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

Customer: A leading distributor and retailer of sporting goods and athletic equipment, footwear, and apparel.
Size: 201-500 employees
State: San Antonio, Texas
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 Operations

Business Needs

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 Operations.

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

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

Solution and Approach

Through a series of workshops, Indusa performed the upgrade assessment and evaluated the retailer's existing Dynamics AX system. Indusa 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, Indusa began the upgrade process.

Indusa 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 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 a one-box migration deployment ready, the application is compiled by fixing the compilation errors:
- Application foundation:
  o Manually fix merge conflicts
  o Manually fix model split conflicts
  o Manually fix compilation errors
- Application suite:
  o Manually fix merge conflicts
  o Manually fix model split conflicts
  o Manually fix compilation errors
- ISV model:
  o Manually fix merge conflicts
  o Manually fix model split conflicts
  o Manually fix compilation errors
- Re-baseline metadata by moving and merging into the right model

Indusa 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
a) *Configuration and setup:*
Ledger, Customer groups, Vendor groups

b) *Master:* Customer, Vendor, Project, Accounts
c) *Balances:* Ledger balances, Stock, Prices
d) *Open documents and pending invoices:*
Sales order, Purchase order, AR invoices
e) *System configuration:*
Number sequences, Users, User groups, Security

The upgraded solution was seamlessly integrated with other productivity tools/platforms:
- *API integration*
Indusa implemented following APIs for Shipping Carriers (United States Postal Service (USPS), Federal Express (FedEx) and United Parcel Service (UPS))
  o Shipment API
  o Address validation API
  o Order tracking API
- *Warehouse Mobile Device Portal (WMDP) configuration*
This feature is bounded with Advance Warehousing and serves HTML pages to execute the work of warehouse
- *Printer configuration*
Document Routing Agent was configured to enable network printer devices
- *Weighing scale integration*
Metler Tolledo weighing scale was integrated with the upgraded system
- *Forter tool*
To provide accurate frictionless fraud prevention for enterprise online retail
- *Market places/platforms*
To sell products on Jet.com, Walmart, Amazon, and eBay
- *Electronic data interchange (EDI)*
To transmit orders to the designated vendor; HighJump tool was used for the integration
- *Dynamics 365 Retail Store CPOS was configured with the upgraded system*

The solution is developed to support two types of POS:
- *Cloud POS*
A browser-based POS that is used on mobile devices
- *Retail Modern POS (MPOS)*
Used on PCs, tablets, and phones to process sales transactions, customer orders, and daily operations, and to perform inventory management.

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 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.

Dynamics 365 for 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.

Accounts Receivable

General Ledger

INDUSA
Powering Business through Technology