

Modernizing Wholesale Distribution with Business Central



Project Summary

Status: Completed

Wholesale distribution connects manufacturers to retailers through efficient inventory management, logistics, and order fulfillment. As the industry evolves, distributors increasingly rely on modern ERP systems to replace legacy tools, enabling real-time visibility, warehouse automation, and mobile access for field teams.

Challenges:

- ✔ **Legacy ERP Limitations:** Supply Smart's outdated ERP lacked flexibility, automation, and mobile access, making core operations like order processing and inventory management slow and error-prone.
- ✔ **Poor Cash Flow Visibility:** Financial forecasts were manually compiled in spreadsheets, resulting in delays and unreliable insights into future cash positions.
- ✔ **Inefficient Warehouse Operations:** Without bin tracking or barcode scanning, warehouse teams faced frequent stock discrepancies, delayed picking, and inaccurate inventory data.
- ✔ **Disconnected Sales & Purchasing:** Sales and procurement processes were siloed. There were no automated approvals or mobile tools for field teams to confirm deliveries or generate invoices.
- ✔ **Manual Logistics Planning:** Delivery routes were planned manually, leading to inefficient scheduling, higher transportation costs, and poor visibility into shipment status.
- ✔ **Lack of Inventory Traceability:** No support for lot or serial number tracking made it hard to trace items, manage quality issues, or conduct accurate stock valuations.

Solutions:

- ✓ **Replaced Legacy ERP with a Modern Cloud Platform:** Business Central provided a flexible, scalable cloud ERP that unified operations across departments. With built-in automation and mobile accessibility, core processes like order management and inventory tracking became faster, more accurate, and less manual.
- ✓ **Enhanced Cash Flow Visibility & Forecasting:** Automated financial data collection and forecasting using the Cash Flow Worksheet. Integrated sales, purchases, receivables, payables, and manual inputs gave Supply Smart real-time insight into cash positions, improving financial planning and control.
- ✓ **Improved Warehouse Efficiency & Accuracy:** Enabled Bin Tracking and Barcode Scanning through Mobile WMS integration, allowing warehouse staff to manage inventory in real-time. This reduced picking errors, improved inventory counts, and streamlined receiving and cycle counting.
- ✓ **Unified Sales & Purchasing Processes:** Connected sales and procurement in one system. Used approval workflows for high-value transactions and allowed mobile teams to confirm deliveries and auto-generate invoices eliminating delays and improving field team efficiency.
- ✓ **Automated Logistics & Dispatch Planning:** Business Central's Route Management and Shipping Agent setup automated delivery planning. Drivers used mobile devices to confirm deliveries, collect e-signatures, and update statuses in real-time, improving transparency and reducing delays.
- ✓ **Enabled Inventory Traceability:** Implemented Lot and Serial Number Tracking, allowing full traceability of items from receipt to delivery. This enhanced product quality control and simplified audits and compliance reporting.

Tech Stack:

ERP Platform: Microsoft Dynamics 365 Business Central (Cloud-based)

Warehouse Management: Integrated Mobile WMS apps (e.g., Tasklet Factory, Insight Works)

Barcode Scanning: UPC, GTIN barcode standards with handheld scanners/mobile devices

Cloud Infrastructure: Microsoft Azure (hosting Business Central)

Business Intelligence: Power BI for real-time dashboards and reporting

Integration Tools: APIs and connectors for bank reconciliation, CRM, and third-party logistics

Results:

- ✓ **Operational Efficiency:** Reduced manual processes by 60%, speeding up order processing, inventory counts, and delivery confirmation.
- ✓ **Inventory Accuracy:** Improved stock accuracy by over 95% through barcode scanning and bin tracking.
- ✓ **Financial Control:** Achieved real-time cash flow visibility, improving forecasting accuracy by 40%.
- ✓ **Faster Delivery:** Optimized route planning and mobile dispatch reduced delivery times by 25%
- ✓ **Enhanced Traceability & Compliance:** Full lot and serial tracking ensured rapid product recalls and quality audits.
- ✓ **Improved Decision Making:** Managers gained instant access to key KPIs through Power BI dashboards, enabling faster, data-driven decisions.