Dynamics 365 for Operations Helps a Supply Chain Management Solution Provider Increase Customer Satisfaction and Reduce Costs

Customer: A leading global provider of customized supply chain management (SCM) solutions
Size: 201-500 employees
Region: New Jersey, USA
Industry: Supply Chain

Profile:
The client offers strategic sourcing and procurement, inventory management, fulfillment execution, kitting, inventory planning, and warehouse management services.

Services:
Dynamics 365 for Operations

Business Needs

Headquartered in New Jersey with operations worldwide, the supply chain management (SCM) solution provider offers global integrated procurement and supply-chain services to customers seeking to improve service levels, total landed cost, quality, and efficiency.

The SCM solution provider was previously part of a world-class SCM services company that offers global services and expertise in supply chain management, equipment integration, sourcing and distribution, engineering, and commercial-grade dedication to industries that include aerospace, industrial, nuclear, government, and oil and gas. To manage all aspects of the SCM cycle and beyond, the parent company used Microsoft Dynamics AX 2009.

After separating from its parent company, the SCM solution provider needed software to manage all its open transactions (unpaid or partly settled customer and vendor invoices), which were previously processed using the Dynamics AX 2009 system of the parent company. In addition to this, they wanted this software to provide features related to finance, inventory, procurement and sourcing, and quality management, along with payment automation capabilities.

The SCM solution provider recognized that Dynamics 365 for Operations was the answer to all their requirements. They wanted to implement Dynamics 365 for Operations in the minimum possible time with migration of all the open transactions and configuration of the required features.

Solution and Approach

The SCM solution provider engaged Indusa to implement Dynamics 365 for Operations based on their strong experience delivering Dynamics solutions globally.

After in-depth review of the SCM solution provider's needs and an analysis of where they were looking to grow, Indusa's D365 experts developed an implementation plan which included migration of all the open transactions and delivery of the required modules. The plan was developed to complete the project with a strict deadline.

Data Migration

Indusa carried out the data migration approach using Dynamics 365 for Operations data entities and the Data Management Framework, a downgraded version of AX's DXIF (Data Import/Export Framework). The data migration included:

- Configuration and setup: Ledger, Customer Groups, Vendor Groups.
- Master: Customer, Vendor, Item, Account.
- Balances: Ledger balances, Stock, Prices.

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- Open documents and Pending invoices: Sales orders, Purchase orders, AR invoices.

Module Implementation

Key modules incorporated in the solution are:

- Inventory Management
- Procurement and Sourcing
- Finance Management
  - Accounts Payable
  - Accounts Receivable
  - General Ledger
  - Cash and Bank
- Time and Attendance
- Product Information Management
- Credit and Collections
- Expense Management
- HR Management

To help the SCM solution provider manage supply chain activities for their warehouses globally, the system consists of the following capabilities:

- Automation of procure to pay and order to cash cycles
- Native integration with the Advanced Warehousing functionality in Dynamics 365 for Operations for Advanced Shipment Notice (ASN) and Goods Receipt Note (GRN) generation
  - Load Management
  - Purchase Order Cycle Management
  - Sales Order Cycle Management
- Automation and integration of warehouse, 3PL transactions and activities

Total Quality Management (TQM): Indusa helped the SCM solution provider setup TQM to provide real-time quality control of products, suppliers, customers, and all other business processes.

The solution is integrated with Microsoft Power BI to provide the SCM solution provider with out-of-

Workspace

Purchase Order
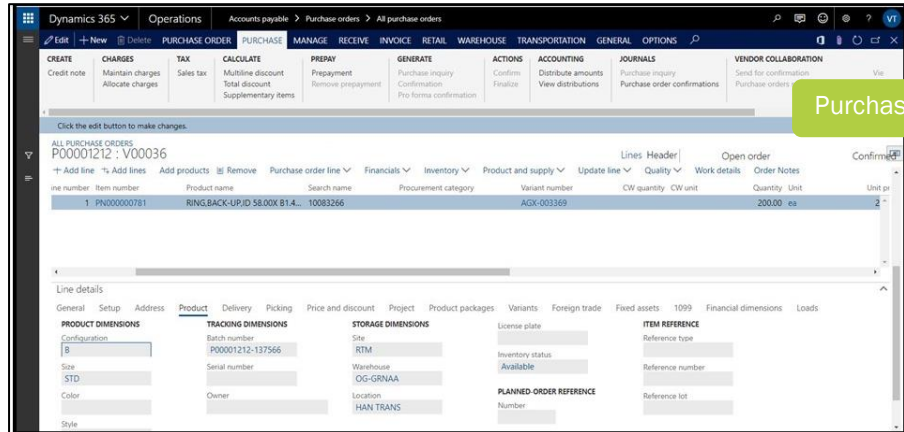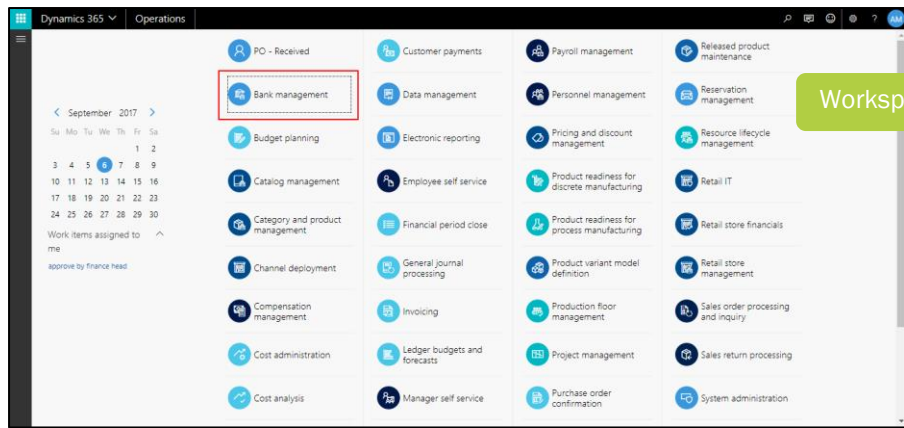
the-box reports. For more complex business intelligence needs, the SCM solution provider leverages Entity Restore to replicate data to an Azure SQL Server Database. This allows its internal BI talent to continue building reports using direct T-SQL queries and stored procedures.

Business Results

Implemented in just **14 weeks**, the Dynamics 365 for Operations solution gives the SCM solution provider a complete picture of their inventory availability, purchase, sales, shipping schedules, and all the other data required to manage their entire supply chain efficiently.

The **global implementation with multiple locations** offers the SCM solution provider a comprehensive view of the available stock, as well as a way to manage backorders and track lost sales. It helps them determine the most logical sequence of picking locations in order to optimize their picking routes and speed up order

fulfillment for their customers. This allows them to deliver outstanding customer service at every phase of the order process.

With payment automation, the SCM solution provider is able to automate critical payment activities and interact electronically with their bank, vendors, and employees, while meeting comprehensive payment standards and management controls.

One of the best features of the solution is that quality management lies at the very heart of it. The SCM solution provider is able to ensure that the quality of their services meet the needs of their customers on an ongoing basis.

Overall, the solution provides the SCM solution provider the flexibility and control to help them optimize their warehouse processes. With this, they are better equipped to increase customer satisfaction and reduce costs.