

Case Study: Dynamics CRM 2011 Customization and Data Migration

Company: Carbon Provider

Client Profile:

Company's primary focus is to provide carbon for a variety of environmental purposes with particular emphasis on air emissions.

Business Objectives:

Current Objectives for Order, Shipping, and invoicing processes

- Reduce time spent by team members to execute processes
- Increase compliance for internal and external policies
- Increase personal accountability.

Future Objectives

- Enable development of management information systems like dashboards and reports
- Enable document management and collaboration by linking to SharePoint document Repositories
- Enable integrated sales management for Company
- Enable integrated customer service

Current Key Processes:

Order Entry

➤ **Process**

- Order Entry breaks the customer order down in to shipment quantities, assigns a Pick up Number for each and updates the Shipment Pickup Number List spreadsheet with Pickup Number, Customer, Pickup Date, Delivery Date, and PO/Release Number.
- Order Entry sends an email to scheduling, outside logistics, and others with details by Pick Up Number
- Pickup Number, Pickup Date, Deliver Date, Plant-Unit Number, Lbs (standard per truckload or railcar), Product (one of two products).
- Order Entry enters each Pick up Number in to GP as an order. The order number generated by GP corresponds to the Pickup Number.

➤ **Notes**

- Customer can email, fax, or call in order.
- Most customers order monthly.
- Orders are generally received 4 to 1 weeks in advance of customer requested ship date.
- Orders can be changed for any attribute. This does not happen often but must be accounted for.
- Customer Orders are scheduled, entered, and tracked by Pickup Number.
- Each customer order is split up in to a truck or railcar shippable quantity and entered as an order and invoice in GP this way. Customers are OK with this. Continue this practice.

Order Scheduling

➤ **Process**

- Shipping Logistics receives email order notification.
- Shipping Logistics schedules each pick up Number with the logistics company (Custom Commodities).
- Shipping Logistics adds each Pickup Number to the ACS Pickup Shipment Number List spreadsheet. This is her way to track the scheduling details. She does not know on this spreadsheet what product or quantity or Truck/Bin number however.
 - ✓ Pick Up Number (GP Order Number), Customer, Pickup Date, Delivery Date

➤ **Notes**

- Scheduled pick up is calculated from customer requested delivery date minus days in transit for that customer.

Order Shipment

➤ **Process**

- Operations Management uses the GP shipping report to create and send an Email each day with operating instructions containing the trailer numbers, silos, and quantities.

Bin Transfer Tracking

➤ Process

- Inventory Control enters Trailer Loading and Transfer Log in to GP as Bin Transfers for Red River.
- The same information gets entered on to Product Tracker spreadsheet.
- The same information gets entered on the Customer Spreadsheet.

➤ Notes

The Product Tracker spreadsheet is necessary because:

- It tracks sales by pounds as a double check that GP posted correctly
- It tracks Crowfoot inventory which is not currently tracked in GP.
- It tracks Red River bin transfers because there is no audit trail in GP for bin transfers.
- The product tracker and Customer spreadsheets will go away by CRM go live.

Shipping Document Preparation

• Bill Of Lading

- Shipping Logistics Prints the GP packing slip report for the order on to the 4 part preprinted colored Bill Of Lading forms.
- Shipping Logistics re-print each of the 4 parts of the Bill Of Lading using a Word template for each customer that contains additional information and instructions.

Invoicing

➤ Process

Transfers to Order/Pickup Number to Invoice in GP.

- Change the Site ID if necessary
- Add the seal numbers to the notes.
- Change the product on each line item to the product actually shipped.
- Enter the trailer/railcar number in the Bin field.
- Update the Date Shipped field if it has changed.

- Create a comment with the lot number and receiving hours from the Customer Master spreadsheet.

Print invoice.

- If the invoice contains one line item, then it is printed directly from GP.
- If the invoice contains two line items (due to shipping two lots), then they create a different invoice that only shows one line item. (How?).

Update Revenue Spreadsheet

- Run a smart list in GP and copy the invoiced line items.
- Paste the line items to the Revenue Spreadsheet
- This spreadsheet is used to double check GP posting properly.