

Prospect Questions - Microsoft Dynamics 365

- **Is B2B (Business to Business) and B2C (Business to Consumer) required?**
- **Do you need to provide customer access for account info., entering requests for quotes, or other collaboration?**
 - If B2B, are there any major ERP modifications to your Order Entry process?
 - If B2C, are there any significant modifications to the Customer Entry process ?
- **Do you have customers calling your internal customer service team asking for information such as items, availability, pricing, shipping lead times, invoices, accounts receivable balances/aging, etc.?**
- **Do you have a web presence now?**
 - If so, by who?
 - Is your current site integrated with MD365?
 - If so, is the integration managed by your eCommerce provider or another vendor?
- **How many item #s/SKUs do you sell and will they be listed on a possible site?**
- **How many orders do you process (or expect to process) per month?**
- **How long does it take to enter and fulfill an order on average?**
- **Are their special pricing rules in effect?**
 - Consistent across all customers?
 - Any special pricing for specific customers?
 - Are all pricing scenarios in MD365?
- **Do you require pricing to be exposed only when logged into your site?**
- **Is online credit card authorization a requirement on your eCommerce site? If so - which Payment Gateway do you currently utilize?**
- **Is integrated shipping/rate quoting a requirement? What do you use to quote shipping rates?**
- **Do you currently or need to integrate with a Sales Tax Service? If so, which one?**
- **Do you require inventory availability information on your eCommerce site?**
- **Do you have any special requirements, such as upsell/cross-sell, store locators, coupon codes, automatic reorder, etc.?**

