



Dynamics 365 Upgradation Renews Operational Energy for a leading distributor and marketer of energy, automotive and lubricant products in North America

Our Client:

High performance is always a differentiating value

One of the leading distributor and marketer of energy, automotive and lubricant products in North America



Business Need: A Better Way to Do Business

The company had always believed in investing to find better ways to work. However, in 2018 they realized that when it came to their IT infrastructure, the core application, i.e. ERP AX 2012 on which the entire operations ran was heavily customized and they were dependent on an Independent Service Provider (ISV) who had to constantly support them and help with customizations, integration and to manage IT infrastructure. The process often resulted in delays, operational issues and escalating costs.

To be in the forefront of the business as well as provide a competitive edge to their customers, the client needed a robust platform that was as innovative as they were in their business.

The application had to provide superior functionality, energize the team to maximize its usage through simple user-friendly interface and provide a cost advantage which they could measure.

Most importantly, it had to be upgradation compatible to ensure future updates with minimal disruption and cost.



Why Sonata: Match Purpose with Passion

Sonata was selected as a partner of choice because of its strong experience and expertise as well as its home-built accelerator which would ensure that the migration would be seamless, reduce operational disturbances, and be cost effective.

Based on a thorough understanding of the business, Sonata, as a long-term strategic partner of Microsoft, highlighted to the client the advantages of migrating the entire platform to MS Dynamics 365. The migration would empower the automotive company to embrace digital transformation, reduce dependency on the external ISV and offer all the advantages of the various third-party applications in one single platform.



Solution: Renewable Energy Infused into Operations

In 2018, Sonata migrated their existing AS 2012 to MS Dynamics 365 Version 7.3 for Operations. This migration was followed by upgradation to MS Dynamics 10.7 in 2019



- ▶ The team implemented D365 for finance - General Ledger, Accounts Payable, Account Receivable and Cash & Bank Management
- ▶ Sonata upgraded management reports and ensured seamless interfaces for data exchange with various business applications like Invoicing, Payroll, Card payments etc
- ▶ Functional enhancements for improved data connectors and efficient financial transaction management were included
- ▶ The team converted all Precision forms ISV reports to standard SSRS reports
- ▶ QA, functional and performance testing of the converted code base including new features. The application was automation tested using the RSAT tool



Benefits: Measurable Value from IT Operations

With the new upgraded Microsoft Dynamics 365 solution, the company saved costs by avoiding the development of custom functionality in Dynamics AX 2012. This also laid a foundation for leveraging various advanced features available out-of-the-box in MS Dynamics 365 for Finance & Operations.

- The upgradation resulted in substantial cost savings from ISV licenses.
- Performance improvement for key business processes resulted in seamless integration and improved business operations.
- Automation testing using RSAT tool reduced manual intervention in subsequent deployment.
- The client realized \$4.88M revenue over three years with consistent 70% margin.
- The upgradation laid the foundation for a future potential of leveraging various advanced features available out-of-the-box in MS Dynamics 365
- Financial reporting was simplified and helped in strategic business decision making.
- Operational activities including month end closures effort was reduced by over 50%.



WHY SONATA?

Sonata's platformation approach helps clients to choose a solution that best fits their needs; balancing readily available platforms and solution customization

1. Sonata READY: End-to-end, industry-specific digital business platforms
2. Sonata ACCELERATE: Deploy popular horizontal platforms adding required functionality
3. Sonata CUSTOM: Engineer custom platforms that deliver unique digital capability and scalability

Crafting a personalized experience has been a significant differentiator for retailers. We understand that the core principles of retail and the emerging trends of digital transformation in the Retail. With the track record of delivering futuristic solutions, we help retailers to redefine the boundaries of engagement with customers across their journey, from home to store to social-media

Our Dynamics value prop:

- Sonata is an expert in Microsoft technologies including Dynamics 365, Azure, Power BI and other stacks.
- We leverage our 360-degree relationship with Microsoft in the execution of our projects
- Sonata has products that enable digital and Omni commerce solutions in Retail and Distribution Industry. BRICK and CLICK is an integrated Digital Retailing Solution with B2C, B2B, Mobility, MPOS, and Retail Analytics - A complete Package built on Dynamics 365.
- Track record in rolling retail implementations - To name a few
 - One of the leading women's fashion active wear brand with 300+POS Machines across 200+ Stores.
 - American tyre manufacturing giant, \$15B manufacturer & retailer, a mobile first distribution solution to improve sales effectiveness and efficiencies.

Sonata is a global technology company, that enables successful platform based digital transformation initiatives for enterprises, to create businesses that are connected, open, intelligent and scalable. Sonata's Platformation™ methodology brings together industry expertise, platform technology excellence, design thinking-led innovation and strategic engagement models to deliver sustained long-term value to customers. A trusted partner of world leaders in the Retail, Manufacturing & Distribution, Travel and Software industries.

Sonata's solution portfolio includes its own digital platform such as Brick & Click Retail Platform®, Modern Distribution Platform®, Rezopia Digital Travel Platform®, RAPID DevOps Platform®, Kartopia E-commerce Platform®, Halosys Mobility Platform®, and Commodity CTRM Platform®, best-in-class capabilities on ISV digital technology platforms such as Microsoft Dynamics 365, Microsoft Azure, SAP Hybris, Cloud Engineering and Managed Services, as well as new digital applications like IoT, Artificial Intelligence, Machine Learning, Robotic Process Automation, Chatbots, Block Chain and Cyber Security. Sonata's people and systems are nurtured to bring together the depth of thought leadership, customer commitment and execution excellence to make a difference to business with technology.



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