

# Solution Systems, Inc.

## Business Central for Job Shops



### Customer:

CNC Machining Business  
Illinois

### Needs Expressed:

- Connected Systems
- Estimating and Quoting
- Reporting



### Benefits Realized:

- Increased Productivity
- Reduced Costs
- Increased Procurement Efficiencies

### Learn More

 [www.solsyst.com](http://www.solsyst.com)

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## Case Study: Job Shop Software for Business Central

A CNC Machining business in operation since 1970 with 45 employees that has machined parts for the industries of Wind and Solar, Aerospace, Automotive, Food, Healthcare, Art, Education, Hotels, Government, Financial, and Manufacturing was looking to replace their outdated and disconnected business software with a full functioning ERP software tailored to meet the demands of a busy job shop.

### Customer Story

Founded in 1970 when two brothers started a small family owned and operated welding shop on their property in Mchenry, IL. Now over 45 years later this small family owned and operated welding shop has grown into a leader within the metal fabrication industry.

### Background

Over the years business has been mostly steady within the metal fabrication industry with the exception of a few years. However, business could have been a lot better had this CNC shop had more up to date business software offering such features as:

- Connected Systems
- Estimating and Quoting
- Reporting

### Situation [or Problem]

Why change something that appears to be working? During the 70s and 80s this CNC machine shop relied heavily on pen and paper. Then in the 90s they discovered digital spreadsheets and never looked back, or forward for that matter until Microsoft Dynamics 365 Business Central was released. Spreadsheets, specifically Microsoft Excel, were great for tracking things but required manual entry from the pen and paper still being used for things such as Estimating a job. The customer wanted to revamp its system to where everything was done in an ERP software that was accessible by anyone at any time.

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When a task such as Estimating and Quoting a job needed to be performed there was a simple form that was created 20 years prior. This form was so outdated that the floppy disc it was originally saved on could not be found so copies of the form were made from copies of the form. The customer wanted digital templates and worksheets to move away from outdated material still being used for Estimating and Quoting.

As the company grew report tracking became an issue. Relying heavily on Excel worked to a point but was very time consuming and mistake filled. For example, Bill of Material Shortage Reports had become widely inaccurate, which led to time being wasted correcting and which ultimately led to employee costs being higher. Accurate reports were a big requirement that had to be included within a new Job Shop software.

### Solution

The answer to this organization's issues was Microsoft Dynamics 365 Business Central integrated with Microsoft Power BI, and Microsoft Office 365. This integrated software combination allows organizations such as this CNC shop to grow beyond their limits by connecting their people and processes like never before. From day one, ordering, reporting, selling, quoting, invoicing, and manufacturing were easier and faster.

Microsoft Dynamics 365 Business Central is a scalable ERP software that grows as the company grows. Through its ability to extend basic functionality through apps and extensions each issue this organization was experiencing was alleviated. This information can be accessed from anywhere.

Microsoft Power BI is a reporting solution that transforms data into rich visuals for you to collect and organize to share insights across the organization. This information can be accessed from anywhere.

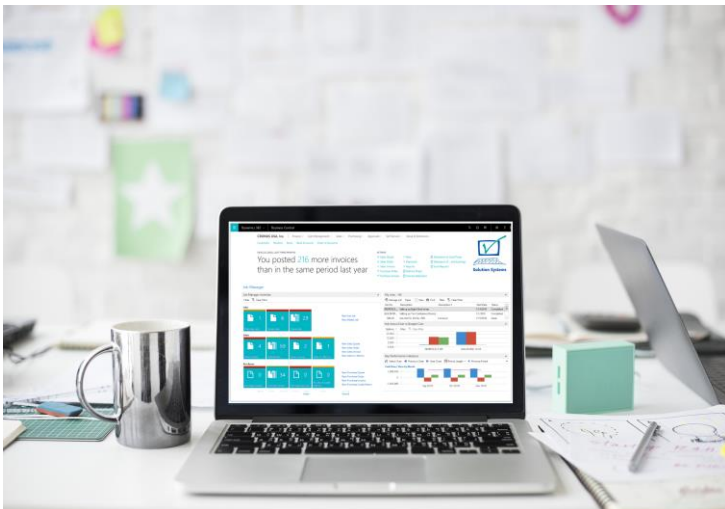
Microsoft Office 365 is a cloud-based solution that offers such apps as Outlook, Word, Excel, One Note and PowerPoint. Office 365 also integrates directly with Business Central through the Outlook, Word, and Excel Apps. This information can be accessed from anywhere.

## Case Study: Job Shop Software for Business Central

### Implementation

Implementation took roughly 18 weeks and required a single project manager and the help of Solution Systems' Support Team. "Importing of the organization's data was very simple because of Business Central's Excel integration capabilities," said Michael Intravartolo at Solution Systems.

During the 18-week implementation period training was provided to the organization's employees so immediately after the software went live employees were prepared and using the software as intended.



### Solution in Action

Microsoft Dynamics 365 Business Central provided many new functioning features for this organization and some of those main features are:

#### Statistics Availability

With Business Central viewing statistics are simple. When clicking on a Job from the Job List you can see a Job Summary, Job Changes, Job Purchase Order Change and Notes in the page's side Fact Box.

#### Budget viewing

The first way to view the budget is by using Cost Categories, you can compare your budget by your predefined Cost Categories. Cost Categories is a user defined unlimited amount list. This organization uses Field Labor, Freight, Machine, Material, Miscellaneous, Overhead, Service, Shop Labor, Travel, Subcontractors, and a few others. Within the statistics page employees can see estimated cost, actual cost, estimated hours, remaining hours, and a lot more.

The second way is through the sequence of the work being done (tasks within the job). For example, one of this organization's simple tasks include planning, providing the service, testing the service, and issuing the billing. Here you see Budget (Total Cost), Usage (Total Cost), and other fields all against the predefined tasks.

## Case Study: Job Shop Software for Business Central

### Job Subcategories

Once the job has been created employees are now able to split this job into subcategories. For example, this organization has their master job and then splits this into 3 subcategories: Design, Fabrication Portion, and Installation and Billing. Employees can now see Tasks and Bill of Materials for each job subcategory.

### Procurement

Employees can now do all of the buying for the Master Job and its subcategories from a single screen. Items can be imported directly from CAD software or typed in as needed. Purchasing is done much quicker because of the ability to generate Purchase Orders with ease. Employees can see Quantity to Requisition and who the vendor is to buy from. They simply select "click create requisition" to make an entry into the requisition worksheet to allow them to automatically generate a Purchase Order by pushing planning lines to the Purchase Order.

### Results

Business Central for Job Shops has increased productivity as well as employee morale due to features and functionality specific to Job Shops. One employee said, "I reduced my month end closing process to 3 days from 20 days." Productivity has also increased because of the Microsoft Outlook integration with Business Central that allows the organization to manage business interactions with their customers and vendors, directly from Outlook. "You're able to easily see financial data for customers and vendors, as well as create and send financial documents like quotes and invoices so it's a no brainer that productivity increased," said Michael Intravartolo, Solution Systems, Inc.

Reporting has been simplified with the help of the fully integrated Microsoft Power BI solution. By combining Business Central with Power BI reports can be created with ease and shared with top management quickly. "The visuals are really what stands out for top management because it enables you to quickly discover upward and downward trends," said Michael Intravartolo, Solution Systems, Inc.

**Increase your Job Shops productivity by getting in touch with  
Solution Systems!**