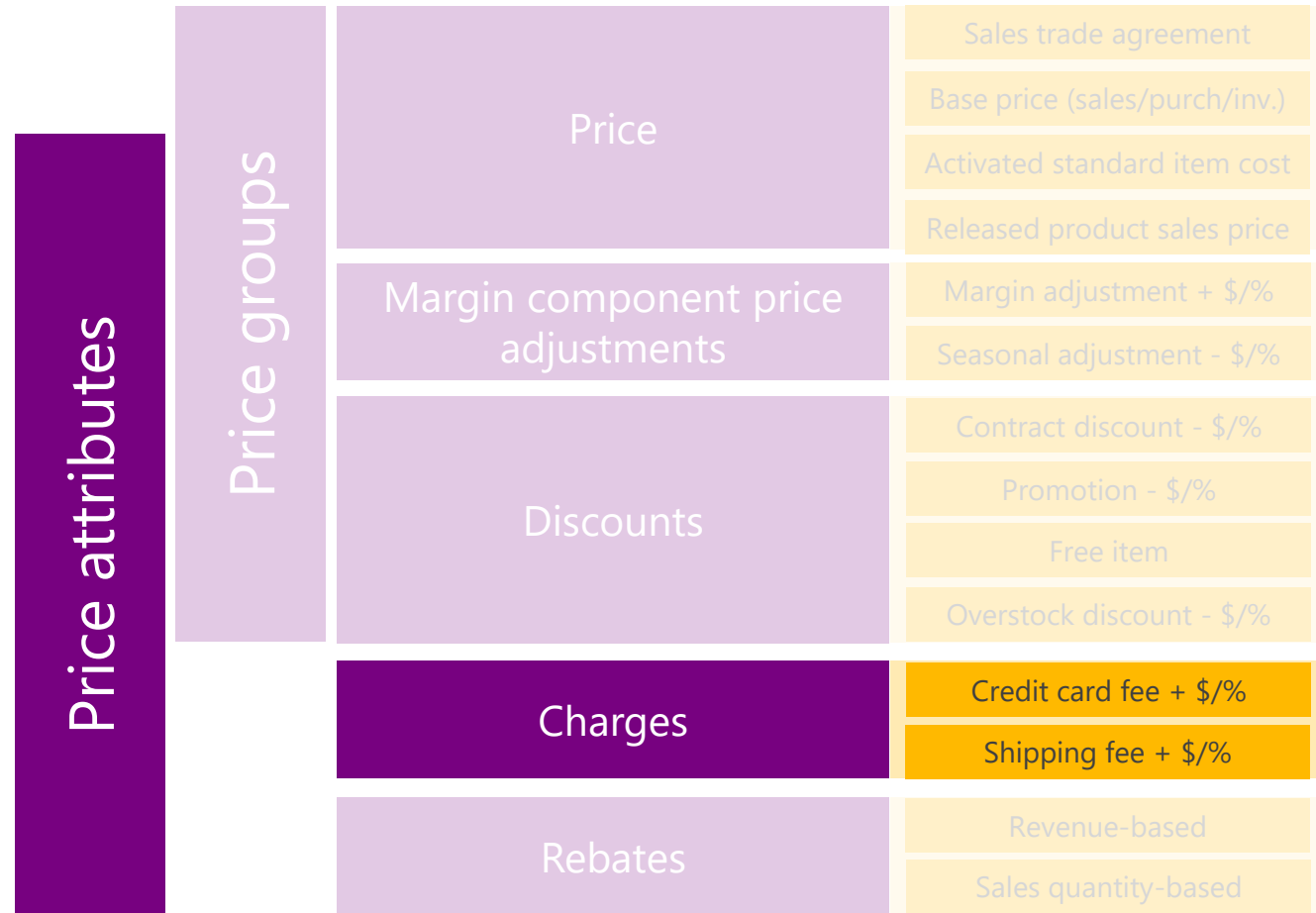
Apply discount to all customer groups except Retail customers

Charges

The image features a dark blue background. On the right side, there is a large, light blue circle. In the lower right quadrant, there is a white rounded rectangle. The word "Charges" is written in white, sans-serif font on the left side of the image.

Charges

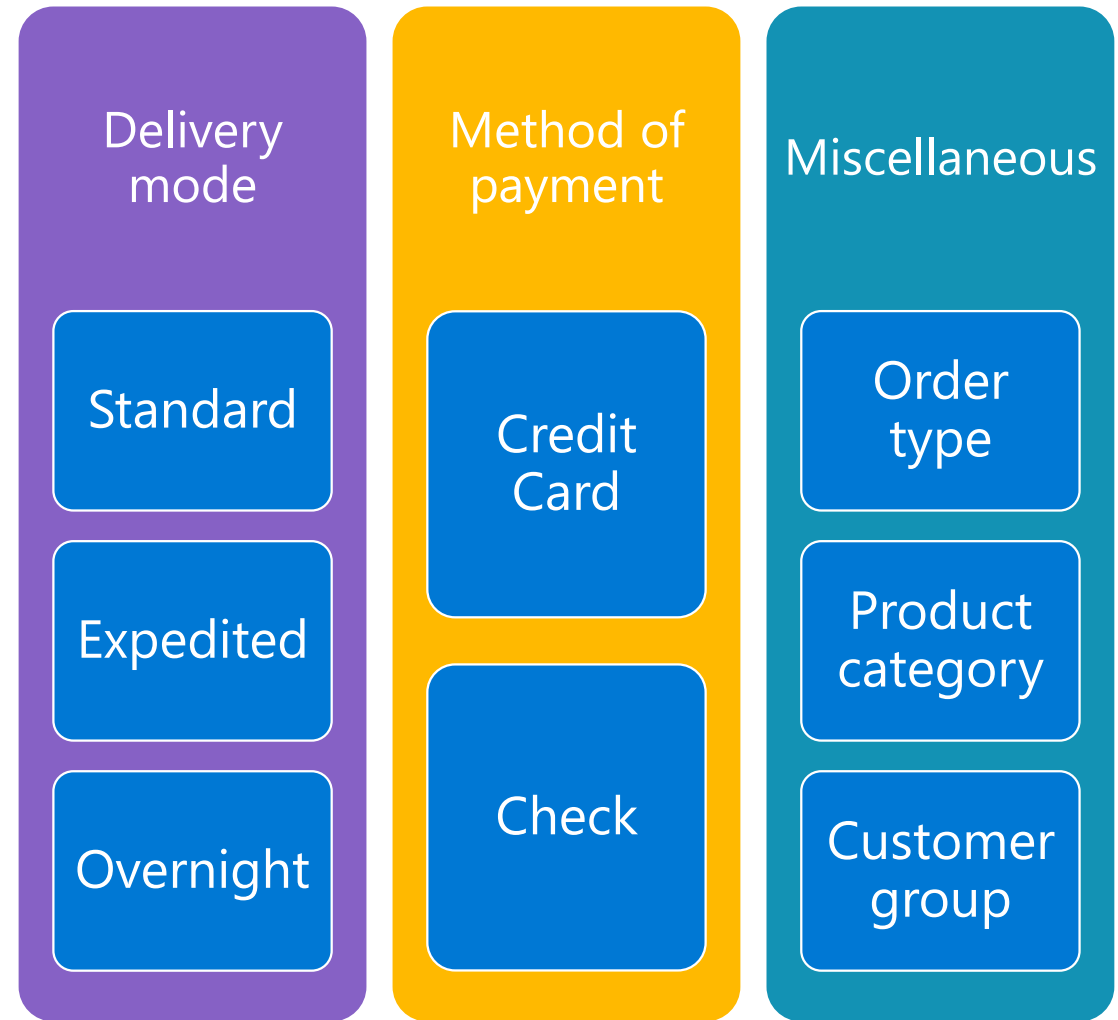
- New features included in pricing management:
 - Attribute-based
 - Date range controlled
 - Combination rank
- A fixed amount, percentage and unit-based (pcs.)
- Can be positive or negative
- Applied automatically (auto-charges), after discounts
- Applied based on sales order header or line
- Can be tiered, based on the order total



Charges attributes

Specific attributes are setup to support charges

- Delivery mode
- Method of payment
- Miscellaneous



Demo : Tiered header charge with attribute exclusion

To drive further enrolment in the Loyalty program, Contoso Entertainment system is offering Loyalty customers free shipping on all items.

Customer group	Shipping charge	Item brand
All	Order total amount <100 , 10\$ fee	All product hierarchy
Loyalty customer	Free	All product hierarchy



Contoso Entertainment System USA

Search people ...

< March 2023 >

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Work items assigned to me

- Cash advance request : Record returned
- Expense reports : Record returned
- Catalog : catalog approval
- Expense reports : Expense report approval
- Cash advance request : Cash advance request
- Approve travel requisition
- Catalog : catalog approval

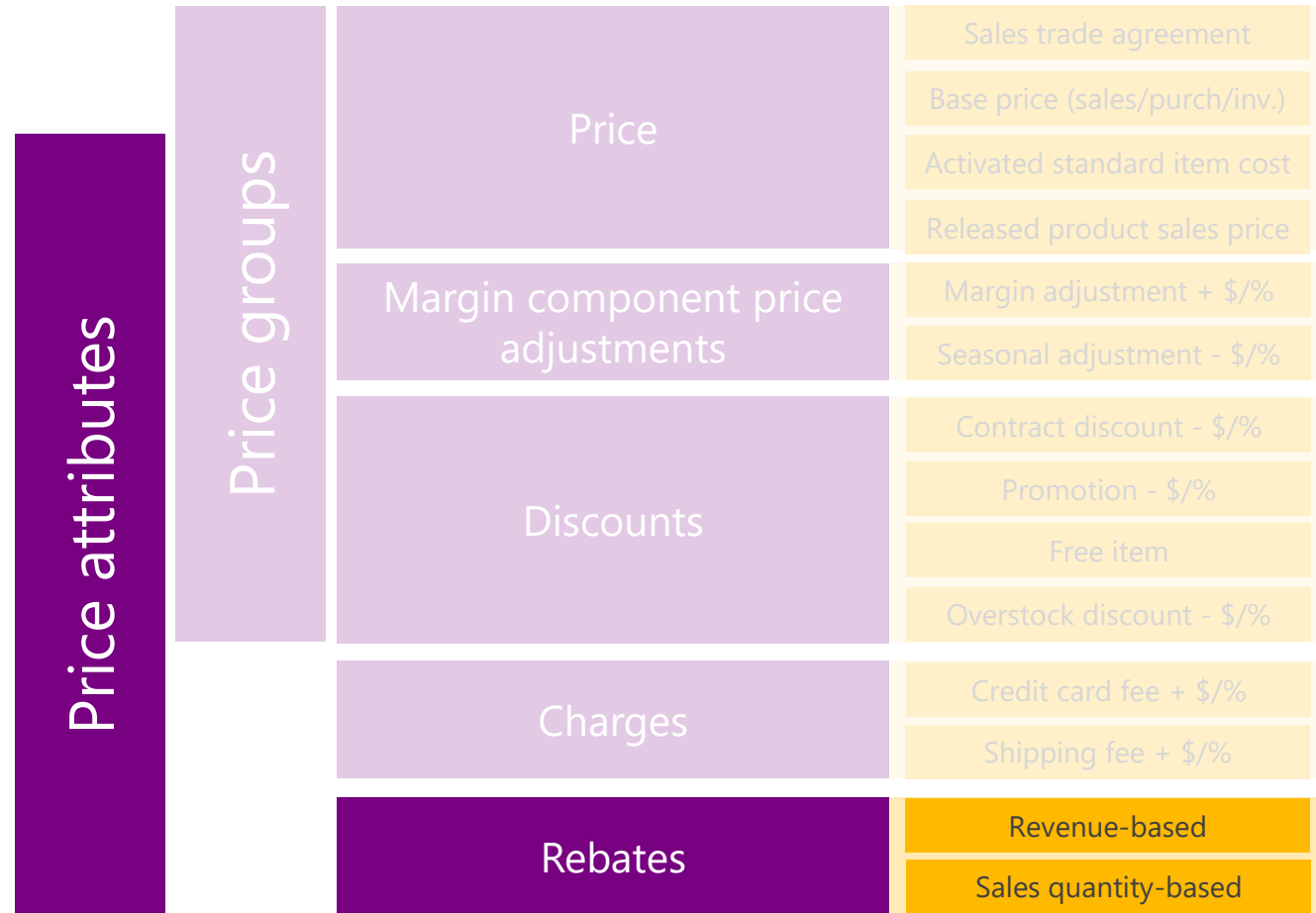
Bank management	Channel deployment	Data management	Financial period close	Optimization advisor	Production floor management	Sales return processing
Benefits	Channel merchandising configuration validator	Data validation checklist	Fixed asset management	Outbound work monitoring	Project management	Store financials
Budget planning	Compensation management	Distributed order management	General journal processing	Outbound work planning	Purchase order confirmation	Store management
Business document management	Cost accounting ledger administration	Electronic reporting	Invoicing	Payroll management	Purchase order preparation	System administration
Business processes for human resources	Cost administration	Employee development	Learning	People	Purchase order receipt and follow-up	Task management
Business processes for payroll	Cost analysis	Employee self service	Leave and absence	Personnel management	Recruitment management	Vendor bidding
Cash overview - all companies	Cost control	Expense management	Ledger budgets and forecasts	Pricing and discount management	Released product maintenance	Vendor information
Cash overview - current company	Customer credit and collections	Feature management	Maintenance request management	Product readiness for discrete manufacturing	Resource lifecycle management	Vendor invoice automation
Catalog management	Customer invoicing	Financial analysis - all companies	Master planning	Product readiness for process manufacturing	Retail and Commerce IT	Vendor invoice entry
Category and product management	Customer payments	Financial analysis - current company	My business processes	Product variant model definition	Sales order processing and inquiry	Vendor payments



Rebates

Rebates

- Price attribute-based **Customer rebate on sales**
- **Cross-company** rebates
- Calculation can be per invoice, period, customized period, agreement life-time
- Calculation based on Sales order, deliveries, paid invoice only
- Value(multi-currency)-based rebate, Quantity (UOM) -based rebate, Lumpsum rebate that can be amortized periodically
- Calculation method: Flat rate, Tiered, Incremental tiered, fixed amount and additional product (as a sales order)
- Settlement: Customer credit note, pay via account payable, generate fund as paid-out and partial payout.



Demo : Quantity-based customer rebates

Contoso Entertainment System has started selling to its hotel/accommodation customers, preassembled luxury entertainment system cabinetry. Many of these items on hand inventory is huge and produce greater costs for storage. Contoso is offering a new agreement to reduce the inventory to avoid more storage costs.

Deductions for specific customers buying some specific brand item in certain quantity with identified period. Each sales order total reaches to threshold quantity, customers will get deductions as credit note.

Customer group	Rebates	Item brand
AirHotel	10% deduction Qty <55 20% deduction Qty <100	Techware



Contoso Entertainment System USA

Search people ...

< **March 2023** >

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Work items assigned to me ^

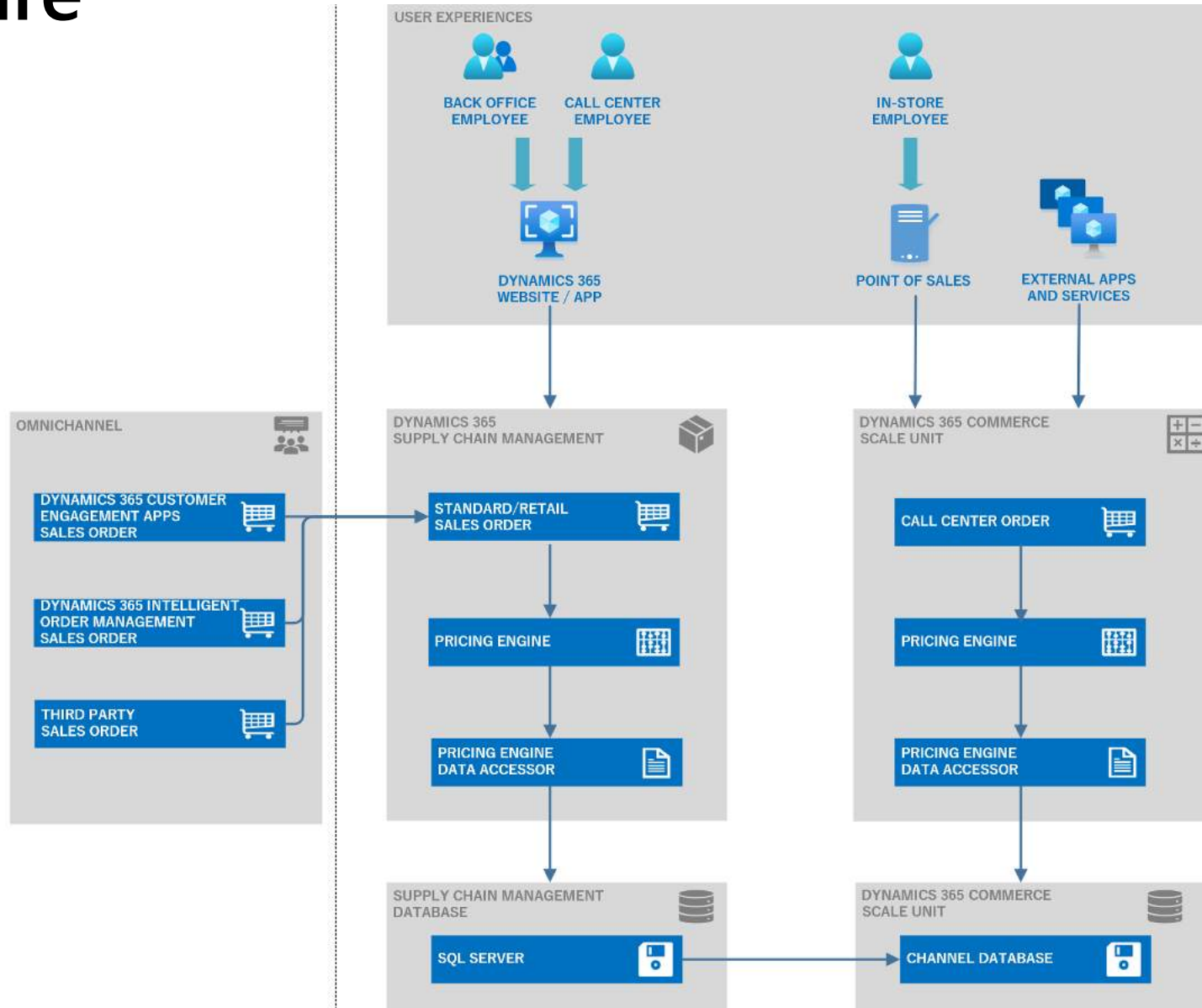
Work items will be displayed here after they are assigned to you.

Bank management	Cost analysis	Financial period close	Personnel management	Sales order processing and inquiry
Benefits	Cost control	Fixed asset management	Pricing and discount management	Sales return processing
Budget planning	Customer credit and collections	General journal processing	Product readiness for discrete manufacturing	Store financials
Business document management	Customer invoicing	Invoicing	Product readiness for process manufacturing	Store management
Business processes for human resources	Customer payments	Learning	Product variant model definition	System administration
Business processes for payroll	Data management	Leave and absence	Production floor management	Task management
Cash overview - all companies	Data validation checklist	Ledger budgets and forecasts	Project management	Vendor bidding

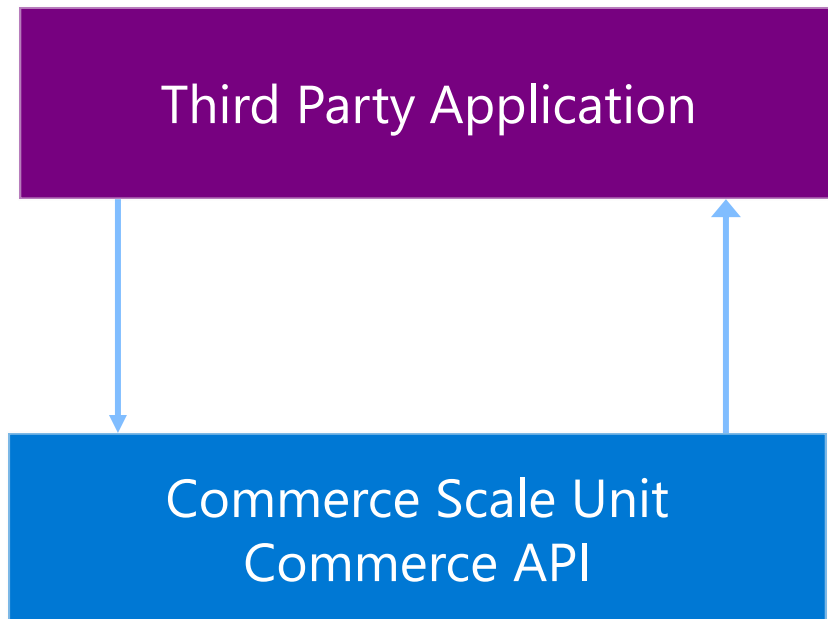
Architecture & API



Architecture



Integration pattern with 3rd party application



- Communication with 3rd party application through [Commerce Scale Unit - based pricing API](#)
- Common scenarios:
 - GetActivePrices
 - CalculateSalesDocument
 - GetAvailablePromotions
- How to:
 - [Consume Retail Server APIs in external applications](#)
 - [Commerce pricing APIs Examples](#)

Dos and Don'ts



Dos and Don'ts

- ✓ Plan your pricing and discounting strategy as early as possible and review it regularly to ensure that it aligns as your use of Dynamics 365 evolves.
- ✓ Use independent number sequences for each discount type.
- ✓ Test your discount configuration using the price simulator before you enable discounts.
- ✓ Conduct performance testing throughout the implementation and on a full set of migrated data before go-live.
- ✗ Avoid keeping invalid and expired discounts in the system.
- ✗ Always avoid or minimize overlapping discount lines.
- ✗ Don't create unnecessary high number of attributes

Roadmap

The image features a dark blue background. On the right side, there is a large, light blue circle. In the lower right quadrant, there is a white rounded rectangle. The word "Roadmap" is written in white, sans-serif font on the left side of the image.

Roadmap

2025 W1

General Availability

- GA

New features

- Enable sales order line attributes as price attributes

Copilot Innovation

- Pricing copilot- phase1

2025 W2+

Continuous convergence

- Unit price support
- Generic currency

• Enable catalogue as price attributes

- Subscription billing integration

Copilot Innovation

- Price copilot- phase 2

2026 W2 +

Continuous convergence

- Configurable B2B or B2C pricing behaviors

Pricing AI Insight

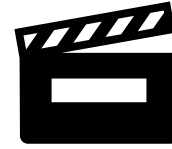
Pricing agents

Resources

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Additional Resources

- Yammer
 - [Dynamics 365 Unified Pricing Management](#)
 - [Migration from SCM to Unify](#)
- Learn
 - [Unified pricing management module overview \(preview\)](#)
- Ideas portal
 - [Ideas List](#)
- Dynamics 365 FastTrack Architecture Insights
 - [Dynamics 365 SCM Pricing Management](#)
- Blogs
 - [Introducing Unified Pricing Management: A Revolutionary Approach to Attribute-Based Pricing - Microsoft Dynamics 365 Blog](#)
 - [Manage attribute-based omnichannel sales pricing](#)



- [Unified Pricing Management Overview](#)
- [Price Attributes](#)
- [Base price determination](#)
- [Price Groups in Unified Pricing Managements](#)
- [Price structure overview](#)
- [Trade agreement](#)
- [Margin Component Price Adjustment](#)
- [Discounts – Discount](#)
- [Discounts - Mix and match discount](#)
- [Discounts - Quantity discount](#)
- [Discounts - Threshold discount](#)
- [Discounts - Free item](#)
- [Discount control](#)
- [Discounts – Coupon](#)
- [Price Component Code and Price Tree](#)
- [Charges](#)
- [Price component concurrency mode](#)
- [Rebate management](#)



QUESTIONS

Dankie Faleminderit **Shukran** Chnorakaloutioun Hvala Blagodaria
Děkuji **Tak** Dank u **Tānan** Kiitos **Merci** Danke Ευχαριστώ A dank
Mahalo הודות. **Dhanyavād** Köszönöm Takk **Terima kasih** **Grazie** Grazzi

Thank you!

감사합니다 Paldies Choukrane Aċiū Благодарам ありがとうございます
谢谢 Баярлалаа **Dziękuję** Obrigado Mulțumesc **Спасибо** Ngiyabonga
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