

Experlogix CPQ & Document Automation for Utilities

*Simplify complexity. Accelerate service delivery.
Improve customer experience.*

For electric, gas, water, renewable, and district energy providers, quoting requires navigating service territories, regulatory rules, technical requirements, and dynamic pricing.

Experlogix CPQ and Document Automation for **Microsoft Dynamics 365** helps utilities configure accurately, price confidently, and serve customers faster.

1. Configure Complex Service Packages

- Guided configuration of meters, transformers, EV chargers, solar options, service tiers, and installation packages
- Built-in compatibility rules for residential vs. commercial customers
- Auto-recommended add-ons (protection plans, maintenance, monitoring)

Result: Reps can confidently build valid, complete configurations without engineering intervention.



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2. Enforce Location, Regulatory & Capacity Rules

- Service-area and ZIP-code availability logic
- Automatic application of commercial/residential equipment rules
- Eligibility checks for incentives, permits, grid capacity, or compliance
- Prevention of configurations that exceed load or violate regulations

Result: Quotes are accurate, compliant, and install-ready before handoff to operations.

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3. Automate Usage-Based & Multi-Component Pricing

- Pricing based on customer class, region, time-of-use, or seasonal rates
- Automatic application of environmental fees, surcharges, and pass-through costs
- Unified pricing of equipment, installation, and services in one quote
- All logic centralized inside **Dynamics 365**

Result: Quotes are consistent, accurate, and audit-proof—no spreadsheets required.

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4. Generate Complete Proposals & Contract Packages

- Auto-generated service agreements, disclosures, and contract bundles
- Equipment specs, installation requirements, and project timelines
- Standardized templates powered by Experlogix Document Automation
- Live data pulled from **Dynamics 365**

Result: Customers receive polished, compliant documents instantly.

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5. Streamline Approvals Across Teams

- Automated routing to engineering, legal, finance, or operations
- Threshold-based approvals for workload, discounts, or special equipment
- SLA timers, tracking, and full audit trails
- Visible and manageable inside Dynamics 365

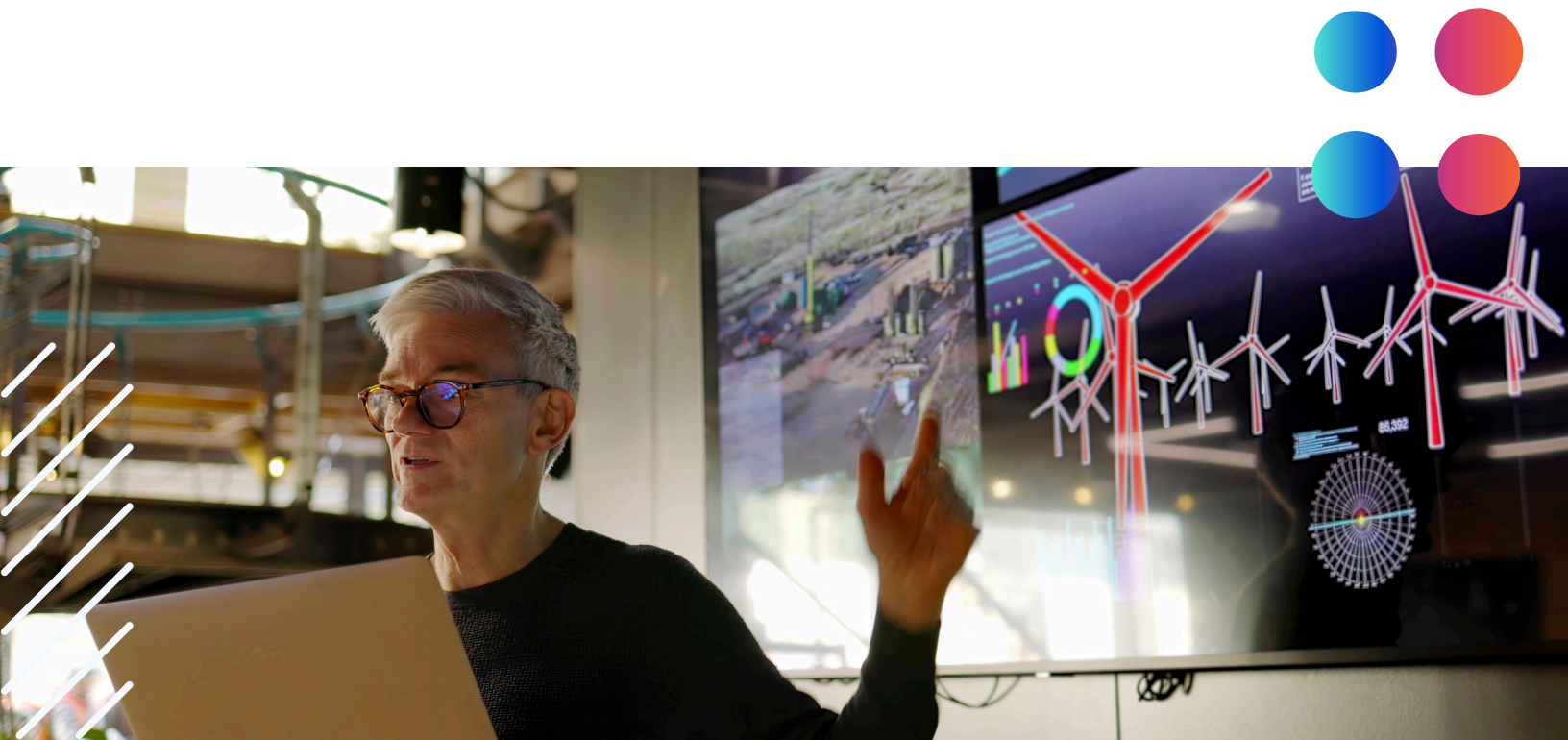
Result: Faster, more controlled approvals—even for large commercial projects.

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6. Improve Quote-to-Install Alignment

- Accurate transfer of equipment specs, installation steps, materials lists
- Automatic generation of downstream work orders and service tasks
- Smooth integration with Dynamics 365 Field Service and project workflows
- Fewer manual adjustments in the field

Result: What's quoted is exactly what gets installed—reducing delays and rework.



Our Utilities Customers

Trusted by leading utility providers modernizing their quoting, pricing, and service delivery with Dynamics 365.



Why Experlogix for Dynamics 365



Faster quote cycle



Accurate, compliant pricing



Stronger regulatory governance



Reduced field corrections



Better customer experience



Support for emerging services (solar, EV charging, distributed energy)

Why Experlogix for Dynamics 365

With 20+ years helping organizations navigate configuration complexity, Experlogix delivers one of the most advanced CPQ solutions for Dynamics 365 Sales, Customer Service, and Finance & Supply Chain. Utilities choose Experlogix to modernize revenue operations and streamline the entire quote-to-install process.

