



CASE STUDY

Unified Alloys Prepares for the Future with Custom Integrated Dynamics 365 Business Central Online Platform



KEY HIGHLIGHTS:

\$200,000
Saved Annually

1000S
of Hours Saved



INDUSTRY:

Stainless and Alloy Piping

THE CLIENT:

Unified Alloys

Unified Alloys is a privately owned Canadian company that stocks and represents stainless steel and alloy piping products across a broad range of applications. Founded in 1976, Unified Alloys serves customers across a wide variety of industries who require stainless steel and corrosion resistant process piping products. This includes oil & gas, petrochemical, pulp & paper, mining, power generation, food production, and water industries, among others.

Over 45 Years in Business

5 Service Centers Across Canada

The Problem

Unified Alloys identified they needed more flexibility and interoperability than what their ancient, AS/400 based ERP (Enterprise Resource Planning) system provided. That set Unified Alloys on a search for a new ERP system and an **experienced technology partner** that could assist with transitioning the organization from legacy to new Cloud ERP, Microsoft Dynamics 365 Business Central.

The initial Business Central deployment, handled by a local technology partner, was a disappointment. The technologists were inexperienced with ERP legacy to cloud migrations and their shallow depth of knowledge in Microsoft Dynamics 365 Business Central led to very unsatisfying results. The team at Unified Alloys grew frustrated with the lack of expertise, and inability to answer questions.

Andrew Holland, Unified Alloys' IT Manager, found that he was left picking up the slack, and he even ended up coding an extension to be loaded into the Dynamics 365 Business Central environment himself. With their new Microsoft Dynamics 365 Business Central environment an amalgamation of the original partner's code base and their own custom code base, Unified Alloys recognized the need to bring in a more experienced, long-term Microsoft Dynamics Partner to help stabilize the platform, as well as to help the team continue to improve and shape Dynamics 365 Business Central to best meet their growing needs.



The Solution

A PARTNER THAT UNDERSTANDS YOUR NEEDS

Holland reached out to Microsoft to find a new Microsoft Partner that could better meet Unified Alloys' needs. After conducting interviews with several Microsoft Dynamics Partners, EFOQUS stood miles ahead of the competitors because of the team's deep expertise with the Microsoft Dynamics 365 Business Central platform, as well as their overall business-first approach to technology implementations. Holland was already familiar with EFOQUS' Managing Partner, Erik Hougaard, having watched many of Hougaard's YouTube videos when trying to get answers to Dynamics 365 Business Central questions that arose as he was trying to make Unified Alloys' initial deployment work. During Holland's interview with EFOQUS, Hougaard was able to answer the tough questions that were outstanding for Unified Alloys about the Dynamics 365 Business Central platform. This sealed the deal, making EFOQUS Unified Alloys' next technology partner.

“

What I appreciated most about talking to EFOQUS was we were talking directly to the IT experts we would be working with. No layers of salespeople or account managers to get through or to deflect our critical technology questions,” shares Andrew Holland, IT Manager at Unified Alloys. “At that point, I knew EFOQUS was the right partner for us.”

EFOQUS' initial priority was to stabilize Unified Alloys' Business Central platform, starting with resolving the issues that were of the highest business importance or presented the highest risk. EFOQUS worked directly with the managers of each area to identify, prioritize, and resolve any problems or defects with the system in a series of two-week sprints.

BUILDING A LONG-TERM PARTNERSHIP

After the resolution of the original Dynamics 365 Business Central issues Unified Alloys experienced, Holland could handle the day-to-day management of the system himself. Even so, Unified Alloys found it advantageous to retain EFOQUS so that he can access the teams' guidance and advice as he continues to work on the platform.

As the partnership progresses, Holland has handed over more of the Dynamics 365 Business Central modification work to EFOQUS as well, seeing their depth of knowledge as a great advantage in how quickly they can modify, resolve, and enhance parts of the system.



At Unified Alloys, IT is about solving problems. When we have an issue, EFOQUS works with us to develop a solution, and get it done quickly.” explains Holland.

EFOQUS and Unified Alloys now have an ongoing partnership that allows EFOQUS to gain a deep understanding of Unified Alloys’ challenges and needs as the business grows and evolves. This means EFOQUS can continue to help by integrating different systems and apps into Unified Alloys’ solution as needed. The Dynamics 365 Business Central cloud platform is so customizable, with many different apps and extensions available, the possibilities for further enhancements are endless.

Here are some of the ways EFOQUS has improved Unified Alloys’ Dynamics 365 Business Central implementation with apps, third-party integrations, and custom code.

BETTER KPI TRACKING

After stabilizing Unified Alloys’ deployment of Dynamics 365 Business Central, EFOQUS continued to work with Unified Alloys to develop a framework for measuring and monitoring their KPIs. EFOQUS integrated Microsoft Power BI with Dynamics 365 Business Central, so Unified Alloys can create meaningful dashboards to track and monitor important KPIs, at a glance. Today, Unified Alloys now relies on seven different KPI dashboards, one for each division and one management dashboard that displays the performance of each company.

OPTIMIZED PROCUREMENT STRATEGY

Unified Alloys has also been able to completely change the way they handle procurement. Previously, because they didn’t have the ability to track metrics around inventory, the company worked on a calendar-based procurement system. For example, they would order a set amount of a specific product every eight weeks.

With their new system, Unified Alloys was able to design a procurement dashboard that enables them to optimize their procurement strategy. Now they have a dashboard built in Microsoft Power BI with Dynamics 365 Business Central data integration that provides a detailed breakdown for every product of when and how much to order. This information is based on when they’ll run out of stock, how many are on purchase order, how many customers buy that product, how long it takes to receive the product, the cost and gross profit associated with that product, and even the space that product will take up in their warehouses. This not only allows Unified Alloys to make sure they have the right amount of product on hand to fill orders, but it also gives them detailed information on the profitability of their inventory as well.



The Procurement Dashboard allows us to prioritize ordering with deep, real-time inventory information. For example, if we buy these top items for x amount of money, that will generate y amount of profit, over z amount of time,” Holland details. “This now stops us from ordering inventory that sits on our shelves for years. Ultimately, adding up to much better inventory management, inventory control and cost-savings.”



AUTOMATING INVOICE PROCESSING

To save time and get more precise with invoicing, EFOQUS integrated third-party app, Continia, into Unified Alloys' solution. Continia scans all incoming invoices with optical character recognition (OCR), finds the PO number on the invoice, and finds that same PO number in system. If everything matches and it's all correct, the system automatically pays the invoice. Previously, this was all done manually, on paper. Now, about 90% of invoices are paid without ever seeing human hands. The Continia integration saves Unified Alloys the equivalent of four full-time employees worth of invoice processing time each month, representing savings of up to \$200,000 annually.

ENHANCED REPORTING CAPABILITIES

Unified Alloys is technically five distinct companies, so there is a lot of reporting to be done. EFOQUS integrated their own [Cloud Replicator app](#) to serve as the back end of Power BI, enabling more advanced reporting. This serves two purposes. Cloud Replicator allows Unified Alloys to isolate the process of reporting to minimize the impact of running the reports on their production system. Previously, reporting was a major drain on the system, resulting in performance issues. Cloud Replicator also allows them to aggregate report data from all five companies into one data set that includes cross company data, for more holistic, cohesive information.

GRANULAR SECURITY CONTROLS

For organizations used to an on-premises ERP, moving to the cloud can seem risky. Many worry that their data will be vulnerable to cyberattack. To give Unified Alloys tighter, more granular control of security in Dynamics 365 Business Central, EFOQUS integrated its own **Advanced Cloud Security app**. The Advanced Cloud Security app helps Unified Alloys control who can see and access what in Dynamics 365 Business Central.

This is critically important when you need to provide access to certain information based on job role. For example, in Microsoft Dynamics 365 Business Central out-of-the-box, you can set a user to be able to see all vendors or not see any vendors, but there are no options to see a subset of vendors. EFOQUS' Advanced Cloud Security app allows Unified Alloys to control which specific vendors are visible to which users.

MTR INTEGRATION

Using their own **SharePoint Connector app** as well as custom code, EFOQUS is working with Unified Alloys on MTR integration for their warehouses. In this industry, products must come with a mill test report (MTR) that provides traceability and assurance of quality to the steel's end-user. When a Unified Alloys warehouse receives a steel product, they need to log the MTR, and then when that steel is sold the MTR needs to go with it. This was a time-consuming manual process for the warehouse staff.

With the new MTR integration, instead of manually entering the purchase orders and MTR information into a stand-alone system, EFOQUS is creating a system to handle this process within Business Central, with all the documentation living in SharePoint. The warehouse workers simply need to scan a code with their handheld scanners and the system will automatically link the product with the correct MTR, and through the customer service portal these same documents can be passed on to the customer seamlessly. This will save thousands of hours every year, as well as greatly reducing the potential for human error in this vital process.



The Results

Between re-implementing Business Central and the ongoing integrations and enhancements made to the platform, EFOQUS has enabled major improvements in every area of Unified Alloys' operations, from procurement to reporting. Thanks to EFOQUS' years of experience with Business Central and expertise as a **system integrator** and app developer, the team has been able to solve any problem that Unified Alloys presents them with. EFOQUS' commitment to building strong relationships means they've developed a deep understanding of Unified Alloy's unique needs and are able to recommend further upgrades and improvements to the system as well.

Now, Unified Alloys can get a clear picture of what's happening in their business through better KPI tracking and enhanced reporting; save thousands of hours and hundreds of thousands of dollars through improved and automated procurement functionality, warehousing processes, and invoicing; and take advantage of the benefits of a cloud ERP whilst still retaining granular control of their data. Holland explains the critical nature of these benefits to Unified Alloys, saying,



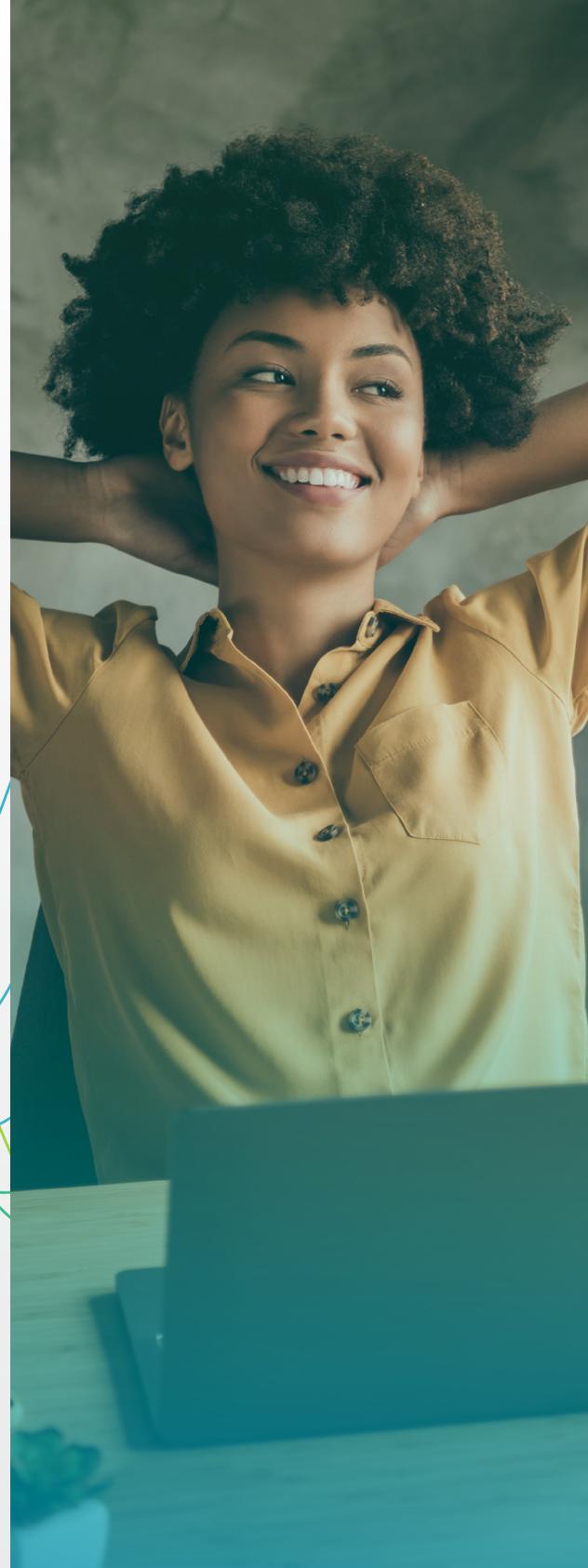
To stay competitive in this economy, companies have to sell more or cost less. EFOQUS and Dynamics 365 Business Central are helping us do both of those."

The resulting ERP platform, based on Microsoft Dynamics 365 modified with apps and custom code, brings Unified Alloys' business out of the past and into the present, while at the same time positioning it for growth and success in the future.

About EFOQUS

The trusted Microsoft Dynamics 365 Business Central Apps & Solutions Partner, EFOQUS eliminates the hassle SMBs and enterprise organizations face with custom ERP extensions while increasing the agility, capability, and scalability of essential systems. EFOQUS takes the time to understand your unique business in order to deliver pragmatic applications and business solutions that enable a 'deep exhale' while helping you achieve more.

Specialists in the development of Microsoft Dynamics 365 Business Central Applications, EFOQUS truly empowers you to take full advantage of your technology, while helping you extend the life and increase the value of your investment in Dynamics 365 Business Central ERP. Take that 'deep exhale' -- get in touch today to achieve more at info@efoqus.ca.



EFOQUS

**See How You Can Exhale More
Deeply by Working with EFOQUS**

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