



CLIENT SOLUTION CASE STUDY

Technology Service Provider Optimizes Parts Management with Microsoft Dynamics 365 Supply Chain Management Solution from Velosio



Background

For its clients, a technology service provider services data center hard drives with new and used parts which are housed in global warehouses. Technicians travel to data centers to swap out and update parts. Getting the parts to the field was a labor intensive, manual process managed by 16 full time employees who would manually sort through inventory and determine which parts were closest to the technician. This manual fulfillment process was not sustainable as clients, based on their contract, must be serviced within one to two days. Sometimes field techs would have to travel to a warehouse location to pick up a part if there was not time for shipping – losing precious time in the field.

In addition to inventory management, the organization needed a way to manage vendor returns, so that if a shipped hard drive is bad, they can send it back. They also wanted to determine if one vendor has more bad drives than others, so they can discontinue partnering with them.

The organization was using a heavily customized legacy tool for inventory management, and accuracy was low, as well as user acceptance. With Microsoft Dynamics 365 Finance in place, they looked to Microsoft partner Velosio to improve inventory management.

OVERVIEW

Software Solutions:

- Dynamics 365 Finance
- Dynamics 365 Supply Chain Management

Challenges:

- Automate and improve inventory management
- Replace highly customized legacy tool
- Improve user experience

Benefits:

- Increased inventory accuracy
- Improved Scalability
- Optimized fulfillment tracking

Solution

Velosio recommended that the technology company add Microsoft Dynamics 365 Supply Chain Management with Advanced Warehouse Management and Intelligent Order Management to centrally manage orders from capture to fulfillment using real-time omnichannel inventory data.

Two-way integration with its field service solution (including 44 different end points) would ensure that the correct technician would be in the correct location with the correct part in time to fulfill contractual obligations. Additional two-way integration to support five additional systems for shipping, planning, item creation, delivery tracking, and 3PL logistics would round out the solution.

Velosio also wrote many Power BI reports to replace Excel-based reports, developing a Power BI report which combines information from all entities at once, surfacing information from Microsoft Dynamics 365 Finance and Supply Chain Management.

Benefits

The technology service provider now has an end-to-end, integrated solution with Microsoft Dynamics 365 Finance, Microsoft 365 Supply Chain Management for improved inventory management and fulfillment. Intelligent Order Management within Dynamics 365 Supply Chain Management solved the question: “from where do I fulfill this item”? Now, an order is created, it’s sent to Intelligent Order Management which determines the closest warehouse from which to fulfill the part and updates the order with the best option. Now the 16 full-time procurement employees can focus on managing exceptions and additional procurement responsibilities. User acceptance is much higher than before. The cloud-based, flexible solution is more scalable than their previous solution, and available anywhere anytime. Inventory accuracy and fulfillment tracking have been optimized.

Future Plans

The organization has plans to use vendor collaboration within Microsoft Dynamics 365 to optimize purchase orders and is planning to further prioritize quality orders based on client contracts. The team would also like to begin tracking serial numbers for the server components, with printed labels that technicians can stick on the parts after testing to say whether they passed or failed inspection.

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