



## Microsoft Dynamics Customer Solution Case Study



## Distributor Streamlines Processes, Reduces Data Entry Errors by 50 Percent

### Overview

**Country or Region:** United States  
**Industry:** Manufacturing – Industrial  
Equipment and Machinery Industry

### Customer Profile

Unitech America distributes automatic information and data collection products to customers in North and South America. Based in Southern California, the company has 45 employees.

### Business Situation

The company's business management system could no longer accommodate its needs—poor product tracking, inflexible reporting, and limited business insight were just some of the challenges faced.

### Solution

Unitech America teamed with Apex Computer Systems to replace its old business management system with Microsoft Dynamics™ NAV, and in just 90 days rolled out the solution to 22 employees.

### Benefits

- Human error reduced by 50 percent
- Real-time business insight
- Streamlined processes

“Since implementing Microsoft Dynamics NAV, we’ve reduced data entry errors by 50 percent—a reduction that also helps us save U.S.\$60,000 a year.”

Vincent Shu, CEO, Unitech America

Unitech America, a subsidiary of Taiwan-based Unitech, is a leading distributor of automatic information and data collection products. To complete inventory and supply chain management, the company used a Sage MAS 90 business management system. But after a decade of use, the company needed a more flexible system that would provide real-time data insight and rich product tracking capabilities as well as reduce data entry errors on orders. Unitech America teamed with Microsoft® Gold Certified Partner Apex Computer Systems and in just 90 days rolled out Microsoft Dynamics™ NAV 4.0 to 22 employees. In little more than a year, the company reduced errors on orders by 50 percent, saving U.S.\$60,000. It now has comprehensive insight across its inventory, sales, and customer service processes and streamlined its reporting and month-end closing processes.



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Rich Phan, Sales and Marketing Manager,

## Situation

Unitech was founded in 1979 in Taipei, Taiwan, to provide the local market with customized, microprocessor-based automation systems. Since that time, Unitech has focused on developing automatic information and data collection (AIDC) products and services that help its customers enhance productivity and efficiency. Today, the company manufactures a full range of AIDC products, including rugged personal digital assistants (PDAs), bar code scanners, magnetic card readers, portable and fixed terminals, and a variety of keyboard products.

Unitech America, a subsidiary of Unitech, is responsible for distributing products to a wide range of customers in North and South America who have inventory centers or who handle shipping and receiving. Headquartered in Southern California, Unitech America has annual revenues of U.S.\$20 million.

For almost a decade, Unitech America used Sage MAS 90 to support its inventory and supply chain management needs, but the system could no longer accommodate this growing company's business requirements. The primary challenge was the inability to track serial numbers associated with products, which made it difficult to accurately measure inventory and track product returns, warranty claims, and general customer purchasing behavior.

Unitech faced other challenges as well. Explains Winny Sun, Controller for Unitech America, “Beyond the inability to track serial numbers, we had several other issues with our existing system. Data was not available on a real-time basis, so we'd have to wait until the end of the day to get an accurate read on inventory numbers. Reports could not be modified, making it difficult for us to accommodate changing reporting requests from our head office [in Taiwan]. And finally,

we had no way to prevent data entry mistakes on orders, which resulted in duplicate or incomplete orders.”

Overall, Unitech America needed a more flexible business management system that would provide real-time insight into business metrics, streamline processes, and significantly reduce data entry mistakes.

## Solution

In its search for a new business management system, Unitech America considered several possibilities, including the Sage MAS 200 and Microsoft Dynamics™ NAV 4.0. As part of the evaluation process, the company turned to the Unitech Europe office as well as local businesses with similar business operations to learn about their experiences with various business management systems. After receiving considerable positive feedback about Microsoft Dynamics NAV, the choice was easy.

“Microsoft Dynamics NAV is a flexible solution that is rich in capabilities—we were able to pick and choose the features we needed to create a system that accommodates all of our business needs,” says Vincent Shu, CEO for Unitech America. “And because it's based on the Windows® operating system, it provides a familiar working environment for existing employees and new hires alike.”

To help implement the solution, Unitech America turned to Apex Computer Systems. Also based in Southern California, Apex is a Microsoft® Gold Certified Partner and a leading software solutions provider to small and medium-size businesses. Unitech America and Apex already had a long-standing business relationship, so working together again was a natural fit.

In July 2005, two developers from Apex and one from Unitech America teamed up to implement Microsoft Dynamics NAV. The

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Winnie Sun, Controller, Unitech America

team deployed a selection of modules for financial management, sales and marketing, and distribution. Business data is stored on a Microsoft SQL Server™ 2000 database server. The openness of Microsoft Dynamics NAV allows the system to exchange information with an internally developed system that manages product returns. The team also built custom menus and created reports and data import and export templates that pull data from Microsoft Dynamics NAV and Microsoft Office 2003 applications and export it into Microsoft Office Excel® 2003 spreadsheet reports (for the head office).

Just 90 days after project kickoff, Microsoft Dynamics NAV was rolled out to 22 people in different departments throughout the company.

“Today, Unitech America has a powerful, flexible system in place that manages the company’s entire back office, all the operational warehouse inventory, and some front-office processes for customer service and sales,” explains Rich Phan, Sales and Marketing Manager for Apex. “And the company achieved this rich functionality without extensive customization.”

### Benefits

Since implementing Microsoft Dynamics NAV, Unitech America is more than pleased with the results. The company reduced data entry mistakes by 50 percent, has comprehensive, real-time insight into its business, and streamlined many processes, including reporting.

#### Human Error Reduced by 50 Percent

With Microsoft Dynamics NAV, Unitech America implemented several methods, such as error messages, to greatly reduce the number of mistakes made while processing orders. For example, if an employee fails to enter a purchase order (PO) number, Microsoft Dynamics NAV alerts the employee

to help ensure that the order is entered into the workflow. Similarly, an error message appears if an employee enters a duplicate PO number. The results are cost savings and increased customer satisfaction due to more accurate orders.

“We have a wide variety of error messages and tactics in place to reduce the chances of introducing errors into orders,” says Shu. “Since implementing Microsoft Dynamics NAV, we’ve reduced data entry errors by 50 percent—a reduction that helps us save U.S.\$60,000 a year.”

#### Real-Time Business Insight

Microsoft Dynamics NAV provides a comprehensive system for all information related to inventory, customer orders, and customer service interactions—data that is also available in real-time. Unitech America can also track account history, so when a customer returns a piece of equipment, the company can easily identify any associated invoices, payments, and more—a capability the company previously lacked.

“With Microsoft Dynamics NAV, all of the information Unitech America needs is available in a single system. As a result, employees can track customer or equipment information and answer questions, such as when equipment shipped or which lot equipment came from, and much more,” says Phan.

In addition, information is more accurate because Unitech America can adjust data for the prior month. Sun explains, “With our old system, I needed to close the month immediately and could not go back and make changes to the data. But Microsoft Dynamics NAV is so flexible that I can adjust data as needed—specifically for auditing purposes when we often have to make changes after the audit is finished.”

## For More Information

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For more information about Unitech America products and services, call (714) 891-6400 or visit the Web site at: [www.ute.com](http://www.ute.com)

For more information about Apex Computer Systems products and services, call (800) 969-APEX or visit the Web site at: [www.acsi2000.com](http://www.acsi2000.com)

## Streamlined Processes

Microsoft Dynamics NAV has enabled Unitech America to streamline many processes. For example, the company now easily accommodates the changing reporting needs of its head office—a task that once took weeks and often required the company to bring in a third-party programmer to create the appropriate report structure.

“It now takes Unitech America mere hours—instead of weeks—to produce reports because they can do it themselves,” says Phan. “These results can be attributed to the multidimensional functions of Microsoft Dynamics NAV, which make it easy for Unitech staff to slice, dice, and extract the right information for its head office. The integration between Microsoft Dynamics NAV and Microsoft Office also speeds up the process.”

In addition to reporting, closing processes have been shortened as well. Sun explains, “With Microsoft Dynamics NAV we don’t have to take as many steps to complete closing processes. It’s much easier, especially with bank reconciliation. While before it would take us one to two days to close out the month, it now takes no more than an hour.”

## 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.com/dynamics](http://www.microsoft.com/dynamics)

### Software and Services

- Microsoft Dynamics
  - Microsoft Dynamics NAV
- Microsoft Office System
  - Microsoft Office Excel 2003
- Microsoft Servers
  - Microsoft SQL Server 2000

### Partners

- Apex Computer Systems