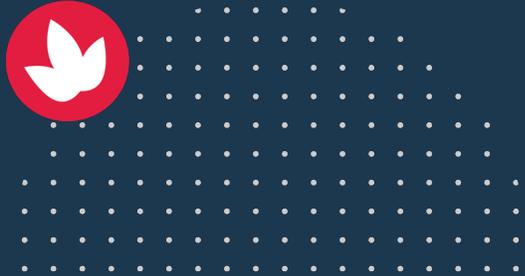Red Maple®

ADVANCED TRADE AND PRICING

2022 | Pitch Deck

STRENGTHEN CUSTOMER RELATIONSHIPS AND BOOST REVENUE

The Advanced Trade and Pricing extension from Red Maple enables companies to manage complex trade and billing relationships. It integrates seamlessly with Microsoft Dynamics 365 for Finance & Operations and AX2012.

It empowers you to track customers, from orders to service contracts to warranties; handle advanced and flexible pricing through the entire application, meet advanced billing needs, set up billing schedules, complex revenue recognition, manage warranties and more.

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Dynamics 365

WATCH VIDEO

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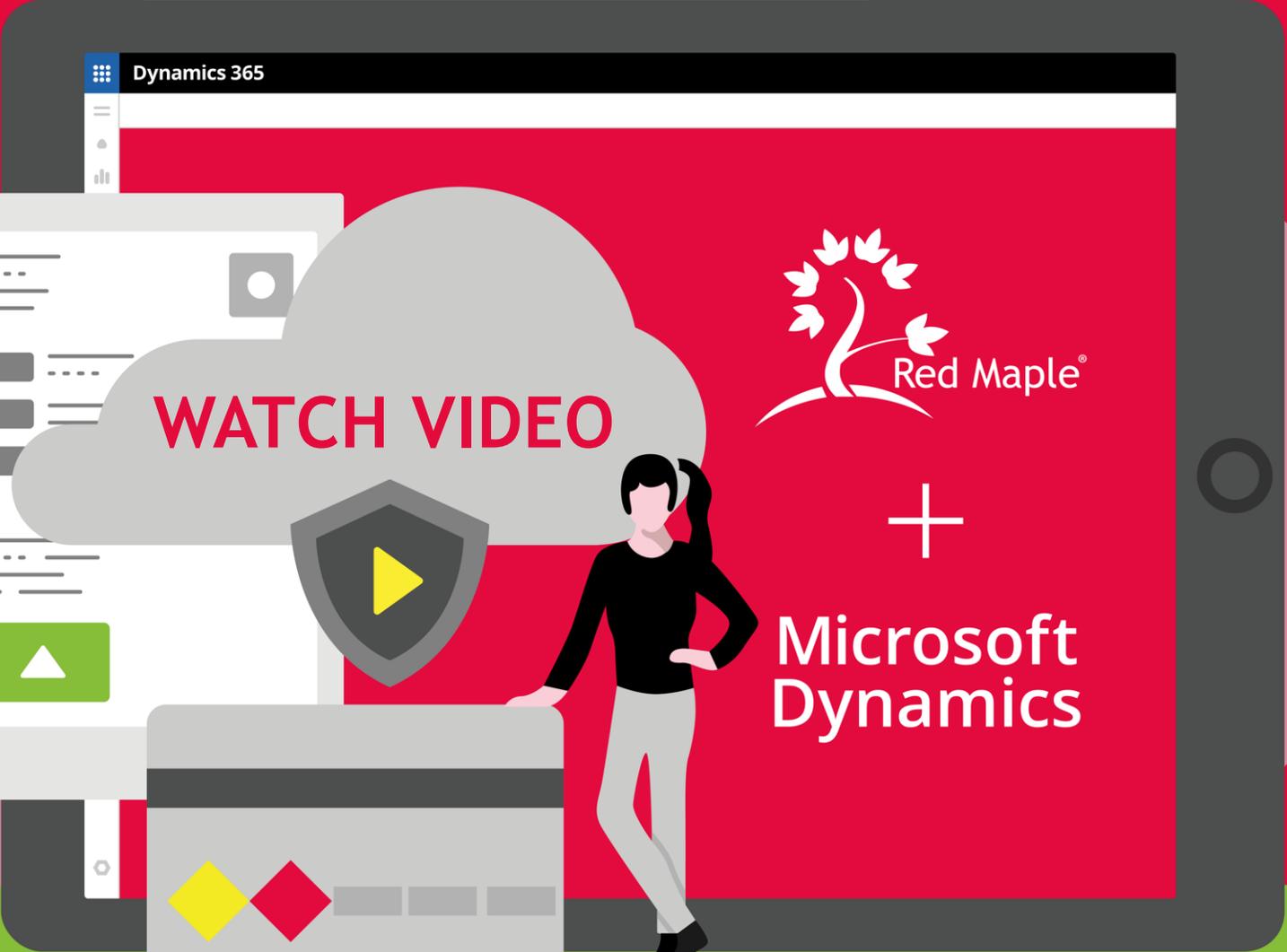
Microsoft Dynamics

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WHO NEEDS IT

Distributors

Software Manufacturers

Finance Companies

Global Companies

Advanced Trade and Pricing helps you simplify, enhance and expand your trade and billing functionality.

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WHY YOU NEED IT

Businesses need this software to help simplify all of their complex billing and expand their trade with ease.

A company can manage customer performance whether they order once or regularly.

Most importantly, it allows businesses to
track and manage all of their services contracts and warranties.

Companies need this powerful software for advanced pricing, to manage contracts and recognize revenue.

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HOW IT WORKS

Red Maple's Advanced Trade extension enables companies to manage complex trade and billing relationships by expanding and improving the existing functionality within Microsoft Dynamics. It works hard so you can accomplish more, exceed expectations and increase revenue.

Advanced Pricing

Advanced Pricing introduces enhanced D365 | AX 2012 features and capabilities necessary to handle complex computations and adjustments.

It includes the flexibility to calculate pricing based on a range of range of methods:

- List price
- Cost plus
- Buy One Get One (BOGOs)
- Special Pricing Incentive Fund (SPIFs)
- MAP
- Global Software Application (GSA) and contexts.

Recurring Billing

For companies with more complex billing requirements, our Microsoft Dynamics 365 | AX trade management and billing extension goes beyond basic sales orders and projects to encompass subscription services.

This advanced functionality includes the ability to create contracts and provide individual pricing, and to mix and match delivery methods.

Advanced Trade can also provide volume billing based on schedules and/or usage-based agreements or on established contract pricing.

Revenue Recognition

Accrue and amortize revenue or expenses based on the sale or purchase of goods.

For items that require revenue recognition after the sale, our Dynamics 365 trade management solution tracks and provides amortization journals to speed up the process.

Likewise, FASB ASC 606 standards are covered out of the box.

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THE BENEFITS

MANAGE

With this Microsoft Dynamics Trade Management software extension, companies can administer trade agreements through contracts. Trade administrators can manage individual accounts quickly and easily through a robust contract management interface, create contracts for a one-time sale or long-term sales agreements.

Within the contracts, companies can outline agreements that specify the products, prices, volume discounts, commitments and other terms and conditions that govern future orders.

Orders placed against the pricing contract are automatically governed by the negotiated terms and do not require any manual lookup or processing, thus reducing overall administrative costs.

IDENTIFY

With Red Maple's Dynamics 365 trade management software solution, companies can negotiate customer purchase commitments for either the entire contract or for specific items in the contract.

You can also track accumulated order totals and compare them quickly and easily against contractual commitments.

This added functionality enables sales teams and trade managers to proactively negotiate better deals based on customer buying patterns and notify customers of outstanding commitments well in advance.

ENHANCE

These added features enable merchants to automatically fulfill sales orders to ensure goods are delivered on time, and allow customers to place orders for goods filled regularly over time.

Likewise, you can also generate orders based on a billing schedule, charging the customer a regular amount over time, or based on usage of goods.

FOCUS ON THE CUSTOMER

Red Maple's Advanced Trade enables sales teams to focus more on customers and not pricing by providing pricing controls over the lifetime of an agreement.

When a customer places an order for goods, Advanced Trade governs the pricing of the order based on past purchases.

If the quantity of the order surpasses a contractual price break, the extension automatically modifies it to honor the pricing set within the trade agreement.

RECOGNITION

For trade agreements to be effective, they must enable revenue recognition at appropriate times. With Advanced Trade, revenue accruals are generated directly from trade agreements to ensure revenue recognition occurs when you want it.

Companies can create amortization schedules and assign them to an individual trade agreement, creating a flexible financial schedule, or on a customer-by-customer basis.

Businesses can also record revenues using the milestone or deliverables methods. This added flexibility assists with GAAP and Sarbanes-Oxley compliance no matter if you are recognizing revenue on an accrued or a deferred basis.

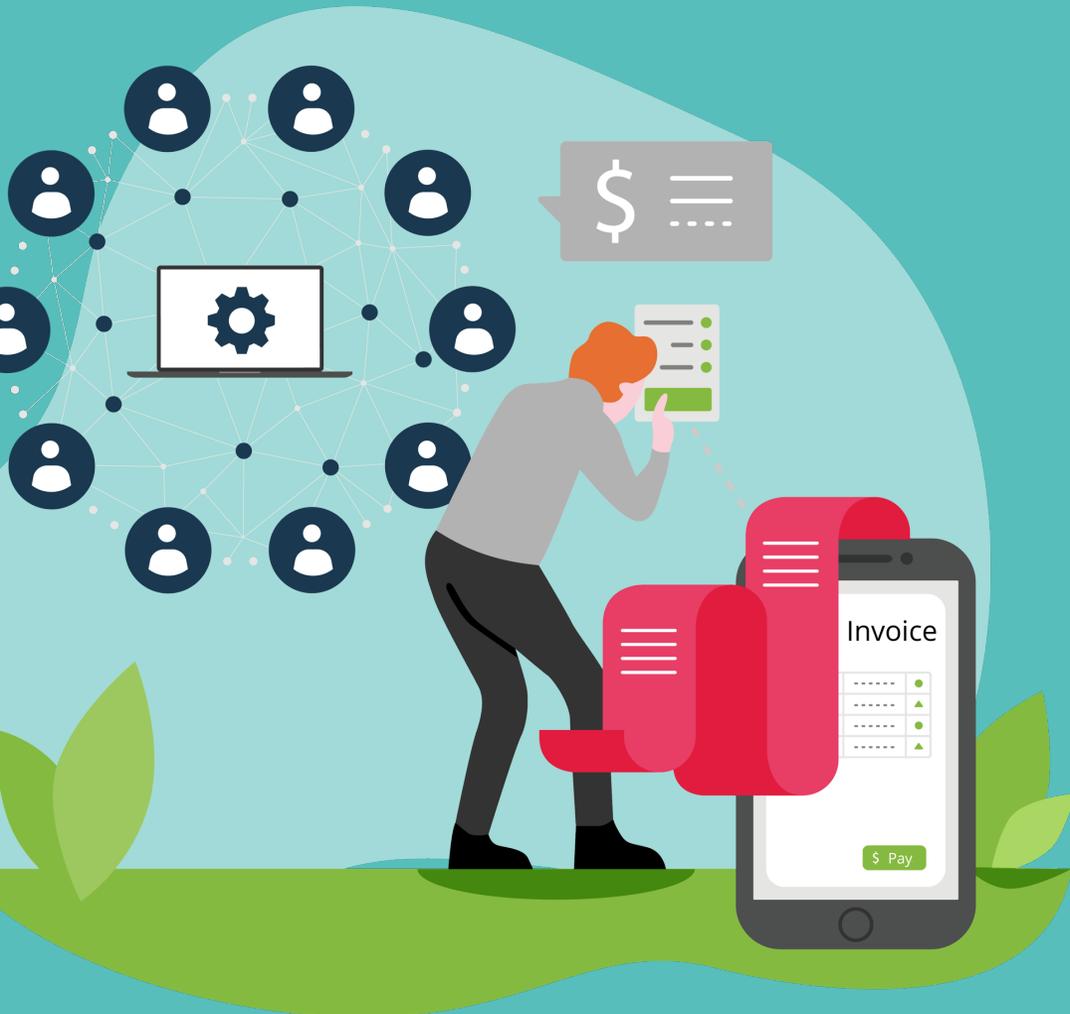Red Maple®

DIFFERENTIATORS

Advanced Trade allows businesses using Dynamics 365 and AX to manage complex trade and billing relationships.

Advanced Trade enables you to track contracts with all customers, from orders to service contracts to warranties, handle advanced and flexible pricing throughout the entire application, meet advanced billing needs, set up billing schedules and complex revenue recognition and more.

With our software, revenue accruals are generated directly from trade agreements to ensure revenue recognition occurs when you want it.

Companies can create amortization schedules and assign them to an individual trade agreement, creating a flexible financial schedule, or on a customer-by-customer basis. Businesses can also record revenues using the milestone or deliverables methods. This added flexibility assists with GAAP and Sarbanes-Oxley compliance no matter if you are recognizing revenue on an accrued or a deferred basis.

You can also create amortization journals at regular intervals in order to recognize revenue that's already arrived. It attaches each entry to a trade agreement so that both the financial and sales teams can accurately track the results of each order over the life of the contract.

Invoice

$ Pay

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FREQUENTLY ASKED QUESTIONS

Can we use Advanced Trade and Pricing for subscription billing with our current credit card processor?

Yes. You can use Advanced Trade and Pricing for subscription billing. If you have Red Maple's Advanced Credit Cards you can also run credit cards to pay for subscription invoices. We know changing a financial relationship is hard and time consuming. That's why we **fully integrate with 15+ major credit card processors.** Simple, easy, secure.

Do I have to host anything?

No, it is all hosted in Microsoft Azure.

What are the product requirements?

You need Microsoft Dynamics 365 for Finance and Operations or Microsoft Dynamics AX 2012 (R2 and R3).

Optional modules include Red Maple's Chargeback Claims Management, Red Maple Advanced Credit Cards, Red Maple Advanced Commissions, and Red Maple Clever Division (U.S. Patent No. 10,853,818).

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