

Dynamics 365 - Frequently asked questions

Last Modified on 21/11/2024 2:31 pm GMT

Frequently Asked Questions

How many products can I add to an opportunity?

You are able to add multiple products to an opportunity, but you they will need to be similar. For example, one software product may have several different modules. These can all be added to the same opportunity. If you have product types that are very different, create a new opportunity.

Also, if there is a chance the client is not going to go ahead with one element, it's best to create a separate opportunity. When an opp is Closed as Won, all products will be taken over and it's easier to close a separate opp if it doesn't go ahead.

Can I have multiple products on an opportunity with different terms?

It's best to add any products with any distinct differences to separate opportunities. This includes term.

Can I view all opportunities for an account?

Yes, navigate to the account. Click into the Related tab> Select Opportunities. This will open to show the Opportunity Associated View, which includes open and closed opportunities. To change the view, click into the arrow to the right of Opportunity Associated View and another view.

What if a product is not on a Price List?

You can deselect the Select Product field in the Quick Create: Opportunity Product screen. This will be a Write-In, one time use product, that will not be added to your price list. It is very important to use your companies prefix at the start of the write-in product. This will ensure your products are included in any MI reporting.

Important Notes

Can a product not on the Price List be added to an opportunity?

Yes, when clicking 'Add Product' in the Product tab of an opportunity, you can deselect the Existing field and add a Write-In product. Please note - Use your Prefix before the product. This is important for any MI and being able to filter your product lines.

Do Price Lists have standard charging?

Yes, most products on the price lists have standard charging structures that were set when we received the price lists. When selecting a product, the default charge for that product will appear. If you are offering a discount, override the price by typing in the per unit cost. This field is manual, and any discount will need to be calculated before entering the value. In the future we hope to be able to pull through the default charge and calculate the discount on the system.

