



Dynamics 365 for Finance and Operations Implementation Helps a Chemicals Supplier Improve Integration Between Warehouses and Boost Business Performance

CASE STUDY

Customer: A leading supplier of single source speciality chemicals

Size: 501-1,000 employees

Location: Sharonville, OH

Industry: Chemicals

Profile: The client delivers specialty cleaning and process solutions for general manufacturing, pulp and paper making, transportation cleaning, and water treatment markets.

Services: Dynamics 365 for Finance and Operations Implementation

Business Need

The chemicals supplier had acquired 7-8 different companies in the last six years and grew from a \$300 million company to \$850 million. However, despite the impressive growth, the client was using a Dynamics AX 2009 system which was no longer supported by Microsoft.

In addition, since the supplier had acquired many companies, each with a different Warehouse Management System, inventory/ order management had become a big challenge. The supplier processed 11,000 orders every month, 70% of which were put on hold due to information residing in different systems across sixteen warehouses. This led to several roadblocks across mismatched inventory, SKU, and customer/credit information.

To overcome these challenges, the chemicals supplier had a 15-member dedicated team to work on these order holds every month, which was an additional investment on the client's finances. Moreover, integration of these newly acquired entities was also a big challenge in the non-supported AX 2009 environment.

The client wanted Synoptek to undertake the Warehouse Modernization Project to replace outdated Warehouse Management System (WMS) and integrate Dynamics 365 for Finance and Operations WMS with the AX 2009 Live System which was used as the Finance system.

Solution and Approach

While the primary objective was to modernize the current ERP platform, the chemicals supplier had resource constraints to take up the ERP overhaul of this nature; the immediate need was to solve the pain of the inventory consolidation across 16 warehouses and overcome the order hold challenge. Several other challenges also had to be overcome with utmost precision and planning.

- As the project progressed, the scope changed due to roadblocks related to existing process; Synoptek had to overcome them by making changes to the Integration approach.
 - Master Data in AX 2009 had a lot of discrepancy which had to be corrected.
 - Limitation to the Standard Data Entities meant that Synoptek had to create Customized Data Entities.
 - The existing WMS mobile app was not user friendly due to which, for some of the transactions, Synoptek had to use a weblink to execute the process.
 - Several business scenarios were based on the item category which led into implementing those business rules into the WMS system
 - As the source of record was AX 2009, multiple rounds of Data Migration had to be done to perform testing on the live transaction in stage environment.
 - Existing business rules specific to order delays had to be considered which led into iterative changes to the overall integration.
 - The presence of several compliances, hazardous attributes, regulations, location dependencies, and unit conversions that impacted the pick and put method.
 - New scenarios discovered during System and Integration Testing required Synoptek to provide continuous support for making those changes.
 - To migrate huge amount of data including item, vendor, and customer with address and other information, Synoptek optimized the batch job in a step by step manner and created multiple jobs to run parallelly to overcome the issue of potential downtime.
- Despite the various challenges, Synoptek helped in successfully implementing and consolidating the warehouse in Dynamics 365 - without bringing in other functionalities like procurement and finance. We understood, early on, that the interaction and commitment between business users and the ERP implementation partner team is very critical for the project. Therefore, we:
- Clearly defined expectations that emphasized the BPLs/ SMEs required in the journey of ERP transformation
 - Facilitated the right levels of engagement across the right operational leadership levels to create clear goals, team bonding and prepare the business for the challenges ahead
 - Ensured involvement of BPLs right from the beginning: from overall design to system testing as well as UAT to avoid gaps and Change Requests at a later stage
 - Constantly enhanced the implementation methodology to cater to new requirements and allotted a dedicated Project Manager to overcome challenges and facilitate better and faster integration of designs and solutions
 - Created a reusable integration log framework to log and track all activities and changes done during integration

Since every inventory transaction has its implications on the finance entries, the team at Synoptek had to build the live integration bridge between Dynamics 365 for Finance and Operations WMS and AX 2009 ERP. The project included the following services:

- Dynamics 365 Integration
 - Customer and Submasters
 - Vendor and Submasters
 - Item and Submasters
 - Sales Return
 - Customer Address
 - Contact Entities
 - Two-way integration of Sales Order, Purchase Order, Production Order, and Transfer Order
- AX 2009 data cleansing
- Moving existing customization specific to the Masters and Transactions to Dynamics 365 for Finance and Operations
- Dynamics Shipping Connector Implementation: Synoptek utilized the already created shopping connector add-on, modified it as per the client requirement, and added a functionality to generate the shipping label
- WMS configuration to build advance pick and implement logic based on the Item Type, Location and Packaging type
- Data Migration – Masters (One time as well as incremental)

Business Results

With Synoptek's guidance and implementation services, the chemicals supplier was able to achieve a Technology Platform Upgrade which enabled it to get rid of the obsolete WMS systems and leverage the benefits of a single, consolidated platform. Since Synoptek helped in enhancing the order fulfilment process, the client was able to improve customer satisfaction and retention. In addition, the client could achieve several business benefits including:



4 Dynamics 365 for Finance and Operations Implementation Helps a Chemicals Supplier Improve Integration Between Warehouses and Boost Business Performance

- Live synchronization of the transaction which means faster inventory reconciliation: from a week, the reconciliation time was brought down to one day
- A completely parameterized integration that allows the client team to bring in additional warehouses in the integration flow by simply ticking on checkboxes to activate the integration for a new warehouse
- The presence of a Warehouse Template which resulted in fast rollout to another warehouse as well as faster integration of new business processes into existing business applications
- Successful cleansing of Masters that led to improved data management
- Freed up the client's 15-member staff that was dealing with order holds, allowing it to save money and place resources in more critical roles
- The implementation of a scalable Dynamics 365 design, so not many changes will have to be done if the client wants to move completely to Dynamics 365 for Finance and Operations

Modernizing the existing business platform will help the client to run and grow business and easily acquire and integrate more entities in the future as it grows.

“Thank you Synoptek for the outstanding assistance we received from your team to go above and beyond in getting us Live.”

- Vice President of Information Technology

About Synoptek

Synoptek is a global systems integrator and managed IT services provider, offering comprehensive IT management and consultancy services to organizations worldwide. The company works in partnership with clients of all sizes – from mid-market to Fortune 100, and for over two decades, its focus has been to provide maximum business value to its clients, by enabling them to grow their businesses, manage risk and compliance, and increase their competitive position. Synoptek is committed to delivering improved business results and unmatched service to every client, every time.

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