CASE STUDY

Integrated Supply Chain solution on SharePoint Technologies

Client Profile

This client is a New Jersey based leading small-business supply chain integrator serving the U.S. Department of Defense and other industries.

Situation

The client used a multitude of custom and off-the-shelf products to run daily operations of the organization. These disconnected systems included QuickBooks for finance, a packaged solution to manage solicitations, RFQs and quotes to the federal government a home grown custom search and matching application. The lack of integration between these systems and the manual processing needed greatly impeded the client's ability increase their business. Client was able to process only 200-300 opportunities a day. Lack of ability to analyze past performance of different vendors and suppliers led to costly mistakes that could have been avoided.

Project Objectives

Working with the client, Trigent established the objective as a unified system that utilizes SharePoint and Microsoft business applications that eases the operation and allows rapid growth and provides a competitive advantage for the client.

❑ Automate the entire business process and operations
❑ Unified system that integrates with CRM and ERP with focus to reduce manual work
❑ EDI integration and data exchange for opportunities, solicitations, contract awards, etc.
❑ SharePoint based portal to view solicitations and opportunities from multiple sources
❑ Automatic assignment of opportunities and contracts to procurement specialist and contract administrators based on pre-configured rules
❑ Search feature to identify vendors for any item through different sources like NAV, LogiQuest and ThomasNet
❑ Automate and integrate FAX and Email services to reduce paper based transactions and communications
❑ Automate the bid process with multiple customers/buyers for the solicitations/opportunities based on past procurement history

Overview

Client Profile
Small-business supply chain integrator that serves the defense market and other industries.

Project Objectives
✓ Automate the Client's business processes
✓ Integrate ERP and CRM applications to SharePoint to improve collaboration and facilitate seamless workflows

Technology Stack
✓ MOSS (SharePoint 2007)
✓ Microsoft Dynamics NAV 2009
✓ Microsoft Dynamics CRM 5.0
✓ Microsoft .NET 3.5 platform
✓ MS SQL Server 2008
✓ IIS7, Windows Server 2008
✓ Medium farm topology Deployment with WFE on NLB and SQL cluster

Solution Provided

Trigent built a system that provided:

- ❑ An integrated enterprise system that automates the business processes starting from opportunity, RFQ to vendors, RFQ response, bid with customer contracts and shipment with minimal manual processing
- ❑ Unified solution which integrates to ERP, CRM and SharePoint using BCS and Web Services
- ❑ EDI engine that collect relevant Solicitations/Opportunities from multiple sources like DIBBS and FedBizOps and display them on an integrated SharePoint portal (with historical data from CRM and Navision)
  - ⇨ Automatic assignment of solicitations to procurement specialists based on pre-configured rules
  - ⇨ Search and display vendors for any item from different sources like ERP system and external systems like LogiQuest and ThomasNet
- ❑ SharePoint based vendor portal allows vendors to view/respond to purchase quotes, purchase orders and delivery orders and collaborate with client
- ❑ Automatically bid for certain opportunities in bulk to the respective customers/buyers
- ❑ EDI engine automates many operations including
  - ⇨ Create and send purchase quotes to vendors based on rules and procurement history
  - ⇨ Sends purchase quotes automatically to vendors through integrated email and FAX systems
  - ⇨ Create purchase orders for the contracts that are won and make them available in vendor portals

Benefits
- ✓ Replaces numerous disconnected systems that were used previously
- ✓ Number of opportunities processed went from few hundred to over 5,000
- ✓ Vendor portal improved collaboration and reduced overall response and turnaround time

Client Benefits

The new integrated system significant benefited the company, their partners, vendors and customers. The system enabled the client to process over 5,000 opportunities a day compared to few hundred, previously.

- ❑ Business Intelligence -KPIs and other business metrics are presented via SharePoint dash boards
- ❑ Improved search using SharePoint and Navision technologies
- ❑ Unparalleled collaboration with customers and vendors through integrated SharePoint and CRM systems
- ❑ Enhanced workflow automation using the right combination of SharePoint and CRM workflows
- ❑ Seamless Integration of ERP and CRM systems with SharePoint, providing an integrated view of data
- ❑ The EDI (Electronic Data Interchange) engine pulls Opportunities from different sources automatically and sends RFQs (both Fax and Email)

- Vendor response turn-around time reduced dramatically, due to the integration of proprietary EDI engine, automated fax and email services
- The intelligence built into the bidding module automatically gathers the necessary information of the opportunities that are being bid to the customers/buyers
- Bid upload tool with the ability to validate and upload bids for all the processed opportunities automatically to DIBBS site
- Vendors can view/respond to RFQ's and track the purchase orders, collaborate with customers through secured vendor portal

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