



Transport Fleet Services Firm Shifts From Paper Processes with Microsoft Dynamics NAV

Overview

Country: Canada

Industry: Service/Manufacturing

Customer Profile

Founded in 1971, Peel Truck & Trailer Equipment provides complete repair and preventive maintenance services designed to keep fleet owners on the road and in optimum working condition.

Business Situation

To ensure more accurate work order processing, the firm was looking to move away from standalone IT systems and reduce its paper-based manual processes.

Solution

Peel Truck implemented Microsoft Dynamics NAV® software as a common enterprise resource planning (ERP) system for its management and accounting processes. Standardizing on a common platform also enables Peel Truck & Trailer to make more informed business decisions and improve inventory tracking accuracy by 33 per cent.

Benefits

- Streamlined IT Operations
- Increased Employee Productivity
- Improved Inventory Tracking

"There is a changing of the guard in the trucking industry. We're finding that the effective use of technology such as Microsoft Dynamics NAV will be a key competitive differentiator for us."

Dennis Di Franco, Controller, Peel Truck & Trailer Equipment Ltd., and Innovative Trailer Design Industries Inc.

Founded in 1971, Peel Truck & Trailer Equipment provides complete repair and preventive maintenance services designed to keep fleet owners on the road and in optimum working condition. To ensure more accurate purchase order processing, the firm was looking to move away from standalone IT systems and maintain more accurate records of its employee labour. Working with Microsoft® Gold Certified Partner EC Advance, Peel Truck implemented Microsoft Dynamics™ NAV software as an enterprise resource planning (ERP) system for its management and accounting processes. With Microsoft Dynamics NAV in place, Peel Truck is unifying its financial processes – operational tasks such as tracking and auditing are now more efficient. Standardizing on a common platform also enables Peel Truck & Trailer to make more informed business decisions and improve inventory tracking accuracy.

Situation

Mississauga, Ont.-based Peel Truck & Trailer Equipment has been repairing trucks and trailers for over 36 years. Today, Peel Truck & Trailer Equipment is a veritable one-stop shop for fleet repairs, aftermarket parts and its new custom fabrication division, Innovative Trailer Design Industries (ITD). With more than 100 employees, the company prides itself on its innovation and creativity, and has developed a market leading reputation for extensive expertise, quality repair work, and on manufacturing virtually anything to do with a transport vehicle.

Often considered a traditional sector, the trucking industry is one that is growing increasingly dependent on technology. According to Dennis Di Franco, Controller at Peel Truck & Trailer Equipment and Innovative Trailer Design Industries, one of the challenges for Peel Truck was around processing quotes, sales orders and inventory in a disparate IT environment still largely based on manual processes, fragmented information and stand-alone systems. Staff had to dig through files to get a real picture of a particular job, but could not look at data on a holistic view, or per customer.

"The trucking industry is becoming much more modernized and updating technology is a great way to gain a competitive edge. We needed a solution that would cut down on inventory errors, track labour output and allow us to make more informed business decisions, faster," says Di Franco.

To complicate matters, the company's outdated Accpac platform featured limited integration capabilities and lacked the ability to accurately track both resources and parts across the company's 38 service and manufacturing bays, and two inventory warehouses. This environment was creating a situation where data entry errors couldn't be corrected in real-time, affecting inventory

counts. For example, workers at Peel Truck were spending an inordinate amount of time manually inputting purchase order data into the company's fragmented IT environment. Peel Truck needed a better way to track inventory as the previous system was making it difficult to keep an eye on rising supply costs — or to create purchase orders to take advantage of volume buying.

With business information stored in different locations, running reports and ensuring data accuracy was nearly impossible. In particular, time tracking was critical as management needed to know that its labour count was accurate.

"With multiple systems, employees were inputting data multiple times. We really needed to streamline data entry in order to deliver better client service and I didn't think we could find an affordable labour tracking system," says Di Franco. "With Microsoft Dynamics NAV manual inputting is a thing of the past, and this means faster and more accurate service for our clients." The biggest challenge was building the labour time recording system. I could not believe that a complete software would allow me to set the rules. And now any time of the day I can see right down to the job LIVE who is working were.

Solution

With an eye on optimizing its operations, Peel Truck developed the outline of its new software and enlisted the help of EC Advance to recommend and implement a suitable business management software solution.

Peel Truck operates within a Microsoft Exchange Server™ and Windows Server 2003 environment that includes Microsoft® Windows® XP operating system and Microsoft® Office® system on the desktop. In order to maintain a consistent IT look and feel, EC Advance recommended that Peel

Truck implement Microsoft Dynamics NAV. In addition to the core accounting functionality, Microsoft Dynamics NAV is a real-time management system that allows Peel Truck to better access data across the organization. The new environment enables the firms to develop a complete approvals process for manager to verify data and directly approve next steps. The solution, for example, integrates seamlessly with Peel Truck's existing applications and work on a variety of platforms allowing for more efficient financial management.

"Managers are now able to query the system for on-line information within and across all applications and view it instantly on the screen," says Reno Capano, CEO, EC Advance. "The system now quickly provides staff with the data they need to trace each job on each individual customer units and approve pricing."

The software is helping Peel Truck integrate critical financial, operations, customer, distribution and e-commerce data into a streamlined, comprehensive platform to increase productivity.

"Having the right partner with the right knowledge about our business allowed us to deploy the solution we needed quickly and within our budget," explains Di Franco. "EC Advance was able to enhance our original plan of baseline functionality requirements, and understood our need to integrate with various legacy systems and the need to incorporate the existing business processes that might need to be changed or incorporated for the future – their expertise was invaluable."

Benefits

By streamlining its inventory and purchasing processes, employees at Peel Truck can work more efficiently with less data entry errors. With Dynamics NAV in place, the company

estimates that it is already saving 33 per cent in productivity gains.

"There is a changing of the guard in the trucking industry. We're finding that the effective use of technology such as Dynamics NAV will be a key competitive differentiator for us," adds Di Franco. "Fellow CFOs and Controllers in the industry ask me how I do it, and when I show them how I can bring up the history of a particular truck and show all seconds of labour on that unit, including every nut and bolt, they are shocked."

Streamlined IT Operations

By streamlining and integrating IT processes, the new solution provides Peel Truck with real-time information across the organization, allowing them to make more informed decisions on a timely basis. The company can also better connect suppliers and partners with concurrent online access to up-to-date information, helping them bring projects in on time and within budget.

Inventory used to be a nightmare for us and I dreamed of a wireless handheld unit that would allow us to make live counts, and the ability to separate counts per location, with minimal error," says Di Franco. "EC Advance presented me with A Windows Mobile® CE handheld and I was able to see counts in each location and even by different sections per warehouse. I was able to verify and post the inventory with the most accuracy in seven years and on top of that we are now able to cut the whole process from thirty two hours down to eight."

Increased Employee Productivity

By simplifying processes and integrating operations and financials, staff can work more efficiently. Managers can now better manage resources and personnel data across the organization in real-time, cutting down on manual processes. And by collecting data in a central repository, Peel Truck is able to

eliminate the cumbersome task of entering inventory and purchase order information numerous times.

"Peel Truck runs a pretty 'lean and mean' operation and the functionality they have now is light years removed from the old system. Not only can managers track all active jobs and inventory in real-time, they now deliver better client service by having much more visibility from sales, jobs, units, resources and inventory movement," says Capano.

"We can get an accurate snapshot of where resources are being used and if need be, depending on rush jobs or importance, can assign personnel as needed. It's giving us greater flexibility around inventory and staff scheduling," adds Di Franco.

Improved Inventory & Labour Tracking

Better integration means better processes at Peel Truck. Staff can now quickly track inventory, so that once an automotive part is ordered, they can reference that original quote and the order within the system – there's a better trail right from the beginning to completion and delivery of that service.

"We now have better tracking of inventory and parts and people right down to each nut and bolt – including where it was purchased and when," says Di Franco. "It's providing us with visibility into business cycles that we could only dream of before and is actually changing the way we engage with clients moving forward."

With Microsoft Dynamics NAV, Peel Truck is now able to track labour hours and costs with ease. "For the first time in our company's history I was easily able to calculate the cost of labour per billable hour in mere minutes," says Di Franco. "In the past I worked for days trying to pull this data manually, and now have the power to crunch numbers like larger

firms, and would now refuse to have this true power of data to be taken away from me."

In the transportation industry, skilled labour is difficult to come by, explains Di Franco. With Microsoft Dynamics NAV, Peel Truck can attract the highest quality staff and skilled resources, allowing the company to be more competitive and become industry leaders.

"The key benefit for us from choosing Microsoft Dynamics NAV as our business management solution is continuity and stability for future growth," says Di Franco. "We don't need to change systems in the future as I'm confident that if and when a change is required, the solution will allow us to easily and cost-effectively adapt, and adaptation is the key to longevity in any business."

For More Information

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For more information about EC Advance products and services, call 416.321.3220 or visit the Web site at: www.ECadvance.com

For more information about Peel Truck & Trailer Equipment Ltd., and Innovative Trailer Design industries Inc. products and services, call 905-670-1780 or visit the Web site at: <http://www.peeltruck.com> www.itdtrailers.com

Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

For more information about Microsoft Dynamics, go to: www.microsoft.ca/dynamics

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