

Sporting Goods Retailer Transforms Operations and Gains Better Control with Dynamics 365 for Finance and Operations

Customer: A leading distributor and retailer of sporting goods and athletic equipment, footwear, and apparel.

Size: 201-500 employees

Region: Texas, USA

Industry: Retail

Profile: The client provides a turnkey solution for equipment, apparel, footwear, team uniforms and training aids, and features the latest in brand-name gear that helps athletes affordably play and look better.

Services: Dynamics 365 for Finance and Operations

Business Need

As a leading multi-channel internet retailer, the client serves consumers and team athletes through print and digital catalogs, targeted websites, and a retail store. It offers the best selection in brand names that players recognize.

The retailer was using Dynamics AX 2012 R3 to manage brick-and mortar and online stores, point-of-sale registers, products, and product catalogs. The system provided retailers a single run-time engine for commerce and helped control all channels - in-store or online.

Due to business expansion and increase in product offerings, the retailer experienced rapid growth, which led to greater volumes of transactions and inventory levels. This had direct impact on the retailer's AX system as it became unstable resulting in lengthy outages. To overcome this and keep up with the pace of change, the retailer sought to expand the capabilities of its AX system – introduce new end user experience, accommodate increased demand for real-time access to data from any device, optimize supply chain, incorporate demand forecasting and analysis, integrate the system with productivity tools, and more.

The retailer realized that the solution to its requirements was to upgrade its Dynamics AX 2012 R3 system to Dynamics 365 for Finance and Operations.

The retailer had already worked with Synoptek to successfully migrate its IT infrastructure from Rackspace to Microsoft Azure, so Synoptek had in-depth knowledge of the retailer's business model and technology environment.

The retailer engaged with Synoptek as the preferred Microsoft Dynamics Partner to carry out the upgrade project.

Solution and Approach

Through a series of workshops, Synoptek performed the upgrade assessment and evaluated the retailer's existing Dynamics AX system. Synoptek worked side by side with the end users to ensure smooth deployment and knowledge transfer. After identifying the customization and interfaces that were no longer required, and considering the current and future needs of the retailer, Synoptek began the upgrade process.

Synoptek used Microsoft Dynamics Lifecycle Services (LCS) code upgrade service and Visual Studio tools to migrate code and metadata from Dynamics AX 2012 R3 to Microsoft Dynamics 365 for Finance and Operations.

The upgrade process involved two acts:

Code Migration:

a) Auto-migration using the LCS Code Upgrade service: A migration service that takes a model store as input, to accomplish the following tasks:

- Convert metadata into the format
- Re-baseline metadata, by moving and merging into the right model
- Run migration rules that auto-migrate parts of solution
- Run migration rules to inform developers what to manually fix

b) Manual migration: After developers have onebox migration deployment ready, the application is compiled by fixing the compilation errors:

Application foundation:

- Manually fix merge conflicts
- Manually fix model split conflicts
- Manually fix compilation errors

Application suite:

- Manually fix merge conflicts
- Manually fix model split conflicts
- Manually fix compilation errors

ISV Model:

- Manually fix merge conflicts
- Manually fix model split conflicts
- Manually fix compilation errors

Re-baseline metadata by moving and merging into the right model

Synoptek followed a standardized upgrade methodology that ensured control, quality, and repeatability for many code upgrade activities.

Data Migration:

This includes configuration and setup, balances, open and pending invoices, and system configuration.

- Configuration and setup: Ledger, Customer groups, Vendor groups
- Master: Customer, Vendor, Project, Accounts
- Balances: Ledger balances, Stock, Prices
- Open documents and pending invoices: Sales order, Purchase order, AR invoices
- System configuration: Number sequences, Users, User groups, Security

The upgraded solution was seamlessly integrated with other productivity tools/platforms:

- API integration: Synoptek implemented following APIs for Shipping Carriers (United States Postal Service (USPS), Federal Express (FedEx) and United Parcel Service (UPS)) - Shipment API, Address validation API, Order tracking API.
- Warehouse Mobile Device Portal (WMDP) configuration
- Printer configuration
- Weighing scale integration
- Forter tool integration
- Market places/platforms: To sell products on Jet.com, Walmart, Amazon, and eBay.
- Electronic data interchange (EDI)
- Dynamics 365 Retail Store

The solution is developed to support two types of POS:

- Cloud POS
- Retail Modern POS (MPOS)

User training was provided throughout the upgrade process to ensure maximum uptake of new functionalities and full on boarding at cutover.

Business Results

With the upgrade of its existing Dynamics AX solution to the new Microsoft Dynamics 365 for Finance and Operations on the cloud, the retailer is now able to analyze data more efficiently and accurately than ever before with real-time access to required data and reports. It is able to create more accurate demand forecasts to improve products' availability and minimize inventory costs.

Users have the functionality to efficiently support a growing business. They can make smarter decisions with access to real time insights and intelligence on their preferred devices.

The solution includes a real-time, in-memory BI solution that provides the retailer with up-to-the-minute information around how its business is performing, with new tools for visualizing this data and creating dashboards.

Dynamics 365 for Finance and Operations has helped the retailer speed up business operations, and provided complete flexibility to grow at its own pace.

The retailer is now free to focus on what it does best: delivering outstanding services to customers while growing organically.

About Synoptek

Synoptek is a Global Systems Integrator and Managed IT Services Provider offering Comprehensive IT Management and Consultancy Services to organizations worldwide. Our focus is to provide maximum "business value" to our clients enabling them to grow their businesses, manage their risk/compliance, and increase their competitive position by delivering improved business results.