



Velosio Builds Robust ERP and CRM Solution for Rotex Global LLC

The Challenge

The company had been using a highly-customized system that lacked financial and accounting components, leaving these vital tasks to separate, stand-alone applications.

Solution

In an effort to support all of its business operations with one application, Rotex Global decided on Microsoft Dynamics GP and Microsoft Dynamics CRM.

Results

A fully integrated solution that delivers a lower total cost of ownership, improved inventory control, a consistent, intuitive interface and sales cycle automation.

Integrated International Solution

The company had been using a highly-customized Oracle-based system to support its manufacturing operation, but the system lacked financial and accounting components, leaving these vital tasks to separate, stand-alone applications. In an effort to

Client Overview



INDUSTRY: Dry Material Screening, Equipment and Technology

LOCATION: Cincinnati, OH; Remscheid, Germany; Cheshire, UK; Chiba, Japan; Wavre, Belgium

NUMBER OF LOCATIONS: 5

SYSTEM: Microsoft Dynamics GP; Microsoft Dynamics CRM

Rotex Global, LLC manufactures industrial machinery used to sort and separate dry materials. With applications in the mining, agricultural, fertilizer, energy, and pharmaceutical industries, Rotex Global counts many of the world's largest companies as its customers. The company has been thriving for 165 years, expanding its operations internationally. It is a complex operation that requires a robust and flexible ERP solution.



support all of its business operations with one application, Rotex Global reviewed several ERP solutions, including an expansion of its Oracle application, and ultimately decided on Microsoft Dynamics GP and Microsoft Dynamics CRM.

"We wanted a fully integrated system, and Microsoft Dynamics is one of the best. The Microsoft platform was appealing to us, as was the ease of implementation," recalls Robert Dieckman, CFO and VP of Finance. *"The international capabilities and the inherent flexibility in the product meant we wouldn't have to extensively modify the source code."* A solution based on the Microsoft platform also delivers a lower total cost of ownership, as it is easier and less expensive to maintain, support, update, and enhance.

Experienced Team

Velosio was recommended to the company as a local Microsoft business partner with the resources, experience, and expertise to help drive the large implementation. *"It was a challenging, international implementation and Velosio handled it extremely well,"* says Dieckman. *"Velosio is the right partner for us. They designed and managed the implementation, even travelling with our team to our international offices to ensure the project was a success."*

Velosio suggested a phased approach to the implementation, to lessen the impact of the transition. Initially, the company began utilizing just the financial and reporting modules of Microsoft Dynamics GP, then the accounts payable and receivable were brought on line, with the full manufacturing, distribution, and CRM components rolled out to its U.S. operations in 2010, and its overseas offices in 2011.

Company-Wide Data Access

Previously, with its many disparate systems, it was difficult for Rotex Global to get an overall view of the organization and difficult to share data and collaborate across departments and locations. *"Some of the biggest benefits Microsoft Dynamics GP and CRM deliver are consistency, efficiency, and transparency,"* says Dieckman. *"We all have access to the same information and data does not have to be exported, imported, or reentered."*

As CFO and VP of Finance, Dieckman appreciates the robust financial reporting tools available to him with Microsoft Dynamics GP. With the old system, data from multiple sources was downloaded into Excel spreadsheets to be sorted and consolidated. In Microsoft Dynamics GP, Dieckman quickly can get the data he and the management team need to make better business decisions. *"We can look at our operations in multiple ways,"* he says. *"It is a major improvement."*

Manufacturing and Inventory Control

The company is successfully utilizing the full manufacturing functionality of Microsoft Dynamics GP, and on Velosio's recommendation has added an integrated product configurator solution from Experlogix. Orders are initiated in Microsoft Dynamics CRM, and flow to Microsoft Dynamics GP where a work order is created using the specified parameters. *"Each of our machines is made to order to customer specifications,"* explains Dieckman. *"The software allows us to personalize each order as required. It's highly efficient and accurate."*



Another benefit Rotex Global is realizing is improved inventory control. *"We have full lifecycle tracking of our inventory,"* says Dieckman. *"Because inventory, manufacturing, order entry, purchasing, and financial reporting are all integrated, all departments are getting better information and the result is more informed decision making."*

CRM Improves Data Access

Microsoft Dynamics CRM has been a game changer for the company as well. It provides a consistent, intuitive interface and provides Rotex Global's internal and remote sales force with timely access to customer and product data. *"We did not have a CRM solution before,"* says Dieckman. *"Now it has become indispensable. It makes it easy for our staff to get the information they need, from wherever they are. It's easy to use, and the integration with GP means that we are always working with up-to-date information."*

The use of its CRM solution helps the company automate its sales cycle, facilitating communication with distributors and customers, and enabling management to better monitor leads and sales activities.

A Partner in Success

Dieckman has high praise for Velosio. *"They have been with us all the way, and have become a real partner in the process. Velosio played a big part in planning and structuring both the hardware and software that make up our solution. They are a big part of the reason the project has been so successful."*



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