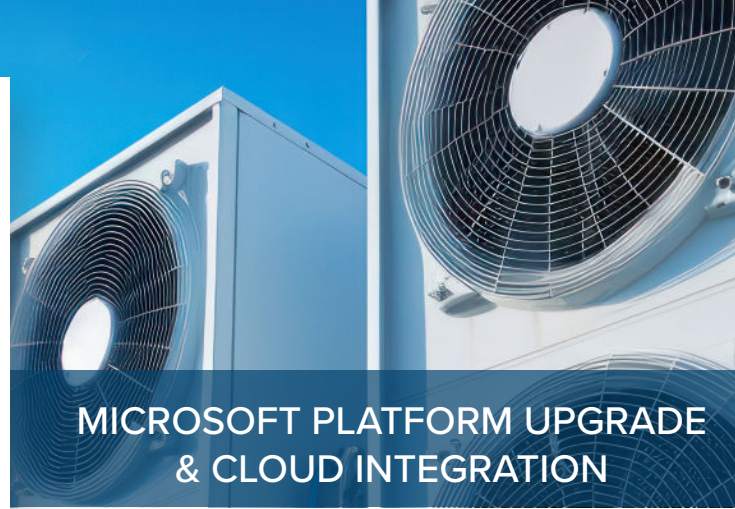




CLIENT SOLUTION CASE STUDY

Havtech Upgrades to Microsoft Dynamics 365 Sales and Integrates with GP ERP and Data Lake for Better Customer Experience



MICROSOFT PLATFORM UPGRADE
& CLOUD INTEGRATION

Background

Established in 1983 and established in Columbia, Maryland, Havtech represents the most innovative HVAC equipment and building automation system for manufacturers



serving both the commercial and industrial markets. This depth combined with expertise in energy efficient HVAC system design and green building methods allows them to offer cost-effective solutions that provide a low environmental impact at the highest return on investment to its customers. Havtech provides every customer with an exceptional experience.

www.havtech.com

On-Premises to Online

After upgrading its Microsoft Dynamics GP Azure-hosted solution to better manage financials for eight different companies, Havtech knew it could benefit from moving its Microsoft Dynamics Sales to the cloud for quoting and selling HVAC equipment and parts. Velosio, a long time Microsoft partner for Havtech, also recommended that Havtech integrate its disparate ERP and CRM data so that GP and CE would have two-way communication. Havtech was utilizing Scribe Insight on-premises for integration and needed to replace it with Tibco Cloud Integration (formerly Scribe online).

OVERVIEW

Software Solutions:

- Dynamics GP
- Dynamics 365 Customer Engagement
- Data Lake
- Power BI
- Microsoft 365

Challenges:

- Server Access and Space Constraints
- Disconnected Systems
- Reporting and Insight Constraints

Benefits:

- Leverage Data for Better Decisions
- Empower Business Innovation and Growth
- Capitalize on Cloud Technology
- Better Customer Experience

Company Overview:

HVAC equipment and building automation system manufacturers serving both the commercial and industrial markets.

Industry: Manufacturing Services

Employees: 240

Headquarters: Columbia, Maryland

Annual Revenue: \$50.7M

The team at Havtech considered Salesforce but wanted to stick with a Microsoft product for CRM. With on-premises CRM, Havtech had a data warehouse which was performing calculations and pulling data points from both GP and CRM. Along with moving the Dynamics Sales solution to the Cloud, Velosio recommended replacing the data warehouse with a data lake so that complex calculations would reside online. A data lake contains data in its original, raw format, while a data warehouse contains structured data that has been cleaned and processed. The data lake gives Havtech the ability to consolidate and correlate data from different sources and systems.

Microsoft Power BI was selected as the presentation layer for the data lake.

After attaching dataflow, Power BI configures and saves a reference so that Havtech can now read and write data. Power BI stores the data in the common data model (CDM) format, which captures metadata in addition to the actual data generated by the dataflow itself. This feature unlocks many powerful capabilities and enables data and the associated metadata in CDM format to now serve extensibility, automation, monitoring, and backup

scenarios. Havtech made this data available and widely accessible in its own environment, enabling them to democratize the insights and data created within the organization. It also unlocks the ability for them to create further solutions with a wide range of complexity.

Integrated System

Now that the data lake is online, the time it took to run reports has been drastically reduced. The Havtech team is also benefiting from integration between multiple GP databases and CE online. Data is now replicated across all eight GP company databases so that accounts are synched when a change is made. As Havtech acquires or creates new companies, they now have a quick onboarding template.

The team is also now using Microsoft Outlook online — Velosio implemented Outlook and trained the team. The Havtech sales team can now create opportunities, quotes, orders, and invoices from within CE, pulling in the latest pricing information from GP. Havtech can now provide a better customer experience with a modernized CRM solution.





Cloud Benefits

Moving an on-premise solution to the cloud presents these benefits to Havtech:

- Improving latency, redundancy, availability, and security
- Reduce cost by eliminating on-premises servers
- Improving business continuity and Disaster Recovery (DR) capabilities
- Increasing agility and competitiveness with integrated system
- Scalability
- Flexibility
- Improved reliability and up-time
- Simplified upgrades for Dynamics 365 Sales
- Increased Security

Future Plans

Next up, Havtech has plans to upgrade to Microsoft Dynamics 365 Business Central, to support growth through acquisition.

The team will also bring its marketing functions into Microsoft Dynamics 365 Customer Engagement.

Discover how Velosio can help your business with Microsoft Dynamics 365 business applications.

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