National Vendor Speeds Order Processing and Invoicing with Microsoft Dynamics GP and CRM Connector

Technical Case Study

armanino

RELECTRIC
Power Distribution & Control Solutions

Business Challenge

Relectric Supply Company specializes in the sale of hard-to-find circuit breakers and electrical components, providing new, green and creative ways to source materials. Relectric grew from a small business founded in 2003 to become a national firm listed on the INC. 5000 in less than ten years. Since 2006, Relectric had used Microsoft Office Accounting, but found this entry-level accounting system had limitations including becoming slower and slower as the business grew.   Relectric began the search for a more robust solution that would meet its immediate needs as well as those in the future.

"We had an outside sales organization. The system they were on did not communicate with our accounting system. There was a disconnect there," said Anthony Robinson, Founder and CEO of Relectric Supply. "We realized a middleware solution was absolutely necessary to get data from the CRM system where our sales people live to our accounting system."

As a Microsoft-centric organization, Relectric utilizes Office, SQL Server, and Microsoft IIS to host its websites in-house. The company chose Microsoft Dynamics GP and Microsoft CRM as its enterprise resource planning solution. This allowed them to retain a unified Microsoft systems platform and a familiar user interface for its staff.

Business Benefits

Relectric launched Microsoft Dynamics CRM and Microsoft Dynamics GP on January 1, 2011. Relectric teamed with Armanino to customize the CRM and GP applications to meet their business workflow needs, adding modules to accommodate:

- Automated shipment tracking/reconciliation
- Credit card authorizations
- Website integration and order processing
- Multi-warehouse receiving and order fulfillment systems

Instead of working in multiple systems and becoming bogged down in data redundancy, Relectric users of all job functions now trace account and transaction status from start to finish due to the seamless integration of CRM and GP. While using its previous accounting system, Relectric lacked controls for "cost of goods sold" and was unable to adequately track serial numbers. This led to a significant number of errors in system reporting. Now, Dynamics GP locks down the inventory, tracking serial numbers in and out of the system, and keeps the general ledger accurate.

Relectric has 60,000 customers and 100,000 items in inventory. Prior to the Microsoft Dynamics CRM and GP implementation, it took 30 seconds just for the accounting system to return an inventory onscreen. Now, processing an order end-to-end is immediate and seamless.

"It's all very fast, updating on an almost real-time basis, every 45 seconds. We see things flowing back and forth very efficiently and haven't had any issues with connectivity," said Robinson.

Armanino helped Relectric to bridge the data gap between CRM and Dynamics GP by leveraging the Connector for Dynamics. More than simply keeping the company's accounts and addresses synchronized, orders are now:

1. Placed in CRM
2. Submitted to ERP
3. Fulfilled and invoiced in ERP
4. Returned as CRM Invoices, providing status visibility all along the way

This collaborative process brings the sales process full-circle, increasing scalability, data accuracy, and customer satisfaction. Relectric also uses ISV applications to support its sales efforts, including Avalara for sales tax, Nodus for credit card transactions and Ethotech for commissions. It saves immeasurable time in the processing of orders from Relectric's five sales sites and two distribution facilities nationwide.

"The sales team members don't have to go anywhere other than CRM to get the information they need," said Robinson. "A big benefit from the conversion process is the ability to have almost hands-off invoicing. Prior to this upgrade, an invoicing person individually billed each customer and processed each credit card one by one."

The Microsoft Dynamics GP, CRM and CRM Connector integration has assisted Relectric in achieving greater focus on its key performance indicators and positioning this innovative, sustainable company for greater future growth.

"The CRM Connector has allowed us to boost efficiencies such that we are working on other tools and building out more reports versus spending time managing the transfer of data from one place to the other," concluded Robinson.

Topline Benefits
- Hands-off invoicing
- Increase sales process speed, accuracy and customer satisfaction
- Elimination of data redundancy
- Improved communication between sales, fulfillment and finance teams

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Anthony Robinson
Founder and CEO
Relectric

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For more information about Relectric products and services, call (800) 497-6255 or visit the Web site at: www.relectric.com.

For more information about Armanino products and services, call (925) 790-2600 or visit the Web site at www.amllp.com/microsoft-dynamics.

Microsoft Dynamics

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