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eBECS Retail Accelerator for Microsoft Dynamics

Overview

The eBECS Retail Accelerator for Microsoft Dynamics builds upon core functionality to offer an end-to-end solution for retailers and wholesalers with trade counters.

Traditional retail is changing, with customers no longer content to shop solely in stores. In today's omni-channel retail environment there is the need to support the increasing number of ways customers interact with retailers and to support the increasing number of journeys across multiple sales channels.

By being able to offer their customers a consistent experience irrespective of sales channel, retailers can increase both sales and customer loyalty by removing doubt with customers about how and when they can return goods, completing a sale even when goods are out of stock with a particular store, and providing timely responses to customer

queries whether made in-store, online, via a call centre or by social media.

In a digital world, successful retailing is not just about investing in customer-facing media and channels, such as e-commerce, mobile applications, social media and point of sale technology, but also having the supporting logistical systems to ensure that the right products are available at the right price at the right time.

The eBECS Retail Accelerator adds core functionality to Microsoft Dynamics to support retailers in achieving this — specifically small to medium size retailers, as well as those who operate trade counters. It also provides the option of a fully integrated point of sale solution for small retailers, or a toolkit for integrating third-party point of sale solutions for those retailers looking to protect their investments in existing point of sale solutions.

Colour/Size Products

Retailers, wholesalers and distributors often cope with product variants such as colour and/or size of products by having separate item references per product. The addition of colour/size matrices is specifically suited to (but not limited to) fashion and home furnishings. Using easy to use matrices, order entry and purchasing staff can simply configure quantities of colour/size products without having to enter individual document lines.

Standard size and colour ranges can be defined and assigned to products. Item variants can be easily created for allowable combinations by accessing a product matrix against the parent item. Matrices also allow information specific to an item variant (such as bar codes, customer cross-references and supplier cross-references) to be entered in a grid format as opposed to amending each item variant individually. For products where the colour or size may affect the sales or purchase prices, additional matrices are provided to allow pricing to be entered in a grid format.

Product imagery may be stored at item, item colour and item variant level, ensuring accurate product representations are visible on sales, purchase and transfer documents and the colour/size matrices. Colour swatches can also be defined. These can be useful when dealing with home furnishings for example, in both print media and online. A number of colour models are supported to define a colour swatch or an image can be uploaded to reflect a pattern.

The colour/size matrices also allow visibility of current stock availability, thereby avoiding the need to check availability on each item variant.

Colour/size matrices are available from the sales quote, sales order, sales invoice, sales credit memo, sales return orders and sales blanket orders, allowing easy input of colour/size quantities on sales documents. From a purchasing perspective colour/size matrices are available on purchase quotes, purchase orders, purchase invoices, purchase credit memos, purchase return orders and requisition worksheets. Quantities can be entered by order processors directly into the matrix or can be automatically allocated from a total quantity based on defined colour and/or size profiles, past sales/purchases of the item or sales/purchases of an equivalent product. For internal movements of stock and stock replenishment, matrices are also available from transfer orders and range plans.



Ratio Packs/Pre-Packs

Retailers and distributors handling colour/size products will often purchase items in pre-packed configurations based on a colour or size distribution. Ratio packs are a convenient method of configuring pre-defined ratios of colour/size products and managing them through the supply chain.

Ratio packs can be created for any suitable products (such as those with colour/size item variants). Any number of ratio packs may be defined per product allowing true flexibility in the procurement of goods in ratio pack quantities

Within the ratio pack a matrix allows the ratio of sizes, or colour/size combinations to be defined. This can be done manually or generated based on the total pack quantity required and utilising prior sales and purchasing information of the same or a similar product.

Ratio packs are treated as a virtual item throughout the system and therefore the same analysis and functionality is available for ratio packs as for standard items. Ratio packs can have their own bar codes, supplier cross-references and pricing agreements. Item availability views of the component items can be configured to either include or exclude ratio pack stock allowing immediate and accurate views of stock levels irrespective of if they are held in ratio packs or not.

Items can be purchased from suppliers in combinations of ratio packs or as individual items reducing order processing and receipt overheads. Ratio packs may have unique product references per supplier and specific pricing agreements. When applying additional costs such as landed costs or other handling charges, the costs are applied per ratio pack and then allocated at the point a ratio pack is split into its component items.

Items held in ratio packs can be handled in their ratio pack quantities including receipts, internal movements, replenishment to stores and physical inventory counting. Ratio packs can be configured to automatically be broken down into their component items at the point of receipt into specific location types, for example stores, to minimise the handling required. Batch processes also allow the warehouse to break down their stock of ratio packs into their component items at any point in time. This can typically be after initial stock allocations have been sent out, if there is a shortage of individual items, to pick stock for alternative sales channels (such as e-commerce) or when a product is reaching the end of its sales cycle.





Pricing, Promotions and Cross-Selling

Whether in a retail or distribution environment, sales pricing and promotions can be key factors in attracting new customers or boosting sales. The sales pricing and promotions module enhances the existing sales pricing functionality and adds functionality to support sales promotions.

For retailers, location (or store) based pricing can be created and typical retail-based promotions created globally or based on stores. For distributors promotions can target specific customers or customer groups.

Both sales pricing and promotions can be tied to sales channel allowing different pricing and promotions to be determined based on the sales channel, such as retail, e-commerce, outlet or trade counter. When utilising e-commerce or point of sale solutions the sales pricing and promotions module allows Microsoft Dynamics to become the master of product, pricing and promotion data that can be fed to other solutions. This removes duplication of data entry and supports omni-channel journeys in today's retail environment.

Sales pricing in Microsoft Dynamics is further enhanced to support pricing in retail environments. In addition to customer, campaign and currency pricing, pricing policies can now be determined based on store pricing groups, allowing different stores to have different prices.

Pricing can also be based on sales channel — for example, retail stores, outlet stores, e-commerce or trade counters. Pricing is further enhanced by allowing Recommended Retail Prices (RRP) to be held in addition to sales pricing for label production and pricing analysis.

Cross-sell and up-sell functionality has been provided for additional options on sales documents. When entering a sales document, if an item entered is related to an applicable sales promotion this will be highlighted allowing the order entry operator to prompt to see if the customer wishes to take advantage of the promotion and add other applicable products to the order.

Sales documents will also suggest related items that have been configured on the system or product suggestions based on other customers' buying history.

Promotions Management

Sales promotions can be configured based on a set of rules that determine the items that can trigger a promotion and what the reward for the item can be. By setting rules the promotions module allows full flexibility in the types of promotions that can be defined.

Item eligibility can be determined based on individual items or rules based on brand, season, style, item hierarchy or item attributes. Multiple rules can be defined — for example, ensuring one or more products from different categories have to be bought, such as a ‘meal deal’ offer.

Promotions may be limited to eligible customers or require a coupon code to be provided or scanned at the point of sale. In addition to pricing-based rewards, bounce-back coupons can be issued to encourage further purchases. When used in conjunction with the integrated point of sale solution, promotion coupons can be printed automatically on a receipt printer.

Promotion templates can be configured if similar promotions are often offered or if a promotion is created based on a similar successful promotion.

When a supplier funds a promotion this can be managed through supplier supported promotions. When a free gift is provided by the supplier, this can be entered on the system as a special item that will not create internal financial transactions. Where a supplier funds a promotion, costs relating to the promotion can be tracked and reclaimed through a supplier rebate.

In order to ascertain the success, or failure, of a promotion, analysis of a completed promotion is essential. Analysis is possible against either an individual sales promotion or the impact of all promotions across a range of products such as a particular brand, season style or product grouping. Information on the items that were applied to a promotion is held against posted documents for analysis. This information is readily available allowing ad-hoc reporting within Microsoft Dynamics or using Microsoft Power BI for detailed analysis.

Trends relating to an item, brand, season style or item hierarchy group can also be viewed when deciding which items to include when configuring a sales promotion. Repeat sales generated by issuing bounce-back coupons can be analysed by looking at bounce-back coupon utilisation.



Retail Replenishment

To support retailers, Microsoft Dynamics' existing replenishment functionality has been enhanced. New replenishment metrics of Coverage and Weighted Coverage have been added.

Range Plans allows product ranging and initial stock allocations to be determined, on an individual store, store grading or store area, and stock to be replenished based on the range plan. Further enhancements support stock recalls and the identification and re-allocation of overstock.

To support the bulk import and creation of new products an Item Import Worksheet has been created allowing retailers to take new product information provided by suppliers and create items and pricing records.

To support food products Microsoft Dynamics' existing strong lot/batch control functionality has been enhanced with 'Best Before' and 'Display Until' dates.

Internal requisitions allow stores to request non-sell items that they require, such as till rolls, light bulbs and cleaning products. These requests can then be included within the next replenishment to the store thereby reducing costs by not sending these items separately.

Integration with the eBECS Distribution Accelerator provides further functionality to assist the smooth, cost-effective replenishment of stores using either internal or third-party logistics.

These include cartonisation of products in boxes or reusable cartons such as tote boxes, roll cages or pallets, integration with third-party courier systems to deliver or collect stock from stores and support for recording and report on losses in transit. For procurement of goods, support for rebates, letter or credit, container and landed costs management have been added.

To support omni-channel retailing, orders for home delivery placed in-store using the integrated point of sale solution or via e-commerce integration can be seamlessly fulfilled. This is achieved by integrating these orders within the standard warehouse process and minimising the overheads of picking and shipping these orders via a combined picking process and automated booking of courier collections as part of the shipping process.

One view of the data allows for goods returned either in-store or to a warehouse location dependent on the rules set up within the system. The single view of transactions across the solution allows returns to be seamlessly handled.



Store Management

For any retailer, restaurant chain or pub company, its outlets represent both the core of the business and its main point of contact with its customers.

Managing stores includes ensuring they are appropriately stocked and replenished, in a good state of repair, hold the correct product mix, are in the correct location, are open when the customer requires them, and are able to be located by the customer.

The store management module holds information against a store that can be used to update a website or answer customer queries in respect to opening hours or their nearest store. Stores can be classified based on grading or definable attributes allowing a store estate to be profiled.

In conjunction with the eBECS Property Management Accelerator, maintenance tasks can be raised and managed to ensure that stores are operational and in a good state of repair. Costs such as maintenance, lease costs and service charges can also be tracked against each store allowing the true profitability and impacts on cash flow of a store to be assessed.

A store hierarchy can be defined which allows statistical information against a store to be viewed at any number of grouping levels which could be based on region, store classification or store format. Information can be filtered based on such criteria as dates, sales period, sales channel, dimensions, brands and seasons and viewed via tabular, tree map or report formats.

Sales performance, inventory value, direct purchases, replenishments, shrinkage, top item performers and item aging can easily be viewed per store or across a level of a store hierarchy.

Stores can be assigned a store grade manually or this can be dynamically calculated based on a combination of sales performance, sales density and floor space. Grading provides a way to classify stores and aids range planning and stock allocation.

Stores can also be displayed on a map view, with each store represented by a pin that can be colour-coded based on information such as sales performance, current inventory, chain, price group, promotion group, grade and area, allowing a quick visual view of the performance of the store estate.

Stores are also able to requisition non-sell items that they require, such as till rolls, light bulbs and cleaning products. These requests can then be included within the next replenishment to the store.



Integrated Point of Sale

Retailers and wholesalers with trade counters have traditionally coped with disparate point of sale and back office solutions. By contrast, the integrated point of sale solution provides a modern multi-language and multi-currency point of sale solution running within Microsoft Dynamics that can work on either traditional point of sale hardware or tablet devices allowing true flexibility in-store.

The point of sale solution fully supports the pricing and promotions functionality allowing these to be set up in a single area to cover a multitude of sales channels, therefore removing duplication. Store price and promotion groups allow different pricing and promotions to be set for different classes of stores. Coupons to drive future sales can be generated and printed from receipt printers. In addition, gift card management allows the sale and redemption of gift cards of different types whilst also allowing the expiration of credit and providing the necessary accruals in the financial ledgers.

Multiple layouts may be designed for each till to best support different devices or functions. For example, for a garden centre a coffee shop may have an optimised layout compared with other tills. Users may also simply define shortcuts for popular items, look-ups or tender amounts.

The point of sale solution can run either as a truly online solution with infrastructure at a separate location or in a distributed mode with each store running independently and synchronising transaction back to the central server, therefore providing resiliency in the case of communications downtime.

Store management is further enhanced by the implementation of the integrated point of sale solution by including end of day reconciliation and banking functionality.

For trade customers, account sales are fully supported and utilise Microsoft Dynamics' standard sales ledgers. The solution also supports yard sales where a collection document is generated at the point of sales to be taken to a collection point.

The solution also allows web services to be deployed to support e-commerce applications. This allows retail transactions to be created for e-commerce sales, truly supporting omni-channel retailing such as click and collect or allowing returns to stores. The interface can also provide the promotion and gift card engines to e-commerce platforms allowing these to operate across all sales channels.





Support for Third Party Point of Sale

For retailers and wholesalers who either require specialist point of sale solutions or wish to utilise legacy point of sale systems, this has traditionally required either double entry of product and pricing information or complex custom integrations.

In today's omni-channel retail environment this is further complicated by the need to support the increasing numbers of ways customers interact with retailers and to support the increasing number of journeys across multiple sales channels.

The point of sale integration toolkit adds functionality to integrate existing or future point of sale systems and to provide a framework to allow data synchronisation between the systems, supporting various channels such as retail point of sale, e-commerce, call centres and social media.

The eBECS Retail Accelerator for Microsoft Dynamics' point of sale integration toolkit allows product and pricing information to be set up once in Dynamics and synchronised to each sales channel that requires it. Additional information such as stores, currencies, exchange rates and employees can also be synchronised depending on the point of sale system, therefore having a single set of data. Sales channel or store group pricing and store product ranging are also supported.

Transactional data originating from call centres and e-commerce platforms can be synchronised to the point of sale system allowing customers to make returns in-store and for the point of sale to be aware of the original transaction irrespective of the originating sales channel.

Retail transactions from the point of sale are replicated within Microsoft Dynamics allowing stock changes to be accurately reflected, sales analysis to be performed across channels and goods bought in-store to be returned through other channels such as a call centre.

Financial transactions originating from the point of sale system such as cash receipts, banking and till and safe discrepancies are automatically reflected in the accounts area of Microsoft Dynamics allowing full integration.

The point of sale integration toolkit contains a mapping tool that allows users to define the format of base data to be synchronised and transaction data both being imported from the point of sale system and exported to the point of sale system to support returns in store that originated from other sales channels. Default mapping templates are available for point of sale systems supporting the IXRetail POSLog Schema.



Item Configurator

Many organisations have the requirement to offer customers made-to-order products or personalised items. By allowing workflows to be defined for item configurations, organisations have full flexibility in designing how the item configurator will operate, allowing it to cope with a range of different product scenarios such as:

- Engraved jewellery
- Made to measure home furnishings
- Products with fabric options
- Printed apparel
- Custom product configurations
- Hampers

From sales documents users will be prompted with the item configurator wizard when entering an item that can be configured. The wizard takes the user through a series of steps based on a pre-defined worksheet. Steps can be questions, product option choices, optional extras, related services, measurements or item personalisation information.

At each step a history of previous selections is made and users are able to step backwards through the history to amend previous choices. Images may be displayed to clarify information, show product images, material samples or personalisation samples.

The item configurator allows dynamic pricing to be displayed at each step of the item configuration. As each change or selection is made the running total is dynamically updated. Where product options or service choices are displayed the difference in price in selecting that option is shown allowing employees to convey the costs of all choices made.

Calculations can be embedded into the item configurator workflows allowing material requirements to be calculated. For example, pricing for made to measure curtains can be dynamically calculated on a material cost per square metre based on the material requirements and a set of entered measurements

The item configurator allows organisations to offer personalised products. These can range from engraved products such as jewellery to printed goods or personalised sports apparel. Workflows allow text to be entered to personalise products, as engraving or printing or to add additional letters or numbers for inclusion in the assembly of specific items. Character ranges allow the characters that can be used to be defined, along with limits on the number of characters that can be included. Previews of different personalisation options can also be displayed as images to aid with choice.

Retail Analysis

Implementing an integrated system covering the full omni-channel retail environment — from distribution through to multiple sales channels — unlocks the potential for a retailer to truly analyse their customers' buying behaviours and use the information to improve ranging and product availability and predict future trends.

Analysis tools throughout the retail functionality have been designed to make the information collected as valuable as possible.

WSSI (Weekly sales, stock and intake) analysis can be used to plan and monitor sales and stock on a weekly (or user definable) basis. A WSSI allows retailers to efficiently manage stock based on a sales forecast and actual sales and stock information. The aim of the WSSI is to maximise sales with the minimum of outlay by ensuring that stock levels are controlled effectively. It also helps to measure the impact of current trading conditions going forward and assists the business to keep markdowns to a minimum.

Financial reporting improvements allow stock to be valued at the retail method of costing in addition to standard inventory costing methods. This extends to inventory valuation, item expiration and item aging reporting. Tools also allow inventory to be revalued if the retail value of an item falls below the inventory cost value held on the system, allowing far more accurate reporting and accounting of inventory value.

All retail transactions, whatever the source, are stamped with the sales channel and location (if applicable) allowing true analysis of the profitability and impact of different sales channels and individual stores.

Standard graphical views against entities such as items, item variants, stores, sales channels, brands, seasons, styles or even particular colours or sizes allow users to simply see key metrics like sales value, profitability, top performing items, item aging (inventory turns) and item expiration.

Sales promotion analysis allows users to view the impact of a particular sales promotion against baseline sales of an item. Retailers can therefore monitor the impact of sales promotions on overall sales and whether a particular promotion causes an uplift in overall sales or just influences customers to buy one product over an alternative product, therefore reducing overall profit margins.

In addition to the built-in additional reports and analysis views, Power BI can be fully integrated with Microsoft Dynamics to provide user definable dashboards and analysis across the solution.





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