

The deal desk your CRM is missing

Pricing discipline, pipeline hygiene and customer-ready documents, inside the forms your team already uses

Dynamics 365 tells you what a deal is worth. It does not tell you whether the price is right, whether the deal has gone quiet, or what the customer will receive. DEX Pro Sales adds those three things as three code components and fifteen in-form panels, installed as one managed solution, working the same afternoon.

3 + 15

CODE COMPONENTS AND
IN-FORM PANELS

0

EXTERNAL SERVICES, KEYS OR
DATA LEAVING YOUR TENANT

23

LANGUAGES ON THE SIGNED
CUSTOMER REPORT

1

MANAGED SOLUTION, ONE
AFTERNOON TO INSTALL

WHAT IT DOES

Every line, **priced correctly.**

The opportunity product grid is where margin quietly leaks: a price typed from memory, a bundle quoted with a component missing, a discount nobody senior ever saw. DEX Pro Sales replaces that grid. Bundles expand into their components and rescale when the parent quantity changes. Quantity breaks apply from a price tier table your pricing team owns, not from a spreadsheet on somebody's desktop. Margin is calculated on every line against real standard cost and changes color as it falls. A discount past your threshold flags the deal and routes an approval to the owner's manager in Teams. One-time and recurring revenue are separated, with MRR and ARR totaled in the footer.

Nothing **goes quiet.**

Every pipeline carries deals that are technically open and dead. This finds them three ways. The pipeline board renders the whole pipeline as columns you drag, with a weighted forecast in the header and stale deals flagged. The health score rates each deal out of 100 across eight factors and names the gaps rather than just scoring them. And the stale alert learns each deal's own contact rhythm: a deal touched weekly for three months is late after ten days, not after a flat thirty. The seller logs the call, books the meeting or snoozes the deal without leaving the form, and a weekday digest emails each owner what has slipped.

The paperwork **the customer sees.**

Quote history shows what this customer has been quoted before, what closed, and the average discount it took to close it. The revision viewer puts two revisions of a quote side by side and marks what changed, matching lines by product rather than by row, so a reordered quote still compares correctly. Order fulfillment measures what has shipped line by line and writes the percentage back to the order. And the case resolution report produces a branded document carrying your logo, captures the customer's signature and your engineer's on screen, and files the signed copy against the case, in twenty-three languages.

And the platform underneath it.

A price tier table your pricing team owns. Fifty-three columns across ten tables, so scores and percentages land somewhere your views can filter on. Five business rules, a real-time workflow and three cloud flows covering risk alerts, discount approvals and the stale-deal digest. Nine views, a dashboard and two apps. All of it visible in the solution, all of it yours to adjust.

Where it shows up

- **Opportunity** - the product grid, a health score, next best action, the stale alert, competitor comparison and smart form utilities
- **Account** - an intelligence panel and a 360 view on a tab of its own
- **Lead** - live scoring, a tier and an inline duplicate warning
- **Quote** - the customer's quote history and a revision-by-revision comparison
- **Order** - fulfillment measured line by line and written back
- **Case** - the branded resolution report and its two signatures
- **User record** - a quota tracker with attainment, pace, gap and a team leaderboard
- **Dashboard** - the team pipeline view and a personal day planner
- **Any opportunity view** - the drag-and-drop pipeline board

Why buyers choose it

- **Nothing leaves your tenant.** No AI service, no API key, no vendor endpoint and no phone home. Every figure is computed in the browser from your own Dataverse, under the privileges of the person reading it. A security review takes an afternoon rather than a quarter.
- **Priced per organization.** Your read-only users, admin accounts and service accounts do not turn into an invoice. Declare a band, pay once a year, and grow inside it at no extra cost.
- **Documented like enterprise software.** Every formula, threshold, query and on-screen message is published in a 167-page user and administrator guide. When a number looks wrong, you look it up instead of raising a ticket.
- **Nothing is hardcoded.** Stages, thresholds, price tiers and the fields each panel reads are properties you set. It runs on your business process flow, not on a copy of somebody else's.
- **It behaves like the platform.** Every panel is a code component or a web resource inside the forms your team already uses. No second portal, nothing to synchronize, nothing new to log into.
- **One vendor, one contract.** The same functionality assembled from separate vendors means four products, four renewal dates and four support queues.

Straight about who builds it

DEX Pro Sales is built and supported by one engineer, and that shapes what you get. You deal with the person who wrote the code, so an answer is an answer rather than a ticket routed twice. What a larger vendor offers instead is continuity, and that is covered explicitly rather than glossed over: the documentation is complete enough to hand to any Dynamics partner, source code escrow is available on the larger bands, and implementation partners can be engaged to deploy and support the product where you would rather have a firm than a person.

At a glance

ITEM	DETAIL
Product	DEX Pro Sales Solution 5.2.0.0, managed, from Dynamic Experts Ltd.
Platform	Microsoft Dynamics 365 Sales on Dataverse
Contents	Three code components, fifteen in-form panels, one custom table, nine processes
Install	Import, bind four connections, set five variables, assign one security role
Prerequisites	Dynamics 365 Sales, a business process flow on Opportunity, a product catalog
External services	None. No account, key or subscription with any third party
Languages	The customer-facing case report ships in 23 languages
Licensing	Per organization, annual, banded by seat count. Non-production environments free
Evaluation	30 days in your own sandbox, full functionality, no card
Documentation	A 167-page user and administrator guide, shipped with the product

Put it in front of your own pipeline

Book a walkthrough in a working Dynamics 365 environment and we will run it against deals shaped like the ones your sellers carry.

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