



case study

Technology company gets IT right with Microsoft Dynamics NAV

"We knew we needed a new system and NAV looked to have all the function we wanted. The initial installation was a good start, but turned out to be disappointing in terms of the benefits it delivered.

Once we started working with Metaphorix, things got a lot better. We are now very happy with the way the system works for us and the support we get from our Microsoft partner."

Terry Kintas
Office Manager
Form IT

Form IT aims to give its customers the very best results and the maximum return on investment on their IT spend. Their philosophy is based around providing the correct solution for any given requirement. To ensure they do this, they remain vendor-independent.

To support their business processes, they needed a solution that offered the same flexibility to them that they offer to their customers – they chose Dynamics NAV.

The Company

Form IT was set up by the current MD, Hugh Byrne, working out of his own home. When the business outgrew his front room, Hugh took a major step up and transferred the business to his parents' house!

Today, Hugh's vision is the driving force behind everything the staff try to do. Terry Kintas, the current Office Manager of Form IT, believes that this ethos is what helps to make the company successful.

Terry is well qualified to keep alive the original ideals laid down by Hugh as she joined the company in the very early days and is one of the longest-serving employees.

Form IT has been successful because they realised at the outset that they had to make sure clients got the right solution, not just the solution Form IT chose to partner with.

This means that a key component of their approach to customers is to remain independent of major vendors.

Whether clients need up-to-the-minute, business-wide IT solutions or simply require a more reliable, flexible way to procure IT services, products and consumables – Form IT can help.

Form IT provides server consolidation and virtualisation, disaster recovery, back up strategies, storage, maintenance, desktop refresh deployments and consolidation of printing solutions.

Form IT's technical services division is made up of a number of highly qualified and experienced consultants.

This team has helped the company to achieve a plethora of profession accreditations including Microsoft Gold Certified Partner, VMware VIP & VAC Contract Partner, Citrix Silver Access Solution Advisor, Cisco Silver Partner, Symantec Partner and Checkpoint Bronze Partner.

All these skill sets allow the company to offer the very best, vendor-impartial solutions to their customers' needs.

The Challenge

Prior to implementing NAV, Form IT used a Burroughs system with a single accounts user on it and hardware so massive it took up two desks. The system was old and, obviously, not Windows-based.

On the Burroughs computer, sales orders were handwritten by employees and then entered into the system manually.

CLIENT PROFILE — Form IT



Form IT offers a vendor-independent service to all its clients, ensuring that customers always get the right IT product or service for their needs. Offering a wide range of technical services using their own highly skilled team, Form IT has a well-deserved reputation for quality installations.

Solution Microsoft's Dynamics NAV

Benefits

- More profitable sales order processing
- Better handling of carriage charges
- Improved business processes
- Improved warehousing procedures

This meant that there was duplication of entry – making life harder for users and raising the possibility of errors being introduced.

On the purchasing side, the buyers were given a paper copy of the handwritten sales order to fulfil. This was then re-entered into the system as a purchase order – meaning even more duplication of effort.

In addition, the stock position was held on lists of A4 paper. This meant that the live stock situation was not available on the system and stock allocation to sales orders was a manual process, not integrated with sales order entry.

The result of all this was much longer processes than were needed to get the job done and mistakes appearing in the data from time to time.

A new system was needed to cut down the workload and help to streamline the business processes in use.

The Solution

To make sure they got the function they needed, Form IT built a wish list of requirements.

They then started thinking about the systems they should include in their evaluation process.

A company they worked with were moving to NAV at exactly the same time as Form IT were looking to change their system.

Form IT were confident that their colleagues in the other company knew what they were doing and so they added NAV to their list.

At the end of the evaluation process, It was NAV that came out tops. When they first decided to install Microsoft's flagship software solution, it was still known as Navision.

To implement it for them, Form IT chose a Microsoft vendor based in Cambridge.

The Cambridge-based Microsoft Gold partner helped Form IT get Version 1.1 of Navision installed and running their business.

It took three months to implement the system in a standard format with one customisation – the replication of their paper sales order in NAV.

Although the company now recognise this was probably not the right way to go about using a new system, and that perhaps they should have used the standard sales form in NAV, it was the only way they knew how to create an order.

This meant that the system they ended up with wasn't really offering them the efficiency improvements they had hoped to see. In addition, the original partner proved poor at supporting the NAV installation and they lacked resources. They also promised a free upgrade to Version 2 of NAV, which never materialised.

Dissatisfied with the company from Cambridge, Form IT looked for help getting the system running in the best way possible for their business and for this they turned to another Microsoft vendor.

The transfer of their support contract was prompted by a recommendation from an existing user of NAV who were working with another Microsoft Gold Partner.

This second NAV user gave Form IT the name of the company that had helped implement their system, and that they knew could support Form IT a lot better – Metaphorix.

Metaphorix met with Terry Kintas at Form IT on a number of occasions to discuss ways to help improve the solution. She felt that Metaphorix really understood their business, that they listened and took notice when they described their unique work processes.

Metaphorix took Terry's issues seriously and set about helping Form IT to get the most out of their NAV installation starting with an upgrade to the then latest version of NAV, Version 2.6.

The Benefits

The move to NAV was very important to Form IT as it brought them onto a fully integrated solution that supported every part of their business. The switch to using Metaphorix as their support partner added more expertise and helped them to achieve a system that was configured to suit the way their business actually worked.

A number of small enhancements to the function that NAV originally provided have come out of the work done with Metaphorix.

The move to Version 2.6 went smoothly and the added function the new version offered them was a boost.

In addition, adding carriage to sales orders was a big help – something that came out of a reference site visit to Simms International, another Metaphorix user.

Form IT use their own delivery lorry as well as three third party couriers. The ability to automatically calculate carriage on a sales order, and make it part of the profit on an order, saved the company a lot of money.

Another small change, adding locations in the warehouse for the stock, saved a lot of time putting stock deliveries away.

Overall, the relationship between Form IT and Metaphorix has been a beneficial one for both companies.

For more information about our products and services, please call: **01675 432400**, email us at: sales@metaphorix.co.uk or visit our website: www.metaphorix.co.uk