

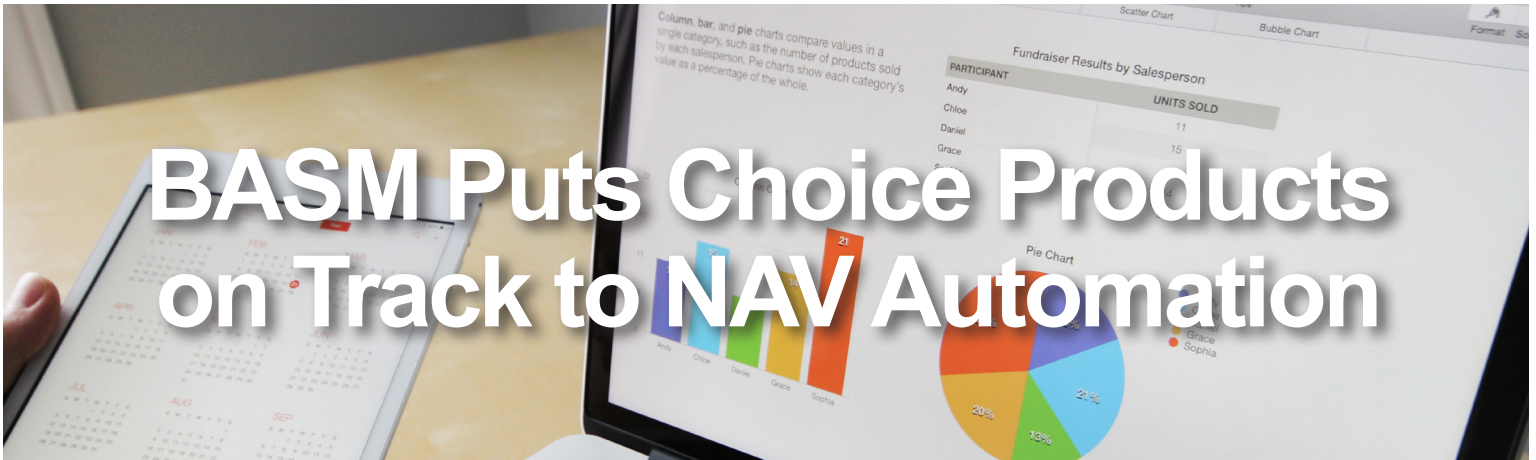


Business Automation Specialists
of Minnesota, Inc.

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Case Study

The right mix of technology and practical business experience.



BASM Puts Choice Products on Track to NAV Automation



“ *In the old system, we had a lengthy process and transactions for month end, including printing reports and tying out data and numbers. That doesn't exist in NAV, because it's all automated.* ”

Gwen Snyder
Choice Products Controller

As manual processes started to consume Choice Products, specialists in school fundraising programs and products, the company decided to move to a full ERP solution versus their outdated accounting software. Choice turned to Business Automation Specialists of Minnesota (BASM) to help them, and Microsoft Dynamics NAV as the ideal solution for their needs.

According to Fran Bistodeau, project manager at BASM, “Choice had some very specific needs that were unique to their industry and product offerings. NAV provides the flexibility to make the system work the way Choice Products needs it to work. We spent a number of months up front, working on matching their processes in the system, so that when they went live, they would be fully up and running.”

Choice had developed a custom application to manage their unique business processes. This software managed the order entry system, truck-loading for their picking, packing and Bill of Lading process. BASM opened NAV's Web services and made a few tweaks so enable Choice's IT Director, Brad Shilts, to convert orders directly into NAV, for a seamless operation. As the set up was taking place, the team at Choice went through training, so that they would be ready when the system was.

When the system was ready and the training was complete, Choice Products went live for the New Year. Spreadsheets in their former system, were now replaced by reports generated out of NAV. Additionally, the complicated G.L system was replaced by a streamlined chart of accounts, using a “dimensions” functionality to help breakdown information by company, department and sales person. This reduced and simplified the account structure, giving more control over users to define who can do what, when, which processes, and access to financial data. The system prevents posting into closed months, for accurate reporting.

Choice Products Controller, Gwen Snyder, can now view transactions, see where everything is posting to and can make corrections if needed instead of issuing credit memos or corrected invoices. “In the old system, we had

a lengthy process and transactions for month end, including printing reports and tying out data and numbers. That doesn't exist in NAV, because it's all automated," proclaimed Gwen. The new month end process allows for Gwen to close posting for the month, reconcile balances, and then move on. Choice Products can view reports as of any date to get the information needed.

Other functionality that saves the company time and error prone process include:

- Using the NAV Production Order and BOM functionality to produce products. This process automatically reduced raw material quantities and produced finished goods with accurate costs. This eliminated month end adjustments and reclassification of inventory.
- Production orders also include packaging costs for finished items and so forth, thus, eliminating the end of the month adjustments Gwen would typically make. This also provides more accurate product costing.
- Choice makes refunds to third party individuals other than their initial customers. Using an ISV product allow Choice create credit refunds for third party individuals other than their initial customers. This eliminates the need to create and maintain contact for non - customer's customers/vendors that they would not sell to otherwise.

Among the many efficiencies Choice achieved by moving to NAV was in their Inventory department. NAV eliminated that by using NAVS "Assembly-to-Order" which automatically posts costs and quantities as products ship to order. This represents one of the largest time savings for Choice by automating their processes.

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Fran Bistodeau
Project manager at BASM

BASM President, Ron Ketterling, said, "Choice Products is a company that knows how to use automation to support their unique business proposition. Technology is a multiplier for their staff and customers, allowing them to provide more service with less effort. We worked with Choice back in the Y2K days (before they bought a company that had some industry specific software). We are glad to have them back as a client."

With 10 -15 people using the system, more and more efficiencies and reporting capabilities will be gained as the company continues to grow. The best part about NAV is its ability to grow with them and continue to meet Choice Products needs with its flexible design.

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BASM is a business automation solution provider. We team with our clients to help them achieve their business objectives through appropriate application of business automation software. This focus on objectives enables us to suggest new or revised business processes, streamline procedures, increase effectiveness and meet new challenges.

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