



MICROSOFT DYNAMICS CRM

DESIGN WIN & SAMPLE MANAGEMENT



With MAX's Design Win & Samples Management Solution for Dynamics CRM, companies can more easily manage complex Design Win processes from the initial design collaboration to final product delivery.

By using this solution companies can support the design win lifecycle - from samples management to design registration and through to Design Win and Sales Forecasting. Design Win and Samples Management for Microsoft Dynamics CRM includes distributor and manufacturer rep portals that enable a seamless coordination between the production and distribution network. It also supports the ability to track and assign the right contract manufacturer (ODM) and end customer, often an OEM manufacturer. This solution is built upon the Microsoft Dynamics CRM platform and can be integrated into any ERP to seamlessly in pull pricing and push out orders from closed opportunities.

For more information, pricing or to request a demo, contact:

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Learn More
www.maxdynamics.eu

MAX's Design Win and Samples Management Solution for Microsoft Dynamics CRM, supports:

- Design registration process
- Project, program, sales opportunity, rebate and samples management
- Ship and debit contract management
- Design-in and Design-win workflows and business processes
- Complex pricing for RFQ's that may require volume based and time based pricing scenarios
- Commissions and commission splits tracking
- Both marketing and production part numbers
- Visibility of all products, sales opportunities and distributor and manufacturer relationships on a single screen
- Ability to evaluate multiple distributors and select them for contracts or projects
- Advanced analytic reports and dashboards for Design Win management, wins/ losses and post design win forecasting

With MAX's Design Win and Samples Management Solution for Microsoft Dynamics CRM manufacturers gain the insight and tools necessary to transform customer requirements into proven designs and winning proposals. Use this solution to:

- Streamline and automate business processes throughout the design win and design registration lifecycle
- Increase visibility across the Design Win process, from start to finish
- Improved project coordination between sales, outside contractors, engineering, distributors and product marketing
- Create a centralized document repository for spec sheets, design sheets and similar documentation
- Support tight integration with any ERP to pull in pricing or push out orders



Features and Screenshots from the Design Win and Sample Management Solution for Microsoft CRM

Dashboards provide a consolidated view of the various aspects of the Design Win process, eliminating the needs to frantically search for information around Design Registrations, Projects, Sample Requests, and other key industry data elements.

The screenshot shows the Microsoft Dynamics CRM interface for the Design Win dashboard. At the top, there are navigation tabs for 'Microsoft Dynamics CRM', 'WORKPLACE', and 'Dashboards'. Below this, there are utility buttons like 'SAVE AS', 'NEW', 'REFRESH ALL', 'ADVANCED FIND', and 'SEARCH'. The main content area is titled 'Design Win' and contains two primary tables:

- Active Design Registrations:** A table with columns for Registration Number, Customer, Distributor, Manufacturer/OEM, Quantity First Year, Date Submitted, and Status. It lists several entries, including those for General Electric, Medtronic, Samsung, and Dell Inc.
- Active Projects:** A table with columns for Name, Customer, and Creation Date. It lists projects such as 'Dell Illumina Project - 2014', 'Hitachi Data Systems', and 'Lunar Landing Gear'.

Below the tables are three charts:

- Dist vs OEM vs Rebate Amounts:** A bar chart comparing rebate amounts for various distributors and OEMs.
- Design Registrations by Distributor:** A pie chart showing the distribution of design registrations across different distributors.
- Sales Pipeline:** A funnel chart representing the sales pipeline, with a value of \$2,948,345.00.

Design Registration

The Design Registration form provides the ability to manage the design registration process, associated products & Distributor/OEM/ODM relationships. In addition, this form ties together the Design Registration with a related project and sales opportunity.

The screenshot shows the Microsoft Dynamics CRM form for a Design Registration. The breadcrumb trail indicates the path: 'Microsoft Dynamics CRM > HI TEK > Design Registrations > Medtronic - 4/2/2014'. The form title is 'DESIGN REGISTRATION : INFORMATION' and the main heading is 'Medtronic - 4/2/2014'. The form is divided into several sections:

- Registration Information:** Fields for Date Submitted (4/2/2014), Status (Approved), Status Reason (In Progress), Customer (Medtronic), and Quantity First Year (150,000).
- Project Information:** Fields for Project (Medtronic Project), Owner (Scott Mangelson), and Customer Contact (Steve Schmutz).
- Product Table:** A table listing products associated with the registration, including Resistor and HiRel.
- Relationships:** A section detailing the relationships between the Distributor (Arrow Electronics), Manufacturer/OEM (Medtronic), and ODM (Sanmina-SCL Corporation), along with their respective contacts.
- Opportunities:** A table showing sales opportunities, with one entry for 'Medtronic Semi Opp' with an estimated revenue of \$1,004,000.00.

Sample Request

The Design Win solution includes forms and processes to help streamline the sample request process, including automated approval routing and product management, and provides order fulfillment capabilities product setup when integrated with your back office ERP system.

Microsoft Dynamics CRM | HI TEK | Sample Requests | Medtronic: SR 1234

NEW DEACTIVATE DELETE ASSIGN SHARE

SAMPLE REQUEST : INFORMATION

Medtronic: SR 1234

General

Sample Request #	SR 1234	Distributor	Arrow Electronics
Customer	Medtronic	OEM	Medtronic
Opportunity	Medtronic Semi Opp	ODM	Sanmina-SCI Corporation
Sales Rep	Scott Mangelson		
Sales Manager	Anne Taylor	Status	Approved
		Date Approved	

Address

Ship To	--	City	Saint Helena
Attention	Steve Schmutz	State	CA
Line 1	1185 Starr Ave	Postal Code	94574
Line 2	--		

Requested Products

Status	Requested Item ↑	Product	Quantity Requeste...	Requested Ship Da...	Quantity Shipped	Shipped Date	Sales Manager...
Requested	Resistor	Resistor	50	7/17/2014			Dave Bellomy
Shipped	Resistor	HiRel	25	4/2/2014	25	4/1/2014	Scott Mange...

Design Opportunity Management

As part of the design registration process, design opportunities can manage the associated sales cycle, keeping track of revenues and contacts associated with it and of contract manufacturers who will ultimately build the OEM's product.

Microsoft Dynamics CRM | HI TEK | Opportunities | Medtronic Semi O...

NEW CLOSE AS WON CLOSE AS LOST RECALCULATE OPPORTU... ASSIGN

OPPORTUNITY

Medtronic Semi Opp

Sales Rep: [Scott Mangelson](#) | Est. Revenue: \$1,004,000.00 | Est. Close Date: 4/30/2014

GENERAL INTEREST | CUSTOMER QUOTE | SAMPLE REQUEST | Verbal (Active) | Close

Confirm Interest: Yes

Summary

Target Opportuni	Medtronic Semi Opp	Pipeline Phase	4-Verbal
Potential Custom	Medtronic	Design Stage	Sample Sent
Contact	Steve Schmutz	Probability (%)	40
Territory	Mid West	Commissions	
Description	This is an opportunity for some of our best products	Sales Rep 1	Scott Mangelson
Project	--	Commission %	7
		Sales Rep 2	Rob Harrison
		Commission %	4
Distributor	Arrow Electronics	Sales Rep 3	Anne Taylor
Distributor Contact	Rhett Thompson	Commission %	3
Manuf./OEM	Medtronic	Sample Requests	
Manufacturer Cont	Steve Schmutz		
ODM	Sanmina-SCI Corporation		
ODM Contact	Heidi Tucker		

ACTIVITIES NOTES

All | Add Phone Call | Add Task

- Proposal Follow-up
follow up on meeting to close agreements
Modified by [Scott Mangelson](#) 12/19/2014 10:34 AM
- Quote Proposal
Share quote resulting from Design Registration and Samples Requests - 18 mont...
Modified by [Scott Mangelson](#) 12/19/2014 10:30 AM
- Steve Schmutz
Follow up with Steve @ Medtronic
Completed by [Dave Bellomy](#) 12/19/2014 9:03 AM

Sample Request #	Customer ↑	Sales Rep
SR 1234	Medtronic	Scott Mangelson

Forecast Management

Provides the capability to incorporate forecasting specifically around design needs into the overall global manufacturing forecast of an organization.

Microsoft Dynamics CRM | HI TEK | Opportunities | Medtronic Semi O...

NEW | CLOSE AS WON | CLOSE AS LOST | RECALCULATE OPPORTU... | ASSIGN

OPPORTUNITY | Medtronic Semi Opp

Sales Rep: **Scott Mangels** | Est. Revenue: **\$1,004,000.0** | Est. Close Date: **4/30/2014**

GENERAL INTEREST | CUSTOMER QUOTE | SAMPLE REQUEST | Verbal (Active) | Close

Product Line Items

Quotes

Forecasts

Last Forecasted: **6/15/2014**

Period Date	Account End Customer	Product	SKU	Forecast Quantity	Forecast Price
4/2/2014	Medtronic	HiRel		2,500	\$7.00
5/2/2014	Medtronic	HiRel		1,300	\$5.00
6/2/2014	Medtronic	HiRel		10,000	\$5.00
7/2/2014	Medtronic	HiRel		12,000	\$4.75
8/2/2014	Medtronic	HiRel		8,000	\$4.25
9/2/2014	Medtronic	HiRel		10,000	\$5.00
10/2/2014	Medtronic	HiRel		10,000	\$5.00
11/2/2014	Medtronic	HiRel		12,000	\$5.25

1 - 8 of 13 | Page 1

Account Management

In addition to core account management capabilities, the Design Win solution provides added benefits to view manufacturing back office information around POS, POA & Booked, Billed & Backlog.

Microsoft Dynamics CRM | HI TEK | Accounts | Medtronic

NEW | DEACTIVATE | CONNECT | ADD TO MARKETING LIST | ASSIGN

ACCOUNT | Medtronic

Annual Revenue: **\$16,900,000.00** | No. of Employees: **46,000** | Owner: **Scott Mangels**

Revenue

Indirect

POS by Month

POA by Month

Booked, Billed, Backlog

Summary

ACCOUNT INFORMATION

Account Name: **Medtronic**
 Phone: **1 763 514 4000**
 Fax: **1-763 855 4566**
 Website: **http://www.medtronic.com**
 Parent Account: **--**
 Ticker Symbol: **MDT**

ADDRESS

710 Medtronic Parkway
 Minneapolis, MN 55432
 USA

ACTIVITIES | NOTES

All | Add Phone Call | Add Task

Proposal Follow-up
 follow up on meeting to close agreements
 Modified by **Scott Mangelson** 12/19/2014 10:34 AM

Quote Proposal
 Share quote resulting from Design Registration and Samples Requests - 18 month plan
 Modified by **Scott Mangelson** 12/19/2014 10:30 AM

Steve Schmutz
 Follow up with Steve @ Medtronic

Primary Contact
Steve Schmutz
 E-mail: **sshchmutz@mdt.com**
 Business: **801-965-5584**

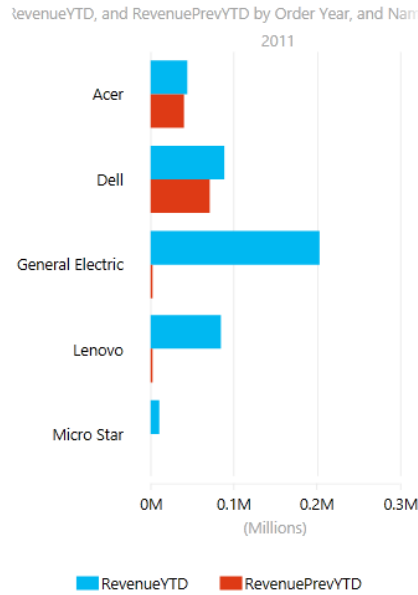
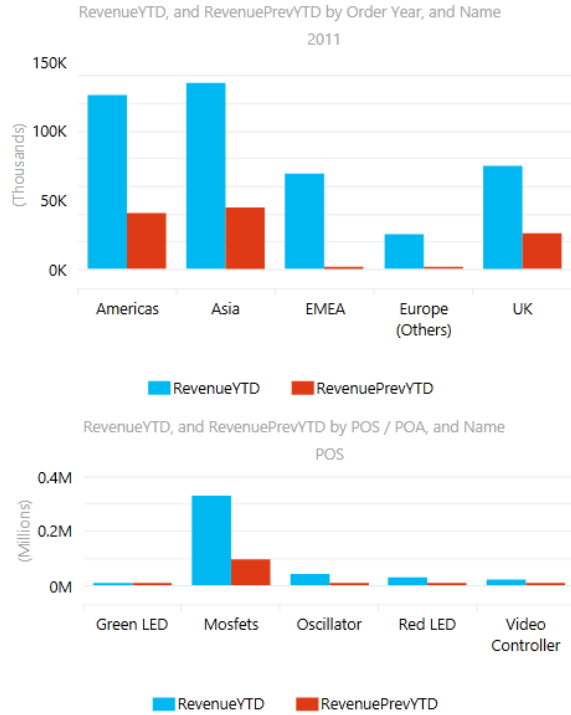
CONTACTS

Full Name	E-mail
<input type="checkbox"/> Fred Silva	FSilva@mdt.com
<input type="checkbox"/> Sandra Smith	ssmith@mdt.com
<input type="checkbox"/> Steve Schmutz	sshchmutz@mdt.com

Analytics

Enhanced analytic capabilities allow organizations to view complex year over year trends, forecasting pivots, territory analysis, forecast vs actuals, and other critical Design Win metrics.

Top Customer Year over Year Performance Analysis



Filters

VIEW

- > Distributor
is Arrow, Avnet or Digikey
- > Name
is Acer, Dell, Micro Star, Lenovo or General Electric
- > Name
is not SUV
- > Order Year
is not (Blank), 2010, 2013 or 2012

About MAX

MAX is the result of the Trans-Atlantic partnership between Swiss based DotWood CRM and United-States (California) based Armanino: Microsoft Dynamics CRM Partners with deep manufacturing process knowledge and innovative, cutting-edge solutions built directly into Dynamics CRM.

- International & Multilingual Microsoft Dynamics CRM Partners
- MAX Solutions are adapted to your Industry and the way you do business
- Wealth of experience and insights across a broad range of industries and services
- Working with a Gold Certified Microsoft Dynamics CRM Partner, Customer Excellence Award Winner and Microsoft Inner Circle Partner