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Catalog Based Sales

The Need

Sales order entry is a critical activity in customer focused businesses like distribution.

It may be the only regular point of contact with the customer—so the speed, skill, and knowledge that is shown by the order taker will have a major influence on that customer's perception of the whole company.

The Solution

An order-taker who can answer technical queries, offer substitutes, introduce promotions and understand typical buying patterns will leave a lasting positive impression.

Even if the order is being entered one step removed from the customer, e.g. via fax or order form, it is vital that the operator can record the order quickly and accurately with the appropriate information readily at hand.

Key Features

- **Catalog and screen search**

A new window called Catalog and Screen Search available from within sales transaction entry is used to drive all of the features described below.

- **Section search**

A new search criteria on catalog section name does not need to drill down through catalog levels.

- **Item catalog**

An explorer style arrangement of the entire inventory which allows the user to drill down through the catalog as a means of quickly identifying appropriate products.

Key Features cont'd...

• Item attributes

As well as the structured hierarchical approach the user can also search using unlimited item attributes to find items with a unique combination of features, e.g. 'find all nut free products in delicatessen products section of my catalog,' or 'find all blue paper that uses recycled material.'

• Item display

All selected items are displayed in 'list view' format. This offers the user a high level of control over the format of the display. For example the user can rearrange columns and immediately re-sequence information, perhaps to bring the most profitable information to the top of the list. There are options to show only those items that the customer has previously purchased* or those where there is stock available. The system administrator can even determine what information can be seen by individuals or groups of order takers. In some environments for example, margin information may not be relevant.

• Information point

Once an item is selected, the information bar will highlight where further information can be obtained for that product at the click of a button. This could include 'available to promise', substitutes, order history, access to item specifications and images. Key item information can even be emailed to the customer directly from the information bar.

• Fast order entry

The selected item can be dropped straight into the order. As soon as line entry is complete, focus will return to the catalog and search screen automatically.

What It Means For You

• Increased sales

The power of this module may reduce the risk of losing sales. The user can be easily prompted with substitutes and related products. There is also the facility to highlight items on promotion**. The operator can quickly identify where the customer has not purchased items that they usually order and then prompt them, and even view summary sales across previous periods***. Doubts and uncertainty about technical aspects of the product or its availability can be addressed by accessing the information bar.

• Increased profitability

Not only can the operator see margin information on screen, but lists of suitable items can be easily rearranged to bring the most profitable items to the top.

• Improved customer service

New sales order takers can quickly become experts via the use of catalog search and the information bar. Enabling them to add more value to the order and to the customer relationship with less training.

* When used in conjunction with Customer Templates
** When used in conjunction with Extended Pricing and Extended Pricing Enhancements   *** When used in conjunction with Sales Pattern Analysis

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Dynavistics transforms your "I wish we could" into "I know we can" with innovative solutions to provide relief from common business software frustrations—helping you to run your business more effectively and get paid faster. Our applications are used by businesses across a wide variety of industries to extend the useful lifetime of their software investment while improving staff productivity and filling the gaps in collections, delivery, trade promotion and distribution software processes.

Dynavistics makes it easy to integrate with Microsoft Dynamics GP, Microsoft Dynamics AX, and Microsoft Dynamics NAV, as well as other leading ERP systems. Whether your frustrations result from software shortcomings in purchasing, inventory management, or accounts receivable—we offer solutions that complete the processes and bridge the gaps.

TRINITY

Trinity from Dynavistics, Inc. is a collection of advanced distribution features that work hand in hand with Microsoft Dynamics® GP to enhance every aspect of your supply chain process. Simply put, Trinity turns the basic Dynamics GP inventory modules into a full-featured distribution powerhouse.

Running a successful distribution business requires more than just inventory management. That's why Trinity was designed to improve every aspect of your distribution operation from Sales, Pricing, and Customer Service to Purchasing & Replenishment, Inventory Control, and Delivery Logistics. Adding Trinity to Dynamics GP makes your business *more effective, efficient, competitive and profitable*.

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