Technology Provider Relies on ERP System to Support Enterprise Customers Worldwide

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>
> Ron Wollner, President, Computer Data Source

Customer: Computer Data Source
Customer Website: cds.net
Customer Size: 85 employees
Country or Region: United States
Industry: Professional services—IT services
Partner: MIG & Co.
Partner Website: www.mig.com

Customer Profile
Computer Data Source serves customers around the globe by keeping their data centers and IT operations working smoothly, providing the services and equipment to maintain stringent service levels.

Software and Services
- Microsoft Dynamics
  - Microsoft Dynamics GP
- Microsoft Office
  - Microsoft Excel
- Microsoft Server Product Portfolio
  - Microsoft SQL Server

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Business Needs

During more than 16 years in business, Computer Data Source (CDS) has evolved from a high-tech equipment provider into a company that provides hardware-related and software-related services, provides infrastructures for data centers, and serves as a single resource for a wide variety of computing and networking technologies. Helping customers meet service-level agreements with their clients, CDS delivers mission-critical services and equipment to many large enterprises. CDS has its headquarters in Eatontown, New Jersey; maintains offices in Australia, Canada, and the United Kingdom; and conducts business in 20 countries.

Some years ago, CDS used Intuit QuickBooks software for finance and business management and Tigerpaw to administrate contracts, track inventory, and manage delivery systems. However, CDS quickly outgrew what QuickBooks was capable of. And, because the two systems were not integrated, redundant data entry was standard practice. Employees spent more than 40 hours every month in setting up cost analysis spreadsheets and calculating sales taxes, and sometimes, the company sent invoices late. In a critical part of the operation, where customers contact CDS for assistance with equipment and technical issues, managers lacked full insight into call traffic, issue resolution, and resource utilization. Connecting service calls, equipment inventory transactions, and contract management to service-level agreements was also challenging.

CDS sought a business management solution that would closely connect its activities, serve as a unified system of record for all business information, let managers understand events and direct growth, and enable the best possible customer service.

Solution

Working with Microsoft partner MIG & Co., a specialist in Microsoft Dynamics ERP solutions and effective financial and business management systems, CDS implemented Microsoft Dynamics GP in 2004 and, since then, continues to make refinements in how the solution benefits its operations. The company also performs regular upgrades to remain current with the product's latest version. At CDS, Microsoft Dynamics GP serves close to 40 employees in finance, contracts administration, the warehouse and shipping, inventory management, and business reporting. Company executives review dashboards in the Business Portal for Microsoft Dynamics GP to understand business performance. Customers access other dashboards to see real-time updates

on the resolution of their service issues or the delivery of equipment.

By using the ERP system's intercompany module, CDS facilitates smooth inventory movements and transactions with automatic updates among organizational entities. Sales tax calculations are also automated. With SmartLists in Microsoft Dynamics GP, the company has gained information in many areas, including business reporting, inventory management, billing, and service delivery. CDS also takes advantage of the integration between Microsoft Dynamics GP and Microsoft SQL Server for advanced data analysis and reporting.

CDS relies on the multicountry and multicurrency capabilities of Microsoft Dynamics GP to support its global business. The company's Australian, Canadian, and UK offices are subsidiaries within the solution, and users can easily switch among the offices' databases. Customer support teams in the company's global business locations log all calls and activities in Microsoft Dynamics GP, using a "follow the sun" model, where one employee group is always available for customers. Support engineers provide customers with regular service-level reports based on SmartLists in Microsoft Dynamics GP. Kenny Kline, IT Manager at CDS, says, "Microsoft Dynamics GP is the single system of record for our seamless, global customer service delivery. It's a key element in ensuring that customers receive the equipment and issue resolution they need so that they can do business without interruption." Daron Migirdeyan, CTO at MIG & Co., comments, "In conjunction with the CDS 'think-tank,' Microsoft Dynamics GP provides immediate transparency, making it possible to track valuable information and analyze it instantly for business development and decision making."

By taking advantage of its data in Microsoft Dynamics GP, CDS developed:
- **A profit-and-loss analysis system:** Makes automatic, proportionate allocations of portions of employees' salaries to customer contracts and enables profit-and-loss analysis at contract level.

- **A logistics and inventory resource system:** Tracks inventory movements per contract, supports equipment and cost projections for new contracts, automates inventory allocation and delivery, and facilitates sound inventory planning.
- **Wallboards:** With real-time ERP data projected on the walls of the think-tank where the support team works, wallboards highlight call volumes and resolutions, escalated calls, issues per product, issue histories and trends, and resource utilization. Information on the wallboards helps CDS plan support resources.

CDS will build on the current business infrastructure. "We will continue to be creative with Microsoft Dynamics GP," Kline says. "For example, we will give customers more self-service capabilities through the portals."

Benefits

At CDS, the strength of Microsoft Dynamics GP in making information available and enabling efficiencies is a key element in the company's success. Ron Wollner, President of CDS, comments, "Microsoft Dynamics GP has played a critical role in our successful growth. With this solution, we can do business effectively with enterprises by offering resources and service levels that one would expect from a company much larger than ours."

Produce Large Savings and Fast Return-on-Investment
Through automation, elimination of duplicate data entry, improved inventory planning with substantial cuts in inventory on hand, and a variety of process efficiencies, CDS generated substantial savings. Donna Driscoll, Director of Finance at CDS, states, "With Microsoft Dynamics GP, we were able to save $800,000 in the first year after the implementation and more than $5 million in the cost of service delivery through five years. We recouped our implementation costs in less than one year."

Transform Operations for Best Effectiveness
Over the years of working with Microsoft Dynamics GP, CDS has found many ways to use the solution to enhance business processes. For example, explains Driscoll, "Inventory management in Microsoft Dynamics GP, with automatic transfers prompted by engineers' parts requests or low stock levels, is extremely efficient and economical. Also, finance management is consistent across all of our operations, with timely invoicing for all customers."

Quadruple the Business, Keeping Overhead the Same
In its international growth, CDS has taken advantage of the robust, flexible business solution. By using the multicurrency and multicountry modules in Microsoft Dynamics GP, along with automatic sales tax calculations and other automations, the company achieves growth while keeping overhead small. "We quadrupled our business without adding people to the finance and IT departments," says Wollner. "Much of the credit for that goes to our use of Microsoft Dynamics GP."
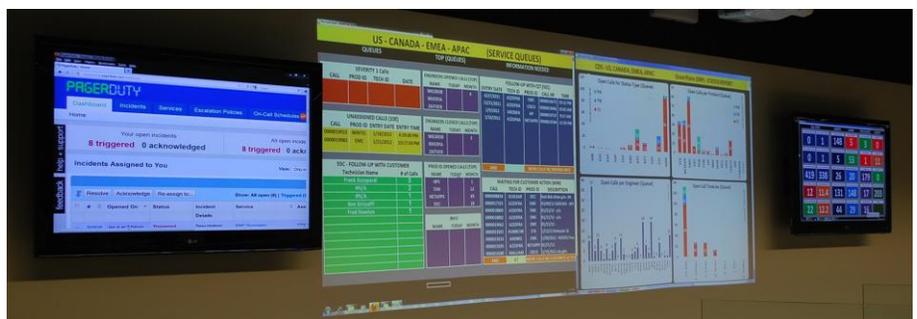
Data projections from Microsoft Dynamics GP in the CDS think-tank.

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