

Case Study

Dynamics 365 Implementation and Support Optimizes a Versatile Industrial Services Company's Performance



Customer Overview

Customer

A full-service construction company

Profile

The client provides full-service construction services through all phases of the industrial construction process—from site prep through start-up

Industry

Construction

Services

Microsoft Dynamics 365 Implementation and Support

Business Need

The construction services company serves a wealth of industries – from chemical and power, to automotive and refinery – with construction, turnaround, and maintenance services that put safety and quality at the forefront of every project and decision. Dealing with regional and international clients, the client's business was growing fast, and project tracking, management, estimation, and costing were becoming major concerns. To accurately track and properly manage projects and seamlessly expand the business, the client sought to implement an ERP system that would help carry out project tracking, estimation, and costing, and manage financial accounting for various departments and legal entities.

The implementation of Dynamics AX 2012, done by a previous implementation partner, failed to adapt to evolving needs. Soon after the implementation, the client started facing functionality and performance issues in key process areas, such as financial analysis and payroll processing. So, it began to search for a qualified partner who could understand and resolve post-implementation pain areas with the Dynamics AX system as well as deliver enterprise-level support.

Solution and Approach

Synoptek conducted a thorough review of the client's current needs. Based on this understanding, we developed an implementation and support plan and customized the Dynamics AX solution for various internal practices and processes.

Dynamics AX Implementation

Leveraging the Sure Step Methodology in combination with Microsoft Dynamics accelerators, we utilized core functionalities of Dynamics AX including multiple time zones and delivered a range of modules, including:

- Full-fledged financial management for all legal entities, and consolidation of those entities
- Human Resources Module
- Supply Chain Module
- Project accounting and management
- Expense management
- Inventory management
- CRM

In addition, we enabled the configuration of business intelligence (BI), key performance indicators (KPIs), and role centers, and enabled a range of enterprise portal functionalities.

Dynamics 365 Upgrade

As a tech-savvy organization, the client wanted to upgrade their current AX 2012 system to Dynamics 365. In this ongoing activity, Synoptek is taking the customized AX code to the new Dynamics 365 system as a part of the lift and shift activity. Once the system is upgraded, its modular implementation on D365 will also be a part of the new system. On go-live, the client will have the entire system up and running.

During the upgrade initiation, Synoptek has

- Identified some of the ISV modules implemented in AX 2012 which will further be eliminated as those functionalities are now available OOTB as standard.
- Enabled the Procurement and Sourcing function to streamline vendor collaboration.
- Initiated a new process to maintain the Subcontractor Database and leverage the functionality of Vendor Collaboration to get new Subcontractors onboarded and maintain their safety and mandatory certificates through the system.
- Merged the Work Order system into D365, enabled an ISV for Payroll support, and integrated the client's estimation tool (Timberline) with D365.

Dynamics 365 Support

With the motive to maintain business synergy and optimize the system's performance, Synoptek provided a support plan that included both functional and technical (onsite and offshore) support, to enable seamless operations across the enterprise, including:

- Around-the-clock support to resolve day-to-day issues occurring within the D365 system.
- User manuals, test case scenarios, and training to individual users and user groups, as and when required.
- Performance monitoring to resolve issues and bottlenecks in time and uphold user experience.
- Continuous customization of the Dynamics platform based on evolving needs by technical and functional experts.
- Risk management to build a solution for effective response to emergency events.

- Compliance management to improve internal control and increase visibility into compliance-related processes.
- Report generation using Microsoft SQL Server Reporting Services (SSRS), and BI to meet complex business and financial requirements.
- Integration services to integrate the D365 system with third-party apps/ legacy systems.

Business Results

The flexible end-to-end Dynamics 365 solution was designed specifically for the client's unique requirements. Synoptek's highly experienced Microsoft Dynamics 365 support team, with technical and functional skills, made sure that the client's usage of the ERP was maximized to the highest level.

With the use of the Sure Step methodology, the client received value-added quality services, along with a cost-effective approach for their Dynamics 365 implementation. The implemented solution gives critical insight into each of the projects while supporting procurement procedures, project management, financial management, and reporting. With Synoptek's Dynamics implementation and support services, the client can:

- Carry out better project cost control via effective project revenue recognition and identification of variances.
- Standardize processes for easy operation across global locations via intuitive dashboards, including visual status indicators to highlight project cost tracking and variances.
- Overcome all functionality and performance-related issues and ensure an efficient, secure, and optimized Microsoft Dynamics 365 solution and infrastructure.
- Track issues effectively, shorten turn-around time for issue resolution, and enjoy high levels of agility - all while improving financial control and visibility.
- Considerably reduce costs and enable continuous improvement in business operations through efficient use of the Dynamics 365 platform.
- Offer a user-friendly and modern user experience, making life easy for employees to complete day-to-day transactions.
- Easily generate and share RFQs and eliminate the need to send emails to applicable vendors and maintain their responses manually.

About Synoptek

Synoptek delivers accelerated business results through advisory-led, transformative full-life-cycle systems integration and managed services. We partner with organizations worldwide to help them navigate the ever-changing business and technology landscape, build solid foundations for their business, and achieve their business goals.