Microsoft Dynamics™ AX

Advanced Distribution Partners

The Advanced Distribution Solution
for Distributors and Retailers

- **Warehousing, Procurement, and Supply Chain Management**
- **Fulfillment & Shipping, including Cross-Docking**
- **Point-of-Sale Integration, Automated Re-Stocking, and Vendor Managed Inventory**
- **Detailed Demand Trending, Analysis and Sales Forecasting**
- **Mobile Sales Force Support**
- **Contact Center & Ongoing Customer Management Support**
- **Special Promotions and Discounts**
- **Marketing & New Customer Acquisition**
- **Financial Risk Management**
- **eCommerce and EDI Integration**

CERTIFIED FOR
Microsoft Dynamics™ AX

Why ?

Advanced Distribution for Microsoft Dynamics AX is an end-to-end solution for Distributors and Retailers which comprehensively addresses:

- Warehousing, Procurement, and Supply Chain Management
- Fulfillment & Shipping, including Cross-Docking
- Point-of-Sale Integration, Automated Re-Stocking, and Vendor Managed Inventory
- Detailed Demand Trending, Analysis and Sales Forecasting
- Mobile Sales Force Support
- Contact Center & Ongoing Customer Management Support
- Special Promotions and Discounts
- Marketing & New Customer Acquisition
- Financial Risk Management
- eCommerce and EDI Integration

The Advanced Distribution solution fully supports multi-channel Distributors and/or Retailers, who operate in a traditional business-to-business setting, as well as those who sell direct to the consumer via the web, or any combination of the two.
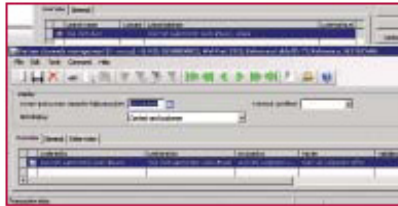
Advanced
Distribution
Partners

SUMMARY
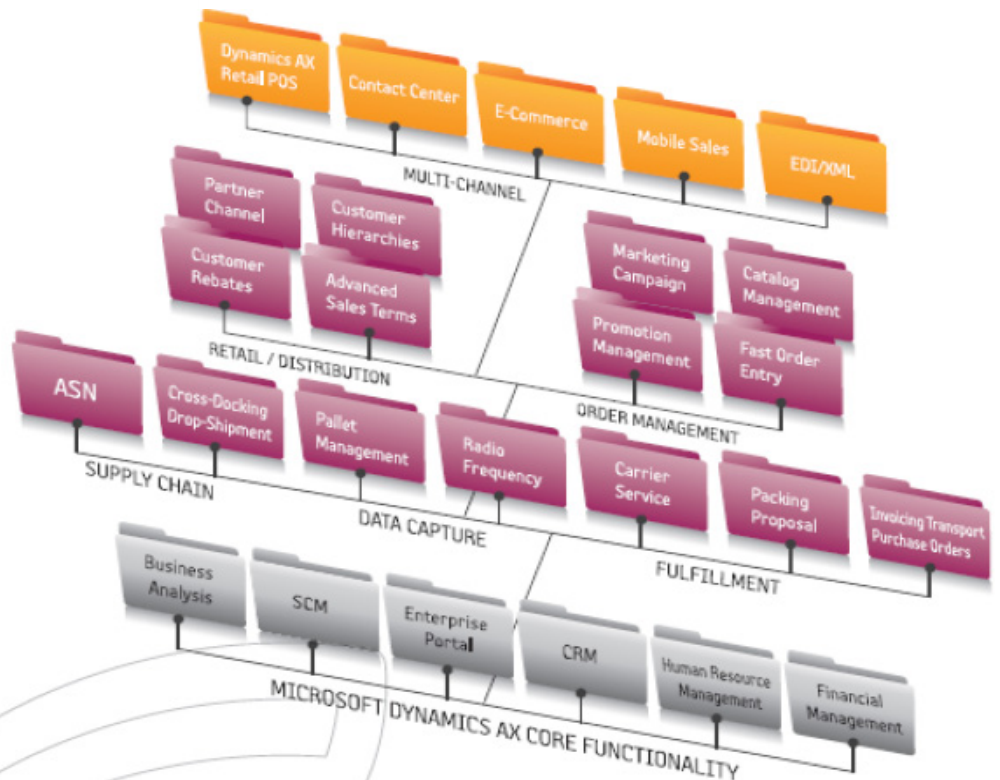
Customer Management

## Global Location Numbers - Multiple partner channels per customer

The following fields can be defined: Ordered by, Order to, Delivery to, Invoice to, Paid by, and Paid to. You may define additional customised fields as required (ex: Hub).

Partner channels may be defined with period management (past, present, future).

Customer Hierarchies

Hierarchies enable you to capture the purchase organisation of key account customers, such as customers inside a group, or members of a purchase pool. Hierarchies also enable you to define commercial and financial terms at any level, and inherit them at lowest level.
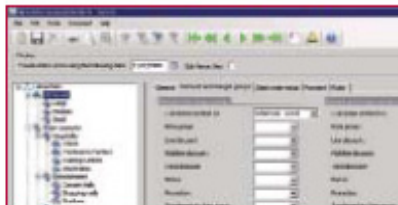
Customer Notes/Documents

Notes or documents can be attached to a customer record and printed on various sales documents including: confirmation slips, picking lists, packing slips and invoices. They can also be displayed for warning during order entry.

Advanced Pricing and Discounting

Calculation methods are defined by the business rules for calculating prices, discounts, charges and supplementary items such as free items or gifts.
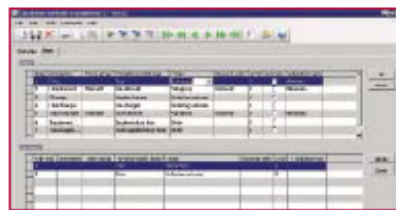
Our solution enables you to use different calculation methods depending on the customers you target, such as key accounts, large chains, supermarkets, single location stores, subsidiaries, B2C, etc. We offer different calculation stages including: gross price, line discounts, multi-line discounts, discounts on total, charges on line item, charges on header, and supplementary items including multi-line, item on total, contract consideration and welcome packs. Depending on the information entered or retrieved in the order and the customer record, the customer hierarchy, or a sub-group which combines multiple origins, our solution enables you to easily search for the best price/discount combination. By having the system and the business rules drive the price discounts, you can preserve your gross margin and increase overall earnings.

Coupons

Coupons are used to assign a total discount and/or to define supplementary items. They may be set up for one time use or multiple time use, depending on the coupon type.

Promotion Management

Promotions may be applied to price, line discounts, additional items and charges. Promotion triggers may be included or excluded, for example for all customers except in a certain group, or to all customers linked to a hierarchy for one item.

Customer Contracts

You can manage different contract types, advertising contracts, or indexed contracts depending on: material and/or market price, general terms, warranty and return conditions, payment and delivery terms, contracts period of validity and status, incoterms for contract and sales orders, prices, discounts, charges and supplementary items, and commitments on quantities/volumes. If authorized by your company headquarters, the contracts may be copied from one company to another.

Customer Bonus & Rebates

End of period rebates can be applied to items, customers or hierarchies.
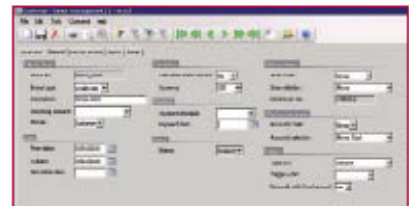
Item Classification

Item hierarchies make it possible to categorise items into as many as 6 hierarchical classification levels. You can select items in all item searches, for example, during order-taking, define price conditions, such as discounts and charges, and do statistical analyses at any classification level.

Multiple Barcodes Management

Advanced Distribution enables you to manage multiple barcodes of different types, such as UPC, GTIN, and EAN, by item, by unit and by quantity.
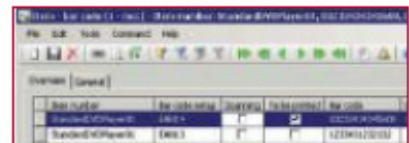
Order Management

Fast Order Entry for Call Centers

The dedicated order taking screen allows your call center representative to easily access a 360 degree view of the customer. Within a single screen, your reps can search business relationships and contacts according to different criteria, such as prospect, suspect, and customer, or contact name, city, zipcode, and phone. This single screen enables your reps to view the entire history of the caller for better service.

When a call is initiated it is often difficult to know whether the caller is looking to place an order or receive a quote. To streamline the process, Advanced Distribution allows you to create the basket first, and later indicate who the customer or prospect is, and whether they are looking to submit an order or receive a quote. If the customer already exists in the database, they are automatically recognized by the automatic detection, to avoid duplication.

Item line/basket entry can be done via assortment, for example by only the items referenced to one customer/hierarchy, by all items belonging to a family/sub-family, by all items which can be cross-sold together, and by all equivalent items that can create

opportunities for up-selling or down-selling. The line entry can also be done via the catalog display, so your contact center representatives have the same view as your customers who are looking a paper catalog or the company website. This enables a smoother transaction between your customers and your representatives.

Advanced Distribution also provides a closing and order summary at the end of the transaction. This shows the representative the quantity and cost of the order, and helps the rep identify potential data entry errors, issues such as exceeded or overdue credit limits, and the workflows that will follow this order. Advanced Distribution also provides possible delivery dates - taking the supply chain lead-times into consideration, such as procurement, manufacturing, stock, transportation and customer's constraints, and allows the representative to change the order, delivery address and transport services for all order lines. Credit card authorisations are also enabled from the summary screen if required.

Website Integration

Advanced Distribution enables website integration for product catalogs, price lists, customers/addresses/contacts, and sales orders. In order to ensure no

company downtime, our e-Commerce solution can work without a connection to Advanced Distribution. That means, if your connection is lost, your transactions can be queued and then updated at reconnection.

Point of Sales Integration

Advanced Distribution integrates with several POS systems for product catalog, price list, transfer order shipments, transfer order receipts, inventory updates, customers/addresses/contacts, sales orders, sales order payments, sales orders invoices, and customer returns.

POS can work without Advanced Distribution connections, so even if your connection is lost, your shop/cashier can continue to perform transactions, which are then updated at reconnection.

Diary of Sales Order and Quotation Events

The Advanced Distribution diary traces any modifications, additions or deletions of data that relate to every sales order and quotation. The diary function allows sales reps, sales supervisors and anyone involved in the sales order process to quickly access the entire history for a given order. It allows you to easily create manual events in CRM, such as activities and complaints, and to create follows up, and manage open and closed events.

Addresses

Addresses are defined in a structured way depending on countries, and may be controlled via a QAS interface.way depending on countries, and may be controlled via QAS interface.

Detecting Duplicate Contacts and Customers

Define which fields to use for duplicate checks, and when to activate duplicate control.

Diary for Business Relationships and Contact records

The diary traces every modification, addition or deletion of data related to business relationships and contacts.
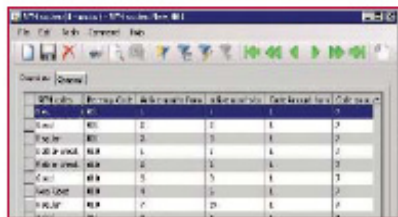
Managing Customer Calendars

The receipt calendar is used in the algorithm to calculate the delivery date.

Managing Authorizations

Define the communication channels not authorized by a business or contact, for example, no email.

RFM Segmentation of Customers

Advanced Distribution allows you to segment your customers based on how recently they purchased from you, the frequency of their purchases, and the monetary value of their purchases.


Managing Marketing Campaigns

To encourage your customers to buy more from you, Advanced Distribution can add significant information to your direct mail and mail orders, including links to sales terms and promotions, and links to catalog(s).

Catalog Management

Manage sales references, pages, periods of validity, catalog design status, catalog languages, catalog currency, price campaign links, and catalog types (newsletters, pre-printed order forms, paper catalogs, and virtual catalogs/ web pages), and add images or URL links to your pages and items.
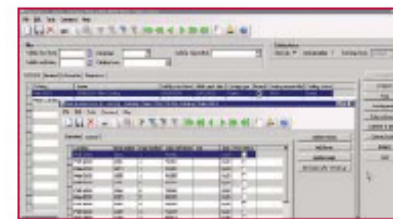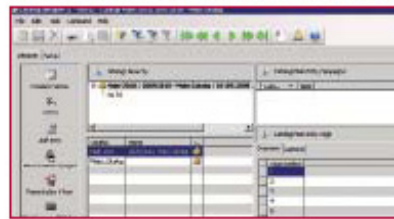

Catalog Requests and Direct Mail Advertising

Design catalog campaigns that include one or several catalog sub-campaigns, and link them to one or several catalog-type activities. Effectively track the shipment of catalogs to current or prospective customers, and manage catalog demands.

Manage Marketing/Sales Activities

Perform a detailed analysis of the return on your marketing investments by effectively tracking and measuring where your sales come from. By tracking your marketing activities and sales references, you can automatically search related sales terms and activities that triggered the sale, and determine which activities are working for you and which are not.

Since an item (SKU) can appear in various forms of commercial media and have several sales references (such as catalogs, flyers and referring websites), it is important to determine which form is leading to the most sales, so you can effectively direct your marketing budget.

Welcome Pack

Welcome packs are automatically assigned to new customers during their initial order entry. Welcome packs may contain product catalogs, coupons for a future purchase, contact details and other marketing materials.

Welcome Call

Manage your welcome calls for new customers. Customers who are placing their first order can be targeted for a follow-up phone call or e-mail, and can be assigned to a relevant mailing campaign.

Kits & Special Items

The Kit function has a Bill of Materials type structure, however the sales order line is for the entire kit. This simplifies ordering. The components of the kit are stocked and collected during picking and packing, and there is no need to create a production order.

Special items allow you to create an item directly during the quotation or sales order entry process.

Managing Sponsors

Sponsors are managed in Advanced Distribution at the level of the customer contact. Sponsors may have discounts on sales order total and/or supplementary items and gifts.

Managing Complaints

Advanced Distribution allows you to effectively manage and resolve complaints, so you can keep your customers happy.

Advanced Distribution manages receiving, qualifying, recording, tracking, analysing, assigning and validating the complaints, and tracks the corrective and/or preventive actions to satisfy the customer. Complaints can be created from the order header, as an order line or through the business relationship.

Manage Competitor's Items and Prices

Advanced Distribution allows you to enter you competitor's items and prices into the system, and gives you the visibility your sales force needs to keep product pricing responsible, and compete effectively.

Supply Chain Management

Vendor Contract
You can manage different contract types, advertising contracts, or indexed contracts depending on: material and/or market price, general terms, warranty and return conditions, payment and delivery terms, contracts period of validity and status, incoterms for contract and purchase orders, prices, discounts, charges and supplementary items, and commitments on quantities/volumes.
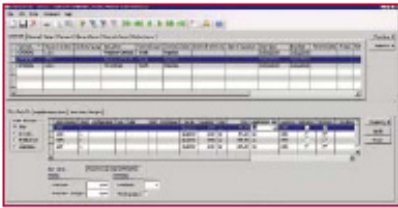
Vendor Bonus/Rebates
End of period rebates can be applied to items, vendors and vendor groups.

Vendor Calendars Management
You can manage you purchase order calendar, vendor capacity calendar, and vendor shipment calendar, all depending on logistical flow (stock, drop-shipment, cross-dock).

Vendor Backorders Management
Purchase planners can search purchase orders, depending on consequences in the sales order.

Automated Cross-Docking & Drop-Shipping Notices
Stock, drop-ship and cross-dock logistical flows can automatically be managed inside Advanced Distribution sales orders. Automatic updates of multiple lines logistical flows are performed during the closing of orders.

For example, if the customer wants a complete delivery, the «Drop-shipped» lines are changed to «Cross-docked» if multiple vendors are involved. The shipment and receipt dates are re-calculated accordingly.

Detect Exceptional Orders
Advanced Distribution enables the automatic detection of exceptional order lines during sales order entry. This can be configured depending on logistical flows, ABC classification,

safety stock, forecast, fixed quantity, sales history and amounts.

Vendor Managed Inventory (VMI)
Advanced Distribution allows you to consigned inventory to customers with periodic consumption and invoicing. In this case, a warehouse is defined for each customer site, and minimum stock levels or forecasts trigger needs from the central warehouse. Transfer orders for supplying the VMI warehouses are created automatically, and automatic control of stock availability is managed by the central warehouse. The stock required automatically creates the sales orders based on consumption by the VMI warehouses.

Data Capture

Automated data capture
Advanced Distribution allows you to access orders and transaction feedback (item arrival, put away, stock counting, transfer, picking, production consumptions, production results, lot info and status) via portable terminals.
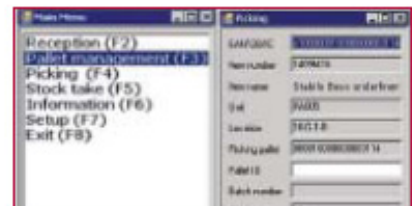
Fulfillment

Carrier

In Advanced Distribution, your vendor is linked to the carrier for transport orders and invoices. Transport can be proactive or reactive on purchases, sales and transfer orders. Reactive means that the transport order will be created manually by the logistics manager, whereas proactive means that the transport order will be created automatically during PO or SO entry with automatic selection of carriers/services.

Advanced Distribution also enables you to attach an EDI label mode. Off-line mode indicates that the information is printed on a label, whereas on-line mode indicates that the SSCC identifier is printed on the package and a file (IFCSUM) is sent to the carrier, who scans the package to retrieve the IFCSUM information.

Carrier Services

Each carrier provides different services, such as express delivery in one area in one day with high cost, normal truck delivery in the same area in two days with lower cost, mail delivery, or airplane delivery to foreign countries etc.
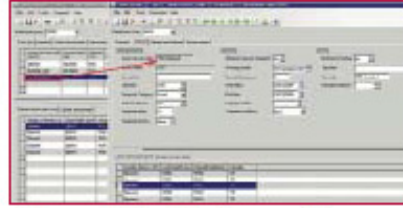

Advanced Distribution enables you to set and determine the transport cost with a combination of flat rate, total price, price per package and transport point.

Transport Orders

Transport orders can be defined by zone, date and type (delivery, receipt, and drop shipment). Processes include: check, calculate and consolidate the transport order, confirm the transport order has been recorded with the carrier, confirmation, printing the transport slips, and generating transport purchase orders.

Packing Proposals

Packing proposals are created according to the transport points, and based on the packing groups/types of items.
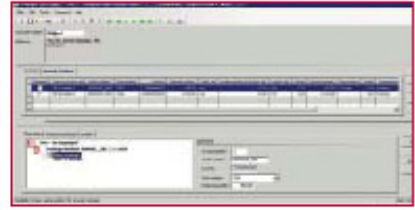
You can print packing label in EAN format, or with SSCC codes using EAN128.

Invoicing Transport Purchase Orders

Depending on the transport mode, the purchase orders of transport may be grouped with several order lines. Different carrier service items can be created for the same transport order. The service items can vary according to the price calculation (by weight, by distance, fixed rate, etc.).

Real time . Integrated . Sustainable . Scalable . Flexible

COUNTRIES SUPPORTED

Australia	Denmark	Ireland	Norway	Thailand
Austria	Estonia	Italy	Poland	Turkey
Belgium	Finland	Latvia	Russia	UK
Brazil	France	Lithuania	Singapore	USA
Canada	Germany	Malaysia	South Africa	Japan
Canada	Hungary	Mexico	Spain	
China	Iceland	Netherlands	Sweden	
Czech Republic	India	New Zealand	Switzerland	

TRANSLATIONS SUPPORTED

Brazil Portuguese	Estonian	Icelandic	Polish	Thai
Czech	Finnish	Italian	Russian	Arabic*
Danish	French	Latvian	Simplified Chinese	
Dutch	German	Lithuanian	Spanish	
English	Hungarian	Norwegian	Swedish	

Solutions that are Certified for Microsoft Dynamics have demonstrated development quality and compatibility with Dynamics product. VeriTest, a service of Lionbridge, performed independent and rigorous testing on the solution's integration with the newest version of Microsoft Dynamics AX.

In order to ensure quality customer service, partners who are authorized to sell the certified solution must be enrolled in a Microsoft Partner Service Plan and have earned the Gold Certified Partner status within the Microsoft Partner Program. They also need to have customer who have been successfully using the certified solution and are willing to recommend it.

Advanced **Distribution** Partners

The Advanced Distribution Software Partners support multi-channel Distributors and Retailers by offering industry expertise and sophisticated software solutions to help streamline processes, improve customer service and better manage the supply chain. As a powerful group of dedicated professionals, we are able to offer those in the Distribution space something different – results. We provide top of the line software solutions, coupled with deep Distribution industry knowledge, to help Distributors and Retailers improve their margins.

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