COMMERCE CODE

TPM CODE · TRADE PROMOTION MANAGEMENT FOR DYNAMICS 365

Turning trade spend into profitable growth

Plan, simulate, govern and settle trade promotions inside Microsoft Dynamics 365, with an AI layer in Microsoft 365 Copilot.

9
capability pillars

20+
built-in KPIs

1
data model with your ERP

Product overview · Version 1.0 · October 2026

www.commerce-code.com · info@commerce-code.com · www.tpmcode.com

AT A GLANCE

Trade promotions, governed where orders are priced

Four things make TPM Code different from a standalone TPM tool.

Native, not bolted-on

Runs inside Dynamics 365. One data model and one security model, ready for Power BI, Fabric and Copilot.

Approval is enforced

If a promotion is not approved in TPM Code, the Commerce pricing engine cannot execute it.

Decide before you spend

Baseline, uplift and the full customer P&L simulated per deal, sales plan and live plan.

AI on top of control

TPM Code IQ brings 17 trade-promotion skills into Microsoft 365 Copilot, under the same approvals.

Available on Microsoft Marketplace · Built on Dynamics 365 Commerce & Supply Chain · TPM Code IQ for Microsoft 365 Copilot

THE CHALLENGE

The biggest commercial investment is the hardest to steer

Independent research on trade spend and promotion effectiveness.

20%

of revenue: what a food and beverage company can spend on retail trade promotions

McKinsey, 2024

80%

of promotional investment fails to contribute to category growth

Bain & Company

~50%

of promotional sales cannibalise non-promotional sales

Bain & Company

5-15 pp

EBITDA margin uplift available to CPGs from digital and AI transformation

McKinsey, 2024

Sources: McKinsey, 'Fortune or fiction? The real value of a digital and AI transformation in CPG', Oct 2024. Bain & Company, 'Why consumer product companies need to solve revenue growth management'.

THE ROOT CAUSE

Why TPM programmes disappoint

The tool plans the deal; a different system prices, invoices and settles it.

80%+ of consumer products CEOs are dissatisfied with their RGM results

50% of RGM programme functionality goes unused; up to 70% is deployed in only one market

5% of CPGs are getting RGM right

WHAT WE SEE IN THE FIELD

- Deals are planned in a TPM tool but priced by the ERP, so field execution drifts from the approved plan
- Actuals arrive by batch interface, so the P&L is always behind real life
- Accruals, claims and settlement sit with finance in another system
- Sales, trade marketing and finance keep separate versions of the truth

Source: Bain & Company, 'Why consumer product companies need to solve revenue growth management' and 'RGM Reset: Capabilities for a Competitive Edge'.

Most TPM solutions plan outside the system that prices the order

How the alternatives are built, and what that means for execution.

Standalone TPM / RGM SaaS

Visualfabriq · UpClear · Exceedra · TELUS

Strong analytics and optimisation; actuals, accruals and settlement come in through ERP integration.

CRM-embedded TPM

Salesforce CG Cloud · Aforza · CPGvision

Strong account and field workflows; adds a CRM platform while pricing and settlement stay in the ERP.

Planning platforms

Anaplan · o9 Solutions

Powerful planning layer; execution, claims and the general ledger stay in the ERP.

SAP ecosystem

SAP CRM TPM / Customer Business Planning · Vistex

Deep in SAP; SAP Business Suite 7, which includes CRM, leaves mainstream maintenance at the end of 2027.

Dynamics 365-native: TPM Code Planning, pricing, execution, accruals and settlement on one data model.

Groupings based on public vendor information, October 2026; capabilities vary by vendor and implementation. SAP maintenance dates: SAP News, Feb 2020 and Oct 2026.

Where TPM Code differs

The difference is architecture: control at the point of pricing, not after it.

	TPM Code	Standalone TPM SaaS	CRM-embedded TPM	D365 standard trade allowances
Promotion P&L before commit	Deal, sales plan and live plan	Yes	Yes	Basic profitability view
Baseline & uplift forecast	Price, display, distribution, ATL/BTL	Yes, often ML-led	Varies by vendor	Not included
Approval enforced at order pricing	By the Commerce pricing engine	Via ERP interface	Via ERP interface	Manual set-up
Actuals into the P&L	As transactions commit	Batch interface	Batch interface	As transactions commit
Accruals & settlement	D365 Rebate Management	Integrated to ERP	Integrated to ERP	Native
Extra platform to run	None	Separate SaaS	CRM platform	None
AI for business users	TPM Code IQ in M365 Copilot	Vendor AI	Vendor AI	Generic Copilot
Data for analytics & AI	OneLake via Fabric link, no ETL	Vendor cloud, exported	CRM cloud plus ERP feeds	OneLake via Fabric link

Typical architecture per category; individual vendors and implementations vary. D365 standard: Trade allowance and Rebate management, Microsoft Learn.

ARCHITECTURE

Native, not bolted-on

One platform from target to settled claim, whether your ERP is Dynamics 365 or SAP.

Microsoft 365 Copilot · TPM Code IQ
17 trade-promotion skills, reading and writing through the Dynamics 365 ERP MCP server

TPM Code
Targets · baseline · deals · sales plans · P&L · guardrails · rebates · reconciliation

Dynamics 365 Commerce & Supply Chain
Unified pricing · orders · invoices · claims · Rebate Management · workflow · security

Demand Planning | Business Performance Planning | Power BI | Dataverse & Fabric

TWO WAYS IN

Dynamics 365 Finance & Operations

TPM Code runs inside your ERP. Pricing, orders, invoices and settlement are native, with nothing to integrate.

SAP or another ERP

Dynamics 365 Commerce becomes the pricing, order and TPM layer, while your ERP stays the financial system of record.

Every commercial number on one Microsoft platform

TPM Code inherits the platform: ERP, low code, analytics and AI on one data estate.

AI and agents Microsoft 365 Copilot · Copilot Studio · Microsoft Foundry	TPM Code IQ and your own agents read and act on live records through the Dynamics 365 ERP MCP server, within each user's security role.
Microsoft Fabric OneLake · Lakehouse · Power BI	Link to Fabric puts Dynamics 365 and TPM Code tables in OneLake in Delta format, without ETL pipelines. Join them with retailer POS, syndicated and supply data.
Power Platform Power Apps · Power Automate · Dataverse	Extend screens, approvals and alerts with low code, and start flows from business events such as a deal approval.
Dynamics 365 + TPM Code Finance · Supply Chain · Commerce	Deals, prices, orders, invoices, rebates, claims and the general ledger in one transactional data model.

WHAT IT MEANS FOR YOU

One identity

Entra ID and D365 security roles for people, reports and agents.

No TPM interfaces

Nothing to build, run or reconcile between TPM and ERP.

Analytics without ETL

Trade data reaches OneLake as it changes, with no pipelines.

One version of the truth

Sales, trade marketing and finance use the numbers finance closes on.

Microsoft Learn: 'Link your Dataverse environment to Microsoft Fabric'; 'Dynamics 365 ERP MCP server'. Features depend on licensing, version and region.

HOW IT WORKS

Start simple, close the loop, keep getting better

One closed loop from plan to settled claim.

1

PLAN

Get started quickly

- Customers, products, trade terms and targets load from Dynamics 365
- KAMs build promotions and sales plans

2

SIMULATE

Decide before you spend

- Baseline, uplift and full P&L per deal and plan
- Two-gate approval within the chart of authority

3

EXECUTE

Always know where you land

- Approved deals price orders and invoices
- Claims reconciled against rebate accruals

4

LEARN

The loop closes itself

- Recent estimate against target, live
- History refines baseline and uplift each cycle

CAPABILITIES

Nine capability pillars

One product covers the full cycle, from corporate target to settled claim.

PLAN

01 Target setting

Driver-based allocation of volume and profit targets to channels, accounts and SKUs.

02 Baseline forecasting

Sell-in and sell-out signals in one auditable baseline.

03 Sales planning

KAM workspace, deal versioning, P&L snapshots, two-gate approval.

DESIGN & SIMULATE

04 Promotion deal design

Price, display and co-advertising tactics; on- and off-invoice funding.

05 Volume estimation

Uplift from price, display and distribution, net of cannibalisation.

06 P&L simulation

One customer P&L across deal, sales plan and live plan; 20+ KPIs.

GOVERN & EXECUTE

07 Rebate engine

Normal and lump-sum rebates, settled in D365 Rebate Management.

08 Approvals & guardrails

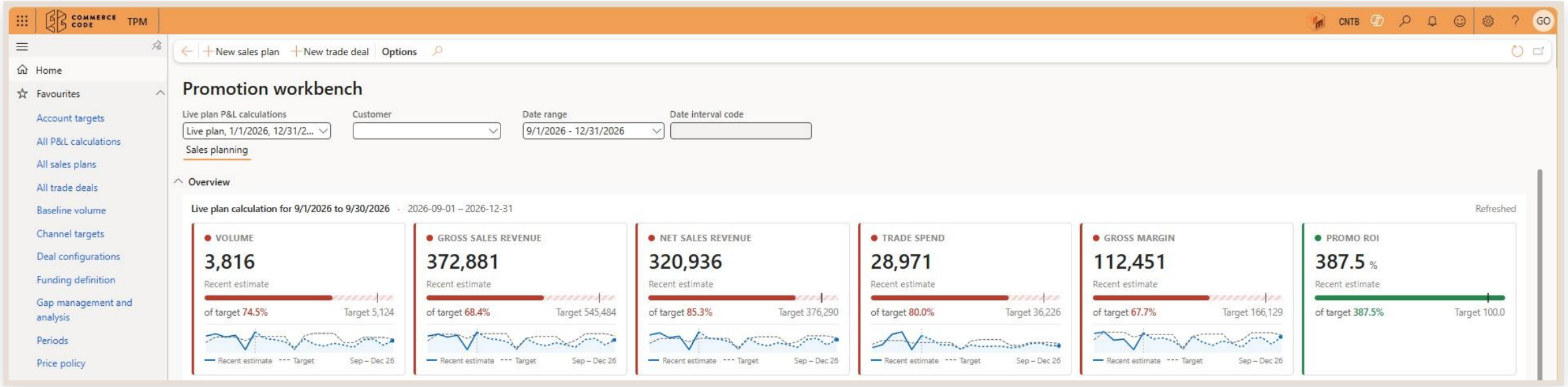
Role and threshold routing, price ranges, margin-erosion alerts.

09 Execution & reconciliation

Approved deals price orders and invoices; claims reconciled daily.

The seller sees where they stand, then acts

Live KPIs against target and budget, inside Dynamics 365.



1 See where you stand

Volume, revenue, trade spend, gross margin and promo ROI against target and budget.

2 Spot what is drifting

Status colour and trend line on every KPI, refreshed from the live plan.

3 Act without leaving

Raise a new trade deal or sales plan straight from the workbench.

See the year by period, not just the total

Estimated actuals, forecast, target and last year for every KPI.



1 Actuals meet forecast

Estimated actuals for closed periods, forecast for the rest, with a 'today' marker.

2 Gap per KPI

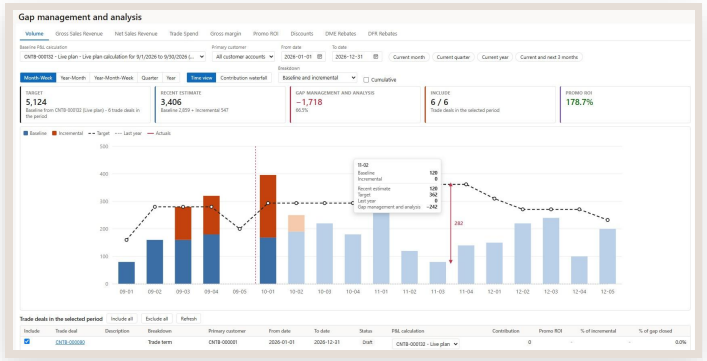
Each chart shows percentage of target and the absolute gap.

3 Slice it your way

Break down by period or component and group by year-month in the browser.

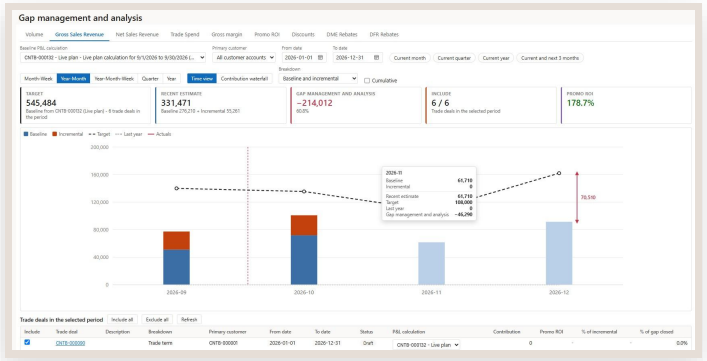
From gap to action in four views

One screen takes the seller from the size of the gap to the deals that close it.



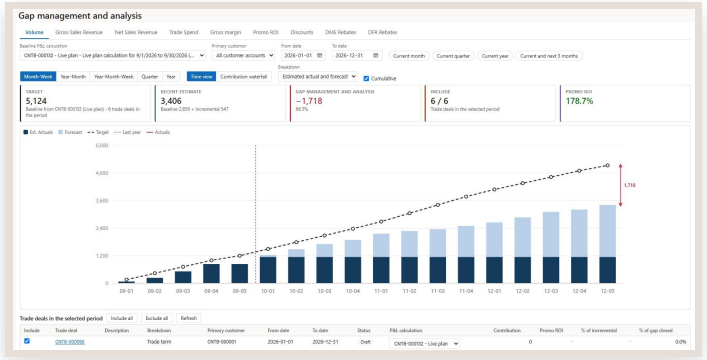
1 See the gap

Target, recent estimate and gap for every KPI, week by week.



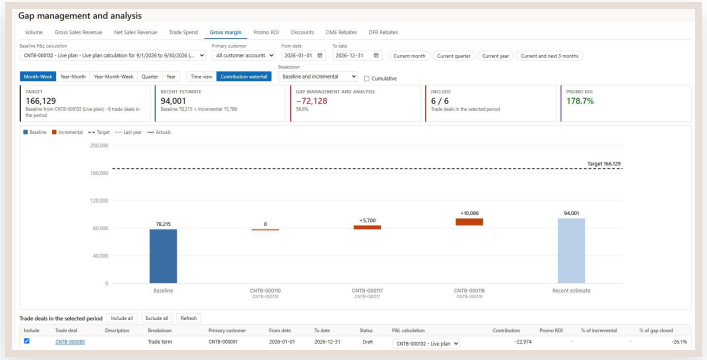
2 Change the grain

Week, month, quarter or year, with the gap measured at period end.



3 Check the landing

Cumulative view shows early whether the year will hit target.

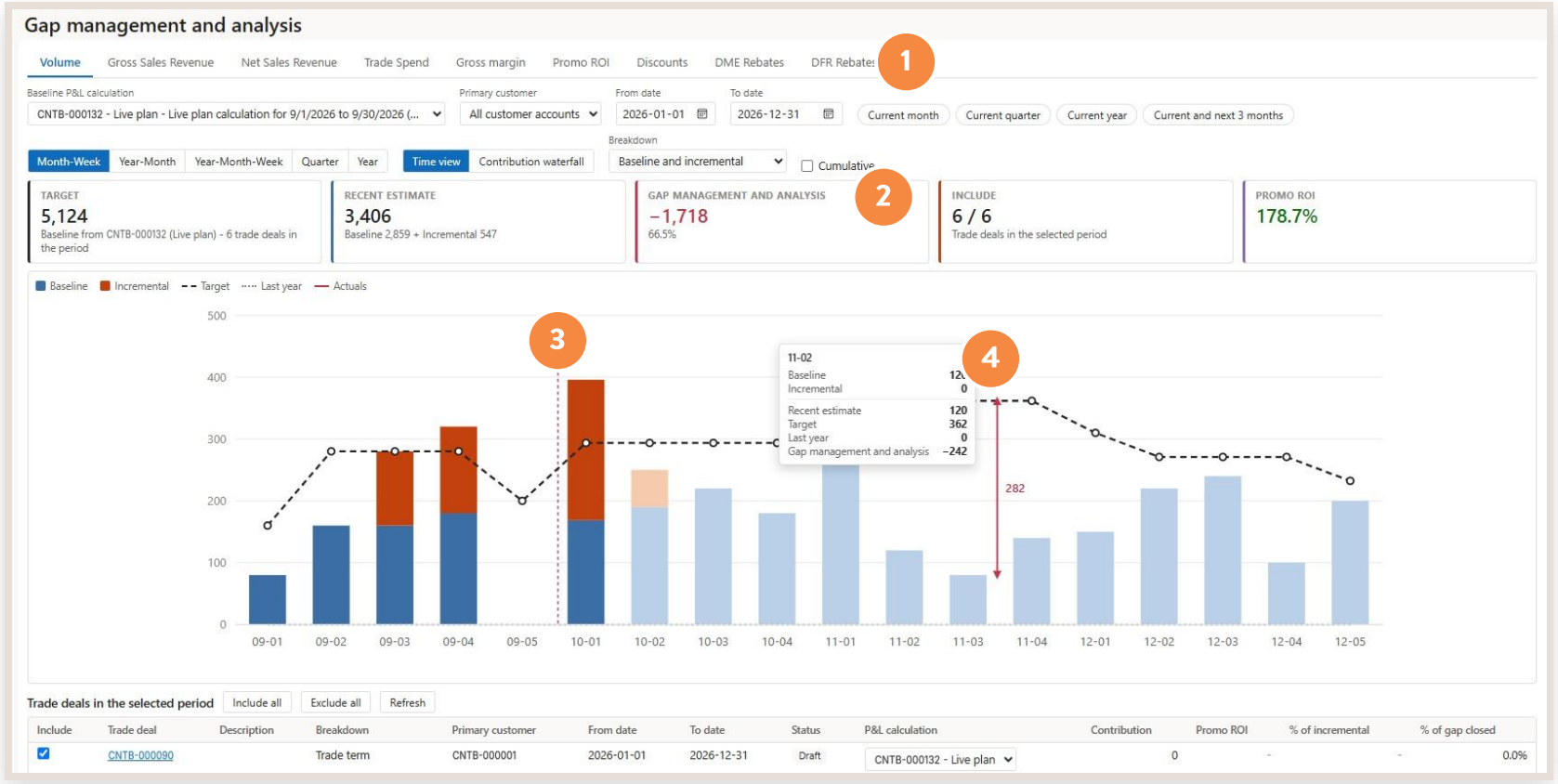


4 Find the deals

A contribution waterfall shows which deals close the gap.

See the gap to target, week by week

Target, recent estimate and the gap for every KPI of the customer P&L.



1 Nine lenses, one gap

Volume, revenue, trade spend, margin, promo ROI, discounts and rebates.

2 Gap in the header

Target, recent estimate, gap, deals included and promo ROI.

3 Actuals meet forecast

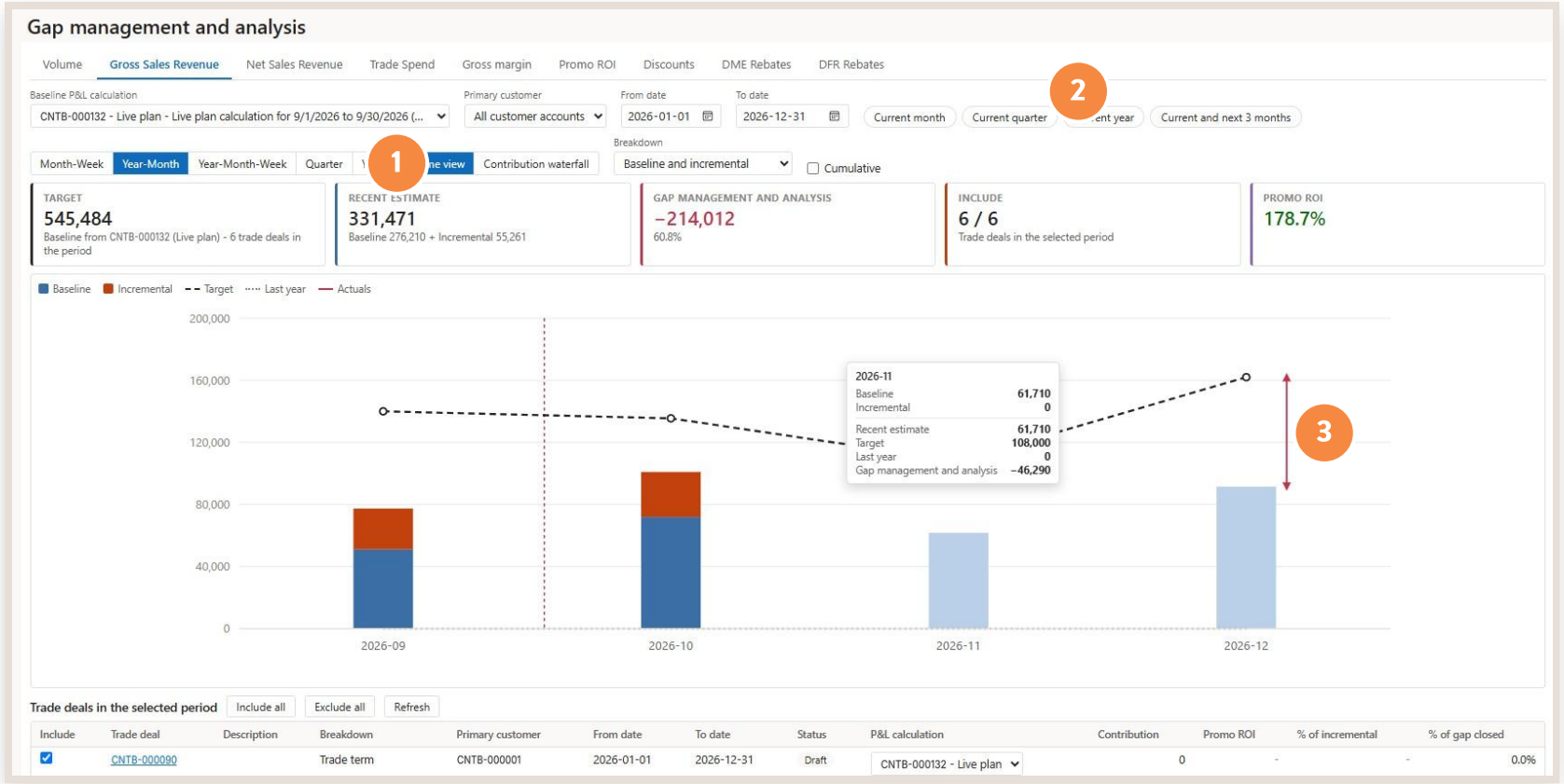
A 'today' line splits closed weeks from forecast weeks on one axis.

4 Hover for detail

Baseline, incremental, target, last year and the gap for any period.

Same gap, any time grain

Switch from weeks to months, quarters or the year without leaving the screen.



1 Five grains

Month-week, year-month, year-month-week, quarter or year, on any KPI tab.

2 One-click periods

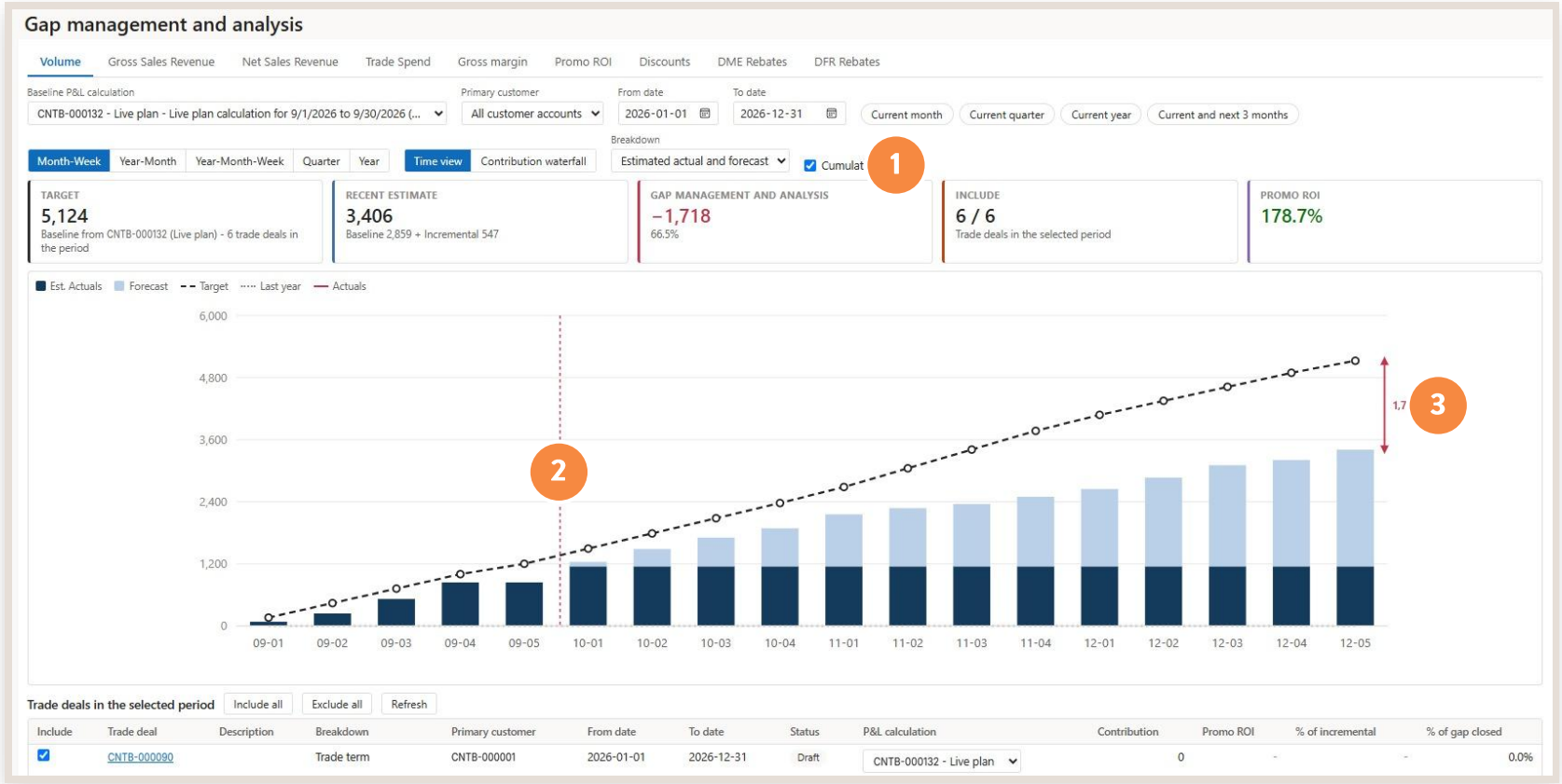
Current month, quarter, year, or current and next three months.

3 Gap at period end

The arrow measures the remaining gap to target for the last period in view.

Will we land the year?

The cumulative view shows the year-end gap while there is still time to act.



1 Cumulative switch

Running totals of recent estimate against running target, week by week.

2 Actuals, then forecast

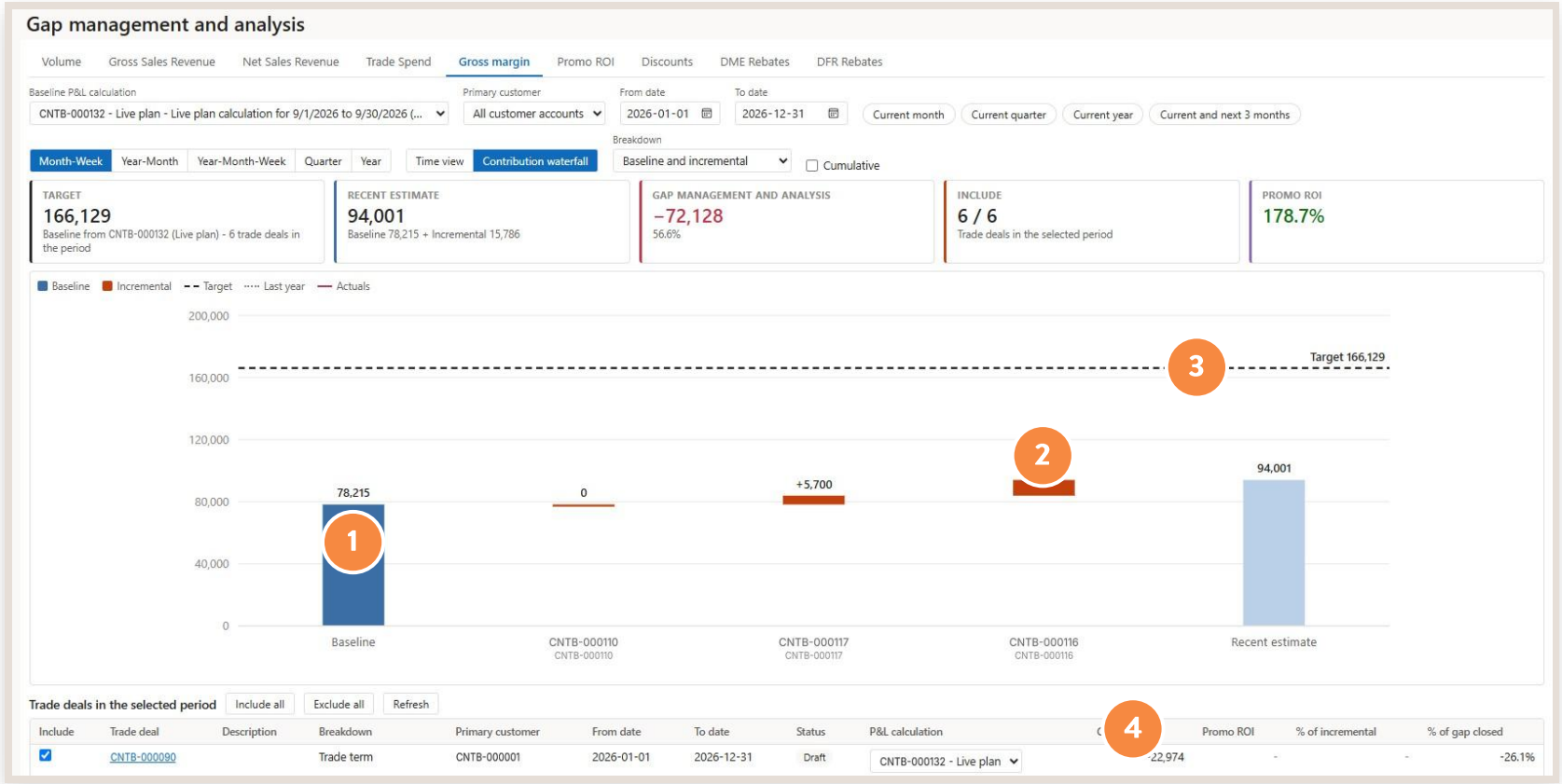
Dark bars are estimated actuals to date, light bars the forecast still to come.

3 Year-end gap

Volume lands 1,718 units short at year end, 66.5% of target: visible in October, not December.

Which deals close the gap

A contribution waterfall from baseline to recent estimate, against target.



1 Start from baseline

Gross margin without promotions, here 78,215.

2 Deal by deal

Each trade deal adds or removes margin, so weak deals stand out.

3 Against target

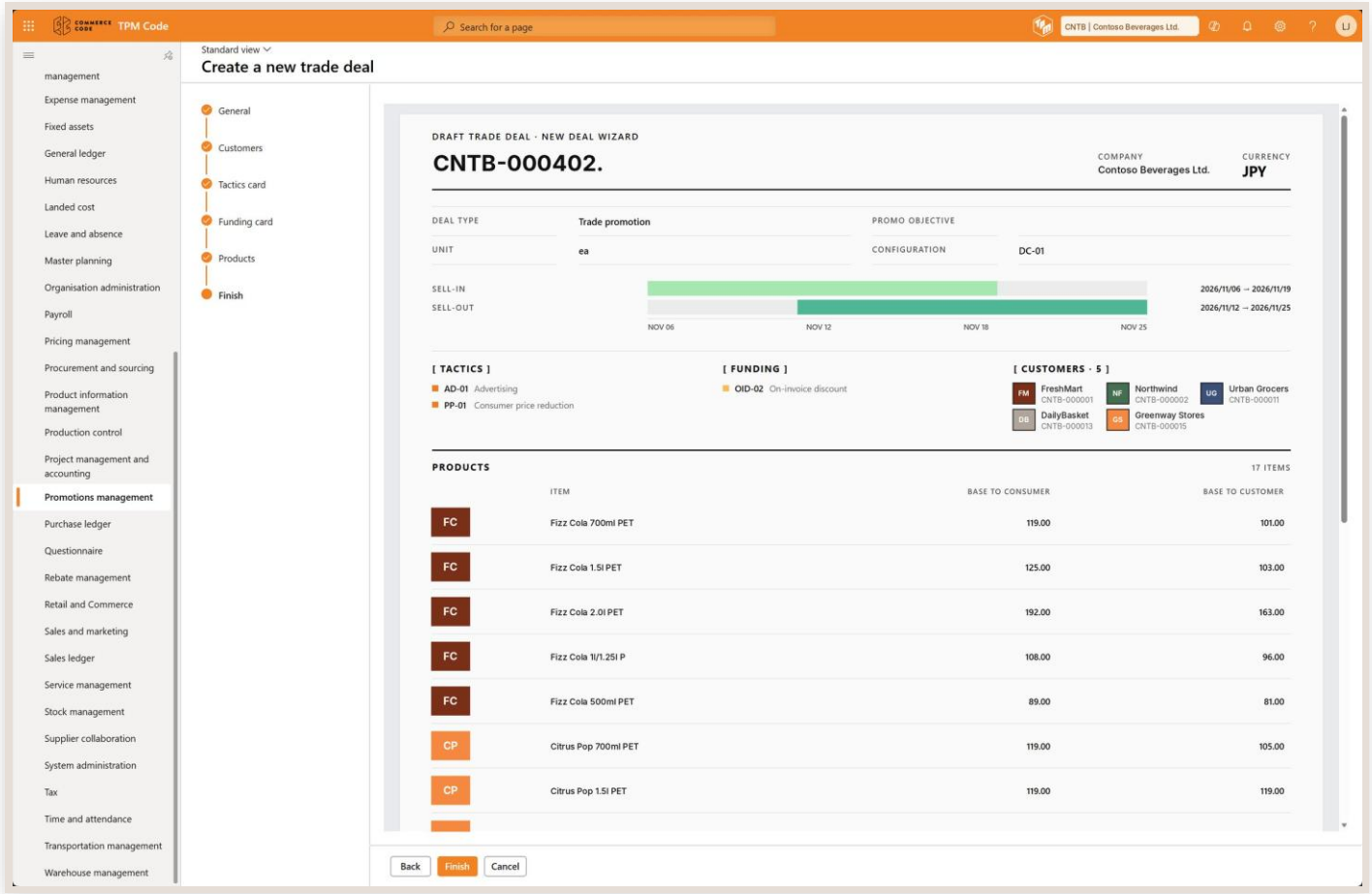
Recent estimate 94,001 against a target of 166,129.

4 Test the mix

Include or exclude deals and see contribution, promo ROI and % of gap closed.

Complex deals, built in minutes

A guided wizard in Dynamics 365 replaces spreadsheet deal sheets.



1 Five guided steps

General, customers, tactics, funding and products, inside the Promotions management module.

2 Dates on one timeline

Sell-in and sell-out windows side by side before you commit.

3 Customers in bulk

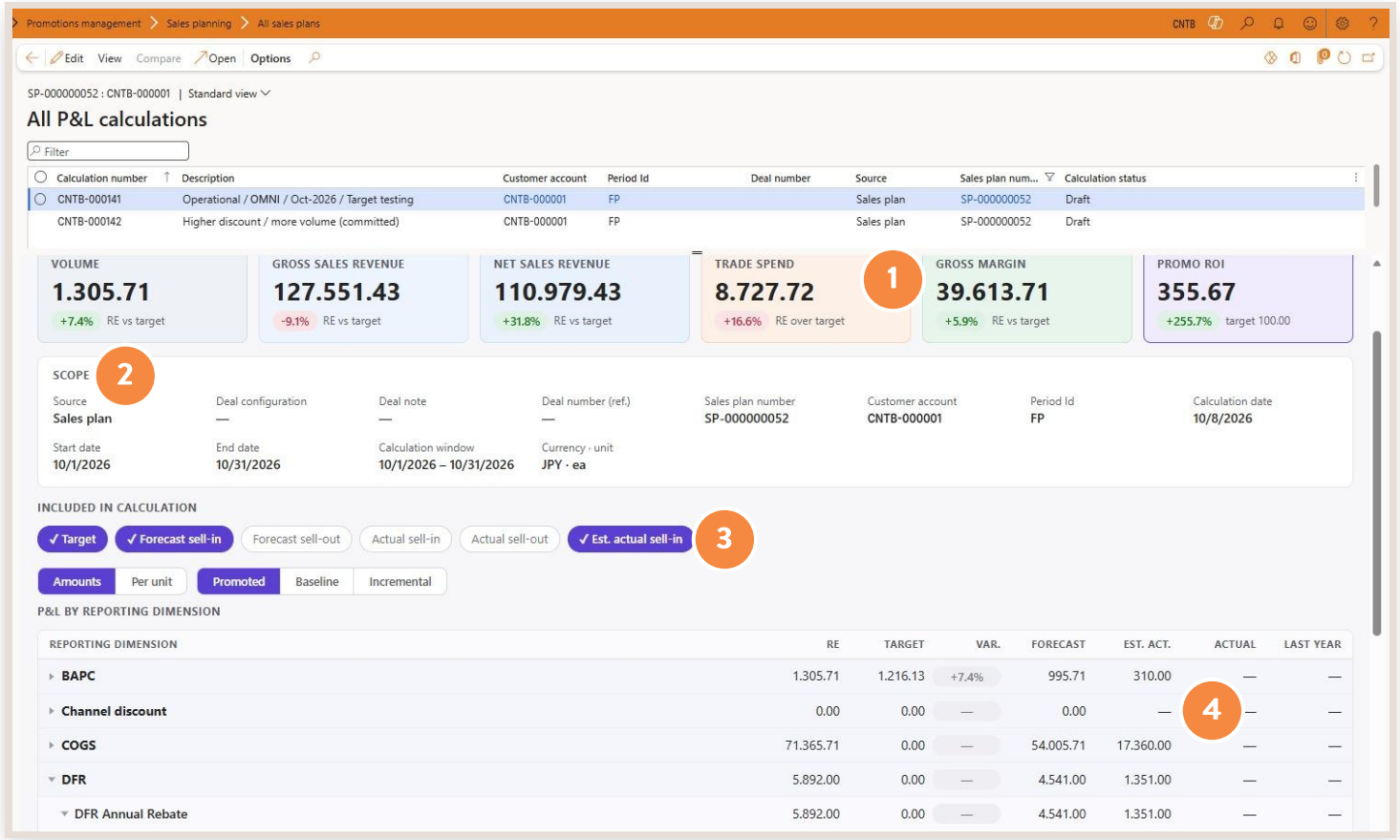
Retail accounts picked by attribute and hierarchy, not one by one.

4 Review, then finish

Tactics, funding and every product with base prices to consumer and customer.

Every number traces back to its source

A sales plan P&L for one customer and one month, line by line.



1 Six KPIs against target

Net sales revenue is 31.8% over target, but trade spend is 16.6% over budget: the trade-off is visible at a glance.

2 Scope you can audit

Source, sales plan, customer, calculation window and currency stated with the result.

3 Choose the inputs

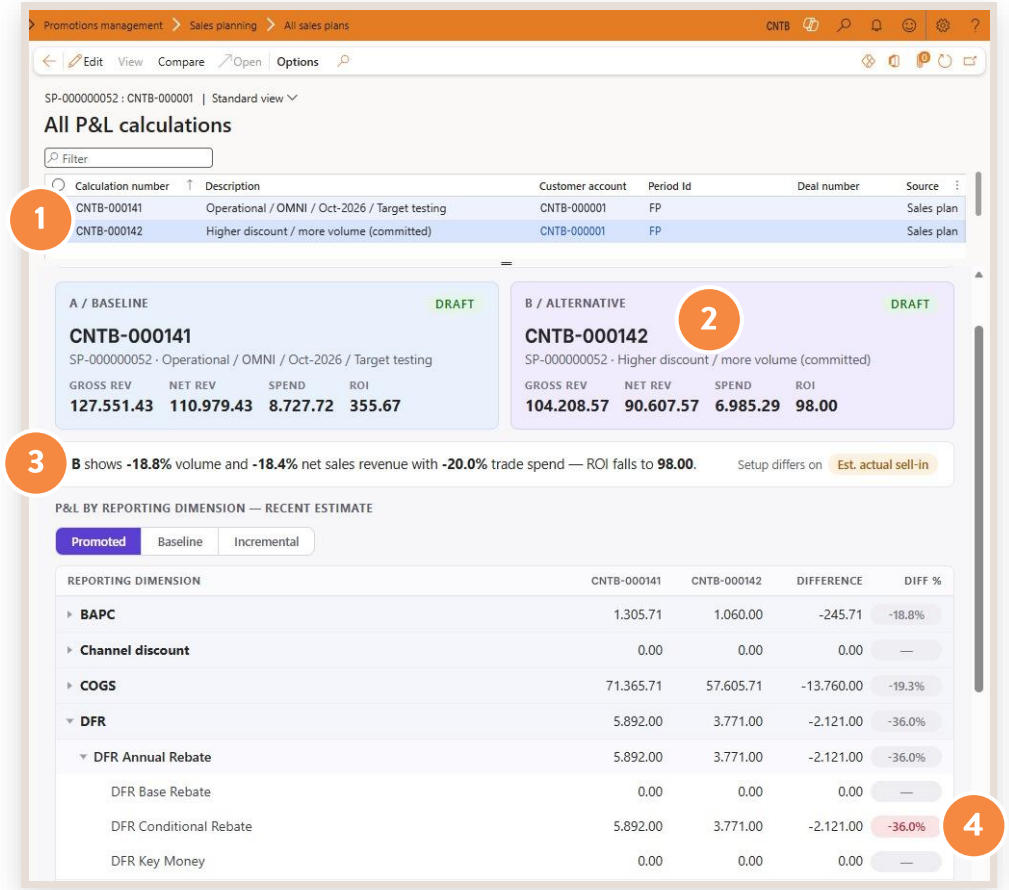
Switch target, forecast, actual and estimated-actual streams in or out, and view amounts or per unit.

4 Recent estimate, explained

Estimated actuals to date plus forecast to go: volume 310.00 + 995.71 = 1,305.71.

Test the alternative before you commit

Two P&L calculations side by side, with the verdict in one sentence.



1 Pick any two

Tick two calculations for the same plan: here the current plan (A) and a deeper-discount alternative (B).

2 Headlines side by side

Gross and net revenue, trade spend and ROI for each scenario.

3 Verdict in one sentence

B: -18.8% volume, -18.4% net sales revenue and -20% spend, so ROI falls from 355.67 to 98.00. The extra discount does not pay back.

4 Drill into the driver

Expand any line to its components: the DFR conditional rebate explains the -36%. A flag warns when the two set-ups differ.

GOVERNANCE

Margin protected at the point of entry

Controls finance can rely on, not discover at month-end.

Approved in TPM = executable in Commerce

Unapproved promotions cannot be priced, ordered, invoiced or claimed.

Two-gate approval

Workflow on each trade deal, trade term and sales plan, plus a locked P&L snapshot.

Price guardrails

Customer and consumer price ranges over time, stacked-discount checks, breach actions.

No double counting

Overlapping promotions are split so incremental volume is counted once.

Closed periods protected

Final actuals locked after close; any reopening is logged.

Full audit trail

Every change to terms, prices, deals, plans and approvals can be reconstructed.

AI-READY DATA

Your trade data is ready for AI from day one

Deals, prices and claims live in Dynamics 365, so Microsoft AI reaches them without a new data project.

ASK

Microsoft 365 Copilot + TPM Code IQ

KAMs and managers ask about deals, targets and the P&L in Teams, Outlook or Excel, answered from live records.

"Which accounts are trailing their volume target, and which deals would close the gap?"

ANALYSE

Microsoft Fabric + Power BI

Promotion P&L joined with retailer POS and syndicated data in OneLake; Copilot in Power BI and Fabric data agents answer in plain language.

"How did the real uplift of display promotions compare with the forecast last quarter?"

ACT

Copilot Studio · Foundry · Power Automate

Agents create and update deals through the Dynamics 365 ERP MCP server; flows react to business events such as a deal approval.

"When a deal is approved, notify the KAM and open the accrual review."

Same guardrails for people and agents: security roles, approvals and the audit trail apply to every AI action.

TPM CODE IQ

An AI layer in Microsoft 365 Copilot

Working on live TPM Code records, under the same governance.

Signal → Insight → Recommendation → **Approval** → Execution → Measurement

Ask in plain language

Analyse the trade-promotion book, explain a deal P&L or find accounts trailing target.

Morning recommendations

Scheduled runs re-read the live plan and refresh prioritised suggestions for every KAM.

Act on real records

Create or update deals, terms and plans in Dynamics 365 through the Dynamics 365 ERP MCP server.

Same governance

Every action stays within the chart of authority, approvals and audit trail.

17 skills: deals · trade terms · sales plans · approvals · baseline & uplift · targets · funding & tactics · pricing · rebates · claims · KPI & ROI analytics

VALUE

What good looks like

Control first, then value that compounds across the commercial P&L.

Less trade-spend leakage

Accruals, claims and settlement controlled against the approved plan.

Faster planning cycles

Guided, workflow-driven planning replaces spreadsheets and email approvals.

Better forecasts

Baseline plus incremental volume, refined each cycle and shared with supply.

Higher promo ROI

Every deal simulated before commit and evaluated after it runs.

INDUSTRY BENCHMARKS

10%+

gross profit uplift from RGM done well (Bain)

2%+

revenue growth within a year from one RGM capability programme (McKinsey)

Benchmarks are third-party results, not TPM Code guarantees. Sources: Bain, 'RGM Reset'; McKinsey, 'Revenue growth management: The next horizon', 2019.

ROADMAP

From TPM to a revenue growth platform

From a stable core to intelligence-driven planning. Items after this quarter are planned or proposed.

Q4 2026

IN PROGRESS

Stabilise & enhance

- TPM Code IQ agentic layer
- Gap management: volume, NSR, GM, TP ROI
- Conditional rebate accuracy
- UX improvements

Q1 2027

PLANNED

Execution support

- Deal discounts to the pricing engine price tree
- Tax-inclusive P&L for negotiations
- Store-level planning dimensions

Q2 2027

PLANNED

Optimisation & integration

- TP optimisation with Copilot
- Incremental volume parameter processing
- SFA integration on Microsoft Fabric

Q3 2027

PLANNED

Intelligence-driven planning

- Volume forecast ML model
- Joint business planning on sell-out data
- Automation of repetitive tasks

Q4 2027+

PROPOSED

Revenue growth platform

- Price pack optimisation
- Assortment and promo optimisation
- Prescriptive trade-investment advice
- Mobile KAM and claims automation

COMMERCE CODE

NEXT STEPS

How we start together

Product depth from Commerce Code, delivery scale from your system integrator.

COMMERCE CODE BRINGS

- TPM product IP, roadmap and releases
- Consumer goods and bottler expertise
- Solution design, configuration, enablement

SYSTEM INTEGRATOR BRINGS

- Customer relationship and business context
- Dynamics 365 delivery and multi-market roll-out
- Integration, change management and run

1. **Discovery workshop**
   Map your trade processes and P&L baseline
2. **Live demo with TPM Code IQ**
   Your scenarios in Dynamics 365 and Copilot
3. **Feature fit & sandbox pilot**
   Agree MVP scope for a first channel and entity

Get it on Microsoft Marketplace info@commerce-code.com · www.tpmcode.com · www.commerce-code.com

APPENDIX

Sources

Third-party figures used in this presentation.

- McKinsey & Company, 'Fortune or fiction? The real value of a digital and AI transformation in CPG', 3 October 2024. mckinsey.com
- McKinsey & Company, 'Revenue growth management: The next horizon', 16 October 2019. mckinsey.com
- Bain & Company, 'Why consumer product companies need to solve revenue growth management'. bain.com
- Bain & Company, 'RGM Reset: Capabilities for a Competitive Edge'. bain.com
- SAP News, 'SAP S/4HANA maintenance 2040: clarity and choice for SAP Business Suite 7', February 2020, restated October 2026. news.sap.com
- Microsoft Learn, Dynamics 365 Supply Chain Management: Trade allowance management and Rebate management overview. learn.microsoft.com
- Microsoft Learn, 'Link your Dataverse environment to Microsoft Fabric' and 'Dynamics 365 ERP MCP server'. learn.microsoft.com
- Vendor groupings on the market slides are based on public vendor websites reviewed in October 2026.
- Product screens: TPM Code in a Dynamics 365 demonstration environment.