



Make smarter decisions and accelerate growth

A fast-growing Washington State start-up chose Dynamics 365 Business Central to fine-tune its supply chain, improve service and boost sales.

Business in motion

With decades of experience in the metals, oil and gas, marine and forestry sectors, L. Craig Whited and the team at Fluid and Motion Control Technologies know what it takes to keep industry moving.

In particular, their expertise in fluid power devices – from hydraulic pumps to power units and motors, has seen Fluid and Motion put itself on the map as a supplier of industrial hydraulic equipment.

With a promising business on his hands, Craig realised he needed to put a platform in place to help take Fluid and Motion to the next level and gain all the benefits a modern enterprise resource planning (ERP) system can offer.

“I could have gone with QuickBooks, but I had experience with Dynamics 365 and felt I wanted something that would give me a better opportunity to scale the business,” says Craig.

“Being a start-up, I thought I might be able to do it myself, but quickly realised that I needed a professional to help walk me through this,”

Craig’s search led him to Intergen, the New Zealand company that has been working with US companies from its Seattle office since 2009.

Intergen recommended Microsoft Dynamics 365 Business Central, the comprehensive business management solution designed for small to medium-sized businesses.

Business Central lets businesses connect data across accounting, sales, purchasing, stock and customer transactions to run their operations efficiently.



Incorporating a streamlined sales ledger and accounts payable, it drives the financial heart of a business, also handling compliance, reporting, forecasting and visualisations with built-in Power BI dashboards.

With several thousand parts in its inventory, Fluid and Motion needed an ERP system to keep tabs on its growing supply chain, handle sales orders and invoicing and give Craig real-time updates on how the business was tracking.

“A number of players in the market were offering Business Central, but for a start-up the pricing didn’t make sense,” says Craig.

“Intergen came up with a solution that allowed us to get Business Central configured, to spend time with it and learn where the value lay.”

Part of that involved working with Intergen’s New Zealand-based Business Central expert, Andrew Sknar, who scoped the project and configured Business Central for Fluid and Motion’s needs, working with Craig in a series of Microsoft Teams video sessions.

“Andrew met with me virtually at times that worked for my schedule on the west coast,” says Craig.

The key components of Business Central fell into place quickly, but with Fluid and Motion selling to clients all over the US, configuring its e-commerce functions to accommodate the US tax system was a more involved process.

“There are 50 states to deal with and the sales tax, laws and exclusions are quite different state to state,” says Andrew. Intergen partnered with Avalara to ensure compliance with US Federal and State tax laws.

The advantages of using Business Central became quickly apparent to Craig when he logged into Role Center, the visual dashboard that gives him an overview of the key information and metrics underpinning his business.

The Dimensions feature of Business Central also allows him to perform analysis on documents, such as sales orders.

"It gives you a macro view of what is going on, where are we selling things, who is buying them and where they are," says Craig.

Other features such as PayPal integration to allow customers to make credit card payments and easy importing of inventory updates from Excel have made life much easier for Craig and the team.

"It's simple to keep track of what customers owe us, what sales we've made, overdue purchase invoices," says Craig.

"These things that are impactful for making the business go further faster. That's a big deal for us."

Fluid and Motion would likely take advantage of the advanced resource planning tools available in Business Central as the company grew and Craig looked forward to leveraging Microsoft's Power BI platform to visualise his company's data.

For Andrew, the partnership with Fluid and Motion demonstrates Intergen's capability to look beyond the technology to the specific business needs of the client.

"We are not just IT people. We have solid knowledge in accounting and finance. We understand taxation in multiple jurisdictions," he says.

"We did the project on time, on budget and to scope. We have a very happy client."

For more information contact us today:

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"It's more than Intergen's knowledge of Dynamics 365 Business Central. It is the in-depth understanding of business processes that we can leverage to make our business run smoother. When things come up, Intergen gets our first call. We have all the confidence in the world in them."

L. Craig Whited

Founder, Fluid and Motion Control Technologies

SNAPSHOT

- Washington State start-up Fluid and Motion chose Dynamics 365 Business Central to streamline its processes, from quotes and sales orders to processing online payments.
- Intergen implemented Business Central in just two weeks, with the whole project, from first consultation to business as usual, taking less than three months.
- Fluid and Motion is now managing customer orders and thousands of products in its inventory through the intuitive Business Central user interface.
- Business Central is fully scalable so that Fluid and Motion can utilise its extensive features as the company grows and diversifies.
- With Fluid and Motion taking advantage of regular Business Central software updates, it gets the best from a cloud-based service that keeps up with the pace of changing technology.