



Dynamics 365 Support and Integration Services Help a Bakery Manufacturer Achieve Better Automation

CASE STUDY

Customer: A bakery equipment manufacturing company

Size: 201 – 500 employees

Location: Richmond, VA

Industry: Machinery

Profile: The company offers best-in-class unit equipment and complete system solutions to bakeries around the world, helping them improve operations, products, and bakery success

Services: Dynamics 365 for Finance and Operations Rollout, Support, and Integration

Business Need

The bakery equipment manufacturer operates across three locations – Richmond, Tucker, and Sheerbrooke and thrives to provide the highest level of service: from process improvement and system design through installation, training, and aftermarket support. Whether accelerating a large-scale bakery line with the latest in high-speed technology, integrating new equipment into an existing sub-system, or introducing automation for the first time, bakers depend on the manufacturer for efficiency, reliability, consistency, and profitability.

The client used an older ERP system and wanted to unify their processes across multiple business locations. The first step in doing this was by implementing Dynamics 365 for Finance and Operations Using the services of a third-party partner, the equipment manufacturer implemented Dynamics 365 for Finance and Operations to improve the performance of business processes.

However, from the perspective of go-live, rollouts, training, and post implementation, the client was looking for functional as well as technical expertise from a qualified Managed Services Partner who could provide

- Technical Support
- Functional Support

- Integration Support
- Process Automation Support

The client got in touch with Synoptek to provide these services and improve the performance and functionality of their Dynamics 365 for Finance and Operations solution.

Solution and Approach

To meet the bakery equipment manufacturer's requirements, Synoptek provided a range of services:

Technical Support

The client wanted Synoptek to improve the capabilities of their existing Dynamics 365 for Finance and Operations modules through several customizations and report development enhancements:

- Skid customization
- Job bundling
- Commercial invoice excel utility
- Suggested LPN for production components going to production staging
- Production scheduler
- Report view for items in packing station
- Customized ACH format for RCB and BOA banks
- Shortage screen with Email functionality
- Custom work processor to print labels

Functional Support

Synoptek provided certified Microsoft Dynamics consultants in SCM and Finance to assist the client in go-live, rollouts, training, and post implementation. The functional team was involved in verification and validation of the technical enhancements that were a part of the contract/project.

Integration Support

To enable integration with the client's preferred carrier service, Synoptek carried out UPS WorldShip integration with the existing Dynamics 365 for Finance and Operations solution:

- Installed UPS WorldShip
- Used the XML Auto Import feature to import and process shipments in an XML formatted file
- Selected the required drive and path location for XML input and output files
- Carried out customization that allows users to transfer any change of 'Mode of Delivery' and 'Carrier Name' from the Sales Order Header

Project Automation

Synoptek also built automation between the client's CRM and Dynamics 365 systems - when a sales order is created in CRM, a new project/project structure is automatically triggered in Dynamics 365 for Finance and Operations.

- Created projects from templates using copy project functionality
- Copied product name and serial number from CRM to Dynamics 365
- Created connections between the two solutions to enable data integration

- Analyzed current invoice flow process – including how they are received, how they are processed, and what challenges and bottlenecks the client was facing
- Established a centralized service for invoice management, so invoices from different vendors in different formats get automatically sent to AP in a standardized format
- Implemented a processing engine to automate policies and procedures for validation, payment authorization, as well as reporting and analysis
- Documented standard policies and procedures for processing invoices

AP Automation Support

Since the client got invoices from different vendors in various formats, Synoptek helped automate the Account Payable invoices in Dynamics 365 to reduce manual effort for reconciliation and streamline the error detection process. Synoptek carried out the following activities:



Business Results

With Synoptek's integration and support services, the bakery equipment manufacturer could achieve several business benefits:

- Enhanced dashboard and reporting capabilities
- Improved shipment processing efficiency through seamless UPS WorldShip integration and helped the client to, respond to customers faster, and reduce costly errors
- Streamlined the customer order management process through integration between Dynamics CRM and Dynamics 365 for Finance and Operations
- Enhanced performance and support of overall logistics, warehouse operations, manufacturing processes, and financial processes
- Standardized invoicing process, making it faster, efficient, and error-free by eliminating the need for manual reconciliation efforts and enabled a faster and economical rollout

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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