

# ENAVATE PRODUCT SUBSTITUTION MANAGEMENT APP FOR DISTRIBUTION

**DISTRIBUTORS HAVE COMPLEX NEEDS FOR MANAGING ITEM SUBSTITUTIONS THAT GO BEYOND MICROSOFT DYNAMICS 365 FOR FINANCE AND OPERATIONS.**

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 for Finance and Operations is limited to offering alternate items only if an item is not available in inventory.

But distributors need more flexibility; this app 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.

## BENEFITS

1

### GREATER CUSTOMER SATISFACTION

Ensure that customers don't have to wait because a product is back-ordered. Offer substitutions when an alternative is available. If a customer does not want a substituted item, ENAVATE's app allows specific-customer inclusions and exclusions.

2

### INCREASED MARGIN

It's not just about back orders. Improve your margins with a proactive substitution management strategy. And ENAVATE's substitution parameters and business rules ensure that subbed items won't deteriorate margin.

3

### IMPROVED INVENTORY MANAGEMENT

Take control of your inventory investment. ENAVATE's Substitution Management app enables a distributor to execute a substitution strategy that can drive more inventory turns and increase procurement efficient. Not only does reducing back orders make customers happy, it reduces the drain and expense that back-order processing has on your operations.

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Make the Future Work. Now

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# FEATURES

1

## SUBSTITUTION PRIORITY RANKING

Specify multiple substitutions per item and rank them by priority.

2

## HARD AND SOFT SUBSTITUTIONS

Substitute automatically or select a substitution only with user approval.

3

## PRICING AND MARGIN CONTROL

Preserve price from original to substituted item or choose to never substitute to an item if margin would go down.

4

## CUSTOMER-DRIVEN SUBSTITUTIONS

Specify site, warehouse, and even mode-of-delivery-specific substitutions. Specify substitutions across all customers and create exceptions where needed. Create substitutions for only one customer, or for specific customer groups. Allow for a customer to reject all substitutions.

The top screenshot shows the 'Item substitutions' form for item A0002 (HDMI 12' Cables). The 'General' tab is active, showing fields for 'To item' (A0002), 'Product name' (HDMI 12' Cables), 'Priority' (1), and 'State' (Active). The 'UNITS AND SUB TYPE' section has 'From unit' (pcs) and 'To unit' (pcs). The 'RELATION' section has 'Item relation' (All) and 'Item relation value' (11). The 'OPTIONS' section has 'Preserve price' (Yes), 'Do not sub if higher price' (No), and 'Allow lower CO percent' (0.00).

The bottom screenshot shows the 'Customer limitation' section. The 'Customer limitation type' is 'Allow only'. A table lists customer groups and their relation values:

Relation option	Customer relation value	Description
Group	30	Retail customers
Group	40	Internet customers

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](http://enavate.com).