

# Strategic Solutions NW

Implementation of Microsoft Dynamics AX with Advanced Contract Management



Cradlepoint streamlines financial and operational processes by implementing Microsoft Dynamics AX with Advanced Contract Management for services revenue recognition that seamlessly integrates with Salesforce for opportunity management



## Background

Cradlepoint develops connectivity solutions that help their distributed and mobile customers provide secure communication over 4G LTE, SD-WAN and the Cloud. Additionally, Cradlepoint offers multiple tiers of support to keep their customer's network secure, problem-free and operationally efficient.

Cradlepoint was using an ERP system that was no longer meeting their business need to be flexible and adaptable to a rapidly changing business environment. The old ERP was focused on manufacturing and traditional product sales and not able to handle service revenue accounting and new ASC 606 requirements. The system was not a solid foundation for a rapidly growing company and the many manual process to account for services revenue and integration with SalesForce.com led to inaccurate master data and inefficiencies entering, tracking and reconciling data between various software and spreadsheet based systems.

## Project Description

Cradlepoint retained Strategic Solutions NW to implement Microsoft Dynamics AX 2012 along with integrated Advanced Contract Management (ACM) module and integration to SalesForce.com. SSNW focus areas included:

- Designing, configuring and customizing Dynamics AX to best meet Cradlepoint business objectives.
- Developing deep skills in ACM module and filling functionality and performance gaps through customization and collaboration with the third party software provider.
- Developing Product, Box and Carton 1D and 2D barcode labels to eliminate manual integration to BarTender.
- Implementing Advanced Warehouse Management processes using mobile technology to receive inbound inventory, pick for production and shipping.
- Developing interface integration architecture and implementing integration best practices to reduce dual entry between the ERP system and SalesForce.
- Supporting 3rd party products installation and integration for Web Based ordering and EDI.

## Business Benefits from Dynamics AX

By implementing and Dynamics AX, ACM and integrating to Salesforce, Cradlepoint found immediate benefits in finance and operations. Some of the highlights included:

- Seamless integration between ACM, AX and Salesforce allows customer services renewal quotes to be generated and distributed to the customer much more efficiently. Additionally, customers are able to view and accept services renewal quotes using the Web Commerce solution.
- Services revenue forecasts and posted revenue are built into AX through the ACM module providing a single system that supports product and services revenue and financial reporting.
- Inventory is now managed throughout the system at the serial number level providing better visibility to onsite and intransit inventory as well as a clearer audit trail for return and warranty transactions.
- Demand Forecasts and Master Planning have eliminated manual purchase and production planning work in those areas.

Overall, Cradlepoint now has a solid and flexible foundation for future growth with the ERP system supporting a dynamic business model.

## About Strategic Solutions NW

Strategic Solutions NW is a technology and management consultancy with many years of experience exploring and applying technology solutions to improve business functionality. We encourage you to browse our site, and invite you to contact us to discuss how we may help your business realize its full potential.

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