



## Microsoft Dynamics Customer Solution Case Study



## Trade Organization Establishes Global Presence with World-Class ERP Solution

### Overview

**Country or Region:** Germany

**Industry:** Retail and hospitality – durable consumer goods

### Customer Profile

Located in Offenburg, Germany, Markant Handels und Service facilitates fair trade between wholesalers and retailers by managing the procurement and delivery of trade goods.

### Business Situation

To establish presence in the international trade market, Markant needed a powerful enterprise resource planning system with the capabilities to support a global effort.

### Solution

By deploying Microsoft Dynamics® NAV 5.0, Markant increased visibility into its supply chain, enabling international parties to easily collaborate and share insight.

### Benefits

- Improve supply chain visibility
- Guarantee quick and accurate data updates
- Provide a platform for growth

“The greatest benefits that come with Microsoft Dynamics NAV are the visibility into supply chain workflow and the transparency of the program.”

Project Manager, Markant Handels und Service

Markant Handels und Service is the third-largest trade organization in Europe. Headquartered in Offenburg, Germany, the company serves 90,000 businesses and generates U.S.\$66.4 billion in annual revenue. When Markant expanded operations into Asia, it needed an enterprise resource planning (ERP) system that could handle the complexities of a global supply chain. Markant worked with Microsoft® Gold Certified Partner agiles Informationssysteme to deploy Microsoft Dynamics® NAV 5.0 alongside Microsoft Office SharePoint® Portal Server 2003 and the agilesTrade and agilesWorkflow tools. With Microsoft Dynamics NAV, Markant has increased visibility into its supply chain, improved collaboration between international business partners and customers, and established itself as a leader in both the European and East Asian trade industries.



“Exception management and reporting of transactions through instant tracking of the supply chain has reduced the data processing workload of business partners involved in the supply chain by 70 percent.”

Christian Segal, CEO, agiles  
Informationssysteme

## Situation

Located in Offenburg, Germany, Markant Handels und Service is one of the largest and most reputable trade organizations in Europe. With subsidiaries in Worms, Germany and Hong Kong, the company helps facilitate fair trade and cooperation among nearly 100 independent wholesalers and retailers through a unique partnership that manages all aspects of procurement and delivery, including purchasing, central clearing, payment guarantees, logistics, marketing, communication, financing, and electronic services. Since 1920, Markant has grown to generate more than U.S.\$66.4 billion in annual revenue, securing the futures of 90,000 businesses throughout Europe.

While many of its competitors focus on maximizing the volume of imports brought to market, Markant seeks to speed the procurement and delivery of goods. This strategy requires Markant to maintain accurate, timely visibility into its supply chain and provide its business partners with access to accurate delivery times and up-to-date quality assurance reports. As a result, Markant has always relied on technology to provide high-quality services to its trade partners and customers.

In 2006, when Markant set out to expand operations into Asia, the complexity of the new global supply chain taxed the company's existing enterprise resource planning (ERP) systems. As the volume of imported goods and the number of partners increased, the company struggled to provide retailers with up-to-date information about order status and shipment schedules.

A disorganized document library and a lack of logistical insight limited the company's ability to estimate delivery times and monitor supplier links throughout the supply chain. “It was difficult to keep everyone updated on status and to provide correct

documentation,” recalls a project manager at Markant. “Without a document managing system, we were forced to collaborate through e-mail, and that led to version control problems.”

Lack of visibility into the supply chain status also contributed to heavy call volume among supply chain managers who were eager for regular updates. The company's SoftM Suite AS/400 mainframe system lacked the Internet functionality that would enable international trading partners to access information directly from the Markant systems.

For the global expansion to succeed, Markant needed an ERP solution that would facilitate collaboration among business partners through a remote connection and provide heightened supply chain visibility to business partners and customers.

## Solution

With help from Microsoft® Gold Certified Partner agiles Informationssysteme and a select team of local technology partners with specialized domain and technical expertise, Markant deployed a workflow and monitoring platform built on Microsoft technologies. The solution employs Microsoft Dynamics® NAV 5.0, Microsoft SQL Server® 2005, and Microsoft Office SharePoint® Portal Server 2003 to provide the remote access, rich collaboration, and supply chain visibility needed to support the transcontinental venture.

### A New Procurement Platform

Markant originally deployed Microsoft Dynamics NAV 4.0 alongside SharePoint Portal Server 2003, with SQL Server 2005 providing a stable, scalable database platform. The company subsequently upgraded to Microsoft Dynamics NAV 5.0 to take advantage of deep integration with the Microsoft Office system and new features

available in Office SharePoint Server 2007, which the company is in the process of deploying.

To support the distributed nature of the global trading venture required, Markant runs a single instance of Microsoft Dynamics NAV on a central server and uses Citrix to enable staff at more than 100 remote sites to access the system. agiles deployed its agilesWorkflow and agilesTrade tools to extend Microsoft Dynamics NAV with specific functionality for global trading operations. agiles also built custom connections that enable Microsoft Dynamics NAV to exchange ERP data with the SoftM Suite that runs on the company's AS/400 mainframe.

agiles participated in the Business Ready Enhancement Plan for Microsoft Dynamics to facilitate the deployment. The plan provides upgrade services and specialized training benefits. "The Citrix deployment and integration with SoftM created a technical landscape that we had not encountered with previous upgrades," explains Christian Sega, CEO of agiles Informationssysteme. "But the Business Ready Enhancement Plan gave us access to a high level of Microsoft technical support that enabled us to complete the upgrade in a matter of weeks, without disrupting core services at Markant."

Today, Markant uses Microsoft Dynamics NAV 5.0 to manage a growing global supply chain, including purchasing, sales order processing, logistics, workflow management, and reporting. The company uses SharePoint Portal Server 2003 to publish and share data, and archive sales orders and invoices.

#### **Communication and Collaboration**

The integration between Microsoft Dynamics NAV and SharePoint Portal Server 2003 supports collaboration and communication among trading partners and customers. "We built a component that connects Microsoft

Dynamics NAV directly to SharePoint Portal Server 2003, which enables suppliers, quality control representatives, and customers to quickly create and publish new role-based Web portals within Microsoft Dynamics NAV," explains Sega. Employees can also use this site-creation tool to publish their own portal pages, enabling them to collaborate and share data related to specific trades or transactions.

When Markant completes the integration between Microsoft Dynamics NAV and Office SharePoint Server 2007, the company will enjoy added functionality to Web portals and enhanced collaboration among internal and external stakeholders. Web services—applications designed to support explicit interactions between Microsoft Dynamics NAV and Office SharePoint Server 2007—will provide easier access to information and documentation to help streamline tasks.

In addition, the automated workflow will help distribute information captured in Microsoft Dynamics NAV to other departments and line-of-business applications. Integrated instant messaging capabilities will enable real-time communication between stakeholders who are logged on to Office SharePoint Server 2007.

#### **Workflow Management**

Markant implemented the agilesTrade and agilesWorkflow tools to take full advantage of the supply chain status information provided through Microsoft Dynamics NAV. "The agilesTrade tool enables us to steer the system. We can determine how we want to set up the data and how often the data refreshes; we can also use it to import and export data," explains a project manager at Markant. As employees enter data into Microsoft Dynamics NAV, the agilesTrade tool validates the data against requirements set by Markant, ensuring stringent quality control across departments.

“The solution can scale as we grow. It can be customized to meet our needs as we change, and we can take it into other countries as our network of international trading partners expands.”

Project Manager, Markant Handels und Service

With the agilesWorkflow tool, Markant can better manage the complexities of the global business by recording and tracking prepayments, sales and purchase approvals, and other intricate transactions. The agilesWorkflow tool color-codes status information so that users can immediately identify when and where delays occur along the supply chain. The ability to extend Microsoft Dynamics NAV with the agilesTrade and agilesWorkflow tools presents Markant with a holistic picture of the logistics timeline.

#### **Automated Forms and Reports**

Integration between the Microsoft Office system and Microsoft Dynamics NAV enables Markant to automatically complete routine forms, reducing the effort involved and minimizing opportunities for error. The company plans to take advantage of XML style sheets to transfer form data from Microsoft Dynamics NAV to Microsoft Office Word and Microsoft Office Excel®. For example, templates created in Office Word and Office Excel will pull appropriate data from Microsoft Dynamics NAV or the AS/400 mainframe to generate sales orders, invoices, and reports. This ability to import and export data will make it easier for employees and stakeholders to edit and share documents.

#### **Benefits**

By combining the capabilities of Microsoft Dynamics NAV 5.0 and Office SharePoint Portal Server 2003, Markant delivers up-to-date, role-tailored information to stakeholders in its international supply chain. Markant business partners have access to real-time information on supply chain status and benefit from guaranteed quality assurance. This innovative system won agiles second-place recognition in the “Business Applications” category in *Computer Reseller News*, a well-known trade journal that publishes articles on technology news and trends. More importantly, the system has improved logistics and earned Markant a

competitive advantage in the global marketplace.

#### **Improve Supply Chain Visibility**

Markant increased efficiency and reduced errors integrating Microsoft Dynamics NAV 5.0 with line-of-business applications and exposing ERP information to remote users over the Internet. “The greatest benefits of the solution are supply chain workflow visibility and the transparency of the program,” states a project manager at Markant. “Customers need only sign in to the Web site to check status on orders and deliveries.”

Workflow tools enable supply chain managers to identify problem areas and address the problems before they begin to accumulate additional costs. “If quality control does not examine an order upon leaving China, we can see that right away and return the shipment before we get too far along in the supply chain,” says a project manager at Markant. “Exception management and reporting of transactions through instant tracking of the supply chain has reduced the data processing workload of business partners involved in the supply chain by 70 percent,” says Sega. Also, the workflow tools have prevented products from being shipped back and forth to make up for mistakes fueled by poor logistics.

#### **Guarantee Quick and Accurate Data Updates**

By making critical business information available online through Microsoft Dynamics NAV 5.0, Markant partners and customers can easily contribute changes and share documents. Editing documents also becomes quicker with the tight integration between Microsoft Dynamics NAV 5.0 and the Microsoft Office System. Markant is able to provide real-time insight into supply chain status and dramatically improve efficiency. Streamlined online communications have

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For more information about Markant Handels und Service products and services, call 49 (0) 781 6160 or visit the Web site at: [www.markant.de](http://www.markant.de)

For more information about agiles Informationssysteme products and services, call 49 40 30 95 33 0 or visit the Web site at: [www.agiles.de](http://www.agiles.de)

reduced the volume of calls among parties involved in the supply chain by approximately 25 percent. "Now we can handle more transactions with the same number of people," says a project manager at Markant

Microsoft Dynamics NAV 5.0 and SharePoint Portal Server 2003 have helped Markant decrease archival and retrieval times for purchase orders, shipping documents, and quality assurance reports by 30 percent. The company plans to improve these processes with the new integration functionalities that accompany Office SharePoint Server 2007.

### Provide a Platform for Growth

Microsoft Dynamics NAV 5.0, coupled with solutions from agiles Informationssysteme and other Microsoft technologies, provides Markant with a solid platform for growth. Markant now has the technology and the business knowledge to compete in new markets, develop a worldwide presence, and support the independent businesses that drive the trade industry. "The solution can scale as we grow," says a project manager at Markant. "It can be customized to meet our needs as we change, and we can take it into other countries as our network of international trading partners expands." By offering its business partners and customers a feature-rich channel for business communications, Markant can confidently expand into international markets.

## 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 5.0
- Microsoft Server Product Portfolio
  - Microsoft Office SharePoint Portal Server 2003
  - Microsoft Office SharePoint Server 2007
  - Microsoft SQL Server 2005

- Microsoft Office
  - Microsoft Office Excel
  - Microsoft Office Word

## Partners

- agiles Informationssysteme