



SOLUTION BRIEF

Customer Profile

Shared Technologies is a national solutions provider of voice and data solutions. They sell and service brands such as Nortel, Avaya, and others.

Business Situation

Shared Technologies needed to replace their custom developed solution with a full ERP solution that could meet a range of sales and service needs.

Solution

Microsoft Dynamics AX

Benefits

- > Increased reporting accuracy and operational visibility
- > Cost-savings through streamlined processes
- > Solution has scaled with the economic ups and downs

Industry

Distribution

ePartners Success Story

Communications Solutions Provider Streamlines Financial Management with Microsoft Dynamics AX

Managing a complex set of variables into a consistent financial picture used to be a laborious task for Shared Technologies, but not anymore.

Shared Technologies is a voice and data solutions provider headquartered in Coppell Texas. Founded in 1977 as a regional communications hardware provider and service organization, Shared Technologies has grown into a national leader in sales and service. The company was honored in 2009 as a Fortune 100 best company to work for by Fortune Magazine.

Choosing a Solution that can streamline complex needs:

In 2004, Shared Technologies began their search for a new financial management solution. Their system at the time was a custom developed solution (called RS6K internally) which was no longer meeting their needs. A major challenge with the system was inconsistency in reporting. Glitches in database queries caused reports run with the exact same parameters but on different dates to yield different results. The company had also just acquired additional offices, had named a new company president, and was interested in taking the company public.

One of the main team members tasked with finding a new solution was Annette Price, Financial Systems Manager. "As a sales and service company, we needed a solution that would grow with us and that could be customized and perform against a range of inventory and service requirements," says Price. "We had needs related to sales, inventory management, annual service contracts, and recurring billing."

Price admits to having high expectations of a new solution and a provider. "I was biased toward JD Edwards," she says. "I have implemented the JD Edwards solution five times in my career and I understood the power of a 'Tier One' solution. But I also know how much it costs to put in a JDE system and support it. Shared Technologies wasn't at the size to justify the cost."

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Instead, Annette short-listed Microsoft Dynamics AX as one of the options and found ePartners. "After our executives saw Dynamics AX, and saw the costs, it was a no brainer for us," she said. "Dynamics AX could do what we needed, and we were able to get in early with a product that I believe will be a tier one product in their next version. It was a big savings because our IT department is a SQL shop. We didn't need an Oracle DBA at a starting salary of \$200k a year to support the system."

A Solution that Scales with the Economy:

Implementation began for Shared Technologies 100+ users in 2005. ePartners worked with Shared Technologies to design an implementation plan that met their requirements, budget, and timeline. ePartners was responsible for implementing the Dynamics AX application and training. Shared Technologies opted to perform the data migration and develop interfaces to their sales and contract management system (Aspect and PRODO) in-house.

"We achieved a fast return on investment on Dynamics AX," says Price, "and we have a much better view of our overall operations." While leveraging ePartners for data migration would have provided faster results states Price, the results of having a truly integrated solution have served them well through the economy's ups and downs.

"Like many organizations, we have scaled our organization to respond to the economic conditions. We are currently running approximately 60 users versus 100, and have been able to do that fairly easily. When things pick back up, we can scale up."

Integration that streamlines and cuts costs:

The factor that has allowed Shared Technologies to operate so seamlessly with less is their integrated solution.. "The three systems (ERP, Sales and Service) are tightly integrated so that we rarely have manual processes," says Price. "We manage all AP, AR, inventory, GL, reporting, and ebanking in Dynamics AX. We have built integrations with our other systems to trigger Dynamics AX to create an invoice, set up a billing schedule, item requisition and sales order, and reflect in the bill of materials. And from our service application, Dynamics AX is triggered when service dates hit, then we process inventory, invoices and recognize the revenue." says Price. "We also have integrations to hit the labor journal and not process an invoice should the contract be set up on an annual maintenance agreement."

Real-time Business Intelligence:

As financial reporting was a particular challenge in the past, this is one of the most-improved areas of visibility for Shared Technologies management team. Shared Technologies utilizes SQL reporting and the Atlas analytical tool to produce financial reports with perfect accuracy.

Future Plans:

Shared Technologies is currently planning their upgrade to AX 2009, which Price believes to have achieved the functionality of a "tier one" solution.

More information on Shared Technologies can be found at www.sharedtechnologies.com.



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