

SALES ORDER MANAGEMENT APP FOR DISTRIBUTION

WHEN CUSTOMERS THROW YOU A CURVEBALL DURING ORDER ENTRY, BE READY TO HIT THE BALL OUT OF THE PARK.

ENAVATE's Sales Order Management App is a toolbox of order management features for Microsoft Dynamics 365 designed for distributors. This collection of features gives your organization the tools to better handle the requirements placed on distributors by their customers. Reduce order-entry errors, increase consistency and improve customer service by reducing workarounds.

The Sales Order Management App includes the following features:

1

ORDER TYPES

For most orders at a distribution company, the standard sales order workflow in Microsoft Dynamics 365 meets requirements. But there are still exceptions. This feature has templated several unorthodox order flows to help customer service reps process these orders more efficiently. This includes billing only, bill complete, bill now-ship later, sample orders and more.

These instances are frequently handled with workarounds, leading to inefficiencies and inconsistencies. With a templated framework, customer service reps will save time and improve service levels.

2

PRODUCT SETS

A Product Set is a list of items that can be sold (or not sold) to a customer. Most distributors sell diverse product lines and have a diverse customer base, and certain products may not be contractually available for certain customers.

The Product Sets feature solves this by allowing distributors to create inclusion or exclusion lists of items and assign them to customers, customer groups or even custom hierarchies of customers. The result is a powerful, flexible tool. This goes beyond geography-based restricted items in standard Dynamics 365.

3

PRODUCT SUBSTITUTION MANAGEMENT

Distributors commonly offer customers a different product if the ordered item is out of stock, or a cheaper product with the same functionality is available. This is product substitution. Distributors should consider substitutions to improve customer satisfaction, margins and inventory management. Standard Dynamics 365 is limited to offering alternate items only if an item is not available in inventory.

But distributors need more flexibility; this feature empowers distributors to create rules that offer alternatives based on relative margin, customer satisfaction and other factors, rather than just when an item is out of stock. The ENAVATE App applies these rules seamlessly during order entry.

4

CUSTOMER ORDER CUES

The Customer Order Cues functionality provides a consistent template for distributor reps to track required data for customer accounting departments to improve processing time and invoice-to-cash. For example, some customers want to record a cost center on every order.

The Customer Order Cues functionality allows distributors to customize and template additional fields within Microsoft Dynamics 365 Finance for specific customers or customer types; this makes order processing quicker and more consistent, and significantly reduces errors. It also adds value for the customer, who no longer has to track down that data on its own.



Enavate understands distribution. Enavate transforms wholesaler-distributors through Microsoft Dynamics 365 and AX technology. Equipped with experience, development credentials, deep knowledge of the wholesale distribution industry, and a reputation for disruptive innovation, Enavate helps distributors break through limitations in an increasingly crowded market. Learn more at enavate.com.

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