



## CASE STUDY

# ERP Product Selection and Implementation for a Growing Florida-based Enterprise

MXOtech leveraged improved technologies to help the client deliver on its promise to provide “just what you need, just when you need it.”

## Background

We engaged a medium-sized distribution company located in the heart of Florida. They specialize in high-volume transactions supplying companies across the country with grower and packer supplies, shipping supplies, industrial adhesives, janitorial supplies and harvest/storage bins.

The dynamic nature of the business and the significant competition in this industry pushed the client to look for a more highly integrated and efficient Enterprise Resource Planning (ERP) software package with more robust Inventory Management capabilities than their old system. The existing AS/400 ERP environment was outdated, with many customizations to support the shortcomings of the software, thus making the upgrade path incredibly inefficient and cost prohibitive to achieve a modest improvement.

The client was in need of more streamlined daily operations, robust technology, better reporting and user-friendly interface.

## Approach

MXOtech took the lead on this implementation in every single aspect – from the selection and set up of the networking environment, installation and configuration of the EPICOR 9 software to project management, budget projections and monitoring, and direction of the user team. The backend was provisioned on an environment featuring Windows Server R2 with SQL Server R2 databases. Terminal Services server was configured to support the scan gun operations. MS SharePoint was utilized as a customer/vendor facing portal, fully integrated with Epicor, to allow convenient self-service functionality and as a project management tool to organize the actual implementation project.

MXOtech worked hand-in-hand with the client’s key users on testing the application and together conducted many ‘proof of concept’ sessions to confirm that the new system is set up and working properly from a technical and business process perspective. Integration with other current systems that were in place at the client (like the eCommerce solution) were also considered and carefully evaluated to ensure the continuation of the business flow.

## Results

With MXOtech’s leadership, advice and direction, the client implemented a state-of-the-art ERP solution to support their growing activities and customer base. The improvements in the Inventory Management area alone – which includes new scan gun functionality and more streamlined shipping and receiving practices among others – will allow the client to handle their operations with the same number of warehouse staff even after they acquired a new company, similar in size, and added another warehouse location in central Florida. In addition, internal business processes have become more efficient, transparent and collaborative with the new system while the capabilities for financial reporting, dashboards and data analysis are unsurpassed.

## Technology

- ERP Software: Epicor 9 - Platform
- Microsoft Sharepoint