



Chef'n Customer Solution Case Study



CHEF'N

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Organization Size:
25 employees

Software and Services:
Microsoft Dynamics® NAV

Industry:
Wholesale Distribution

Country/Region:
United States

Business Need:
Inventory Insight
Order Control
Streamlined Business Processes

Issue:
Accounting Software Management
Electronic Data Interchange (EDI) Planning

Microsoft Partner:
Gilbert & Associates

SITUATION

Chef'n is a leading wholesale distributor of unique kitchen tools and appliances based out of Seattle, WA. They have been in business for 28 years selling products domestically to a broad distributor network, including Bed Bath & Beyond, Target, Williams-Sonoma®, and many more.

In 2008 Chef'n was quickly outgrowing their Sage Accpac product. Inaccurate data pulls within their accounting system were resulting in skewed insight into their financial position, and Accpac was not as user friendly as they would have liked. Chef'n had experienced many upgrades with Accpac, and it was a difficult process to get their employees up to speed each time. They needed a system that would allow them to focus on the needs of their customers. Chef'n needed to streamline processes to ensure timely and accurate reporting of inventory, orders, and tracking information for their customer's overall satisfaction and Accpac just wasn't cutting it.

SOLUTION

Gilbert & Associates had worked with Chef'n for over 6 years modifying Accpac to adapt to their specific industry requirements. When Chef'n reached a dead end in 2008, they trusted Gilbert & Associates to make a recommendation on alternative financial and supply chain solutions. Gilbert & Associates already had deep insight into Chef'n's needs and the pains they were experiencing. After additional business assessment work, they recommended Microsoft Dynamics NAV. Erik Engelstad, CFO of Chef'n says, "Gilbert & Associates really reviewed our processes in-depth to determine the best solution for our company." Gilbert & Associates offered expertise in Microsoft Dynamics NAV and knew the vertical and horizontal add-ons available for the solution would ensure the client's needs would be met without extensive modifications, allowing them full

access to the many features Microsoft Dynamics NAV has to offer.

Chef'n considered other Microsoft Dynamics products and even another upgrade of their Accpac solution, but ultimately chose Microsoft Dynamics NAV because of the advanced functionality it could provide. They also saw themselves using Microsoft SharePoint® in the near future and knew Microsoft Dynamics NAV would integrate well with this. Chef'n was happy to continue their close partnership with Gilbert & Associates in the Microsoft Dynamics NAV implementation and was confident in their decision to move forward.

The implementation took about 3-5 months to deploy and complete. Gilbert & Associates worked closely with Chef'n on planning, training, converting their old data into their new system, testing, and customizing it to fit their operational needs. "Gilbert & Associates has great knowledge of EDI and what our company needs to meet our industry requirements. Because of their expertise, our implementation and deployment was a positive experience," said Erik Engelstad, CFO of Chef'n. By late 2009, Chef'n had insight into the reports they actually needed, better control over their EDI and more accurate accounting data. Microsoft Dynamics NAV gave Chef'n the power to be more productive internally and to be more customer-focused. The advanced features and the customization capabilities of Microsoft Dynamics NAV now simplifies Chef'n's day-to-day operations, reporting and analytics, while supporting entities outside their organization.

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Erik Engelstad, CFO of Chef'n



BENEFITS

Advanced Reporting Capabilities:

After meetings with Gilbert & Associates, Chef'n realized they needed better reporting in order to enhance their business. Gilbert & Associates suggested Chef'n add Jet Reports, a Microsoft Dynamics NAV ISV Add-On, sold by Jet Reports in Portland, OR, that automatically integrates with Microsoft Dynamics NAV through Microsoft Excel®. With Jet Reports, Chef'n can simply type in formulas and pull out the information they need, as well as create auto reports to be emailed to users at certain times each day. The combination of Microsoft Dynamics NAV and Jet Reports gave Chef'n full insight into their inventory, customer orders, and shipping information.



Jet Reports has helped Chef'n send proactive communications to distributors and customers with past due or open invoice information. They can easily check errors within customer and item information, orders, or variances versus budgets by running audit reports. One report compares their orders and shipments to their real time budget, ensuring they have adequate inventory levels at all times.

This type of functionality has given Chef'n employees more insight into the business processes, resulting in less manual error. Marc Matsumura, Accounting Manager of Chef'n says "The automated piece within Microsoft Dynamics NAV and Jet Reports has saved us about 6 to 12 hours of work a month on reporting and analytics and there's still so much more this tool can do".

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Better Control of EDI

Microsoft Dynamics NAV has also given Chef'n better control of their Electronic Data Interchange (EDI). Chef'n used to hire a consulting company every time they needed an EDI map set up because Accpac didn't have a module that made it possible to write code for their documentation.

Microsoft Dynamics NAV has an add-on module that allows in house employees to easily write this code and saves them \$1500 per set up. On a yearly basis, Chef'n usually completes around 5-6 set ups, saving them over \$8,000 annually.

Accurate Customer Data

As with any business, customers are the core to success and keeping them happy ensures the longevity of a company. Chef'n realized they needed deeper insight into their customer activity so they could sustain and enhance those customer relationships.

Chef'n uses a product called Brandwise that allows their sales representatives to view and enter customer orders online. Gilbert & Associates created a customized order import module that works within Brandwise. Chef'n sales reps can write and update customer orders on a handheld device or their laptop computers within Brandwise and a text file is then created that seamlessly imports into Microsoft Dynamics NAV. The import syncs up all order information avoiding manual error and improving order visibility throughout the company.



This order import tool saves Chef'n at least 3 hours a week, which is 12 hours a month and finally, 144 hours a year. If you figure one of their employees is paid \$25/hour, this means an initial savings of almost \$4,000 a year. In addition to the cost savings, the import also helps ensure customer orders are entered on a timely basis resulting in happier customers and a much more relaxed work environment.

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SUMMARY

Chef'n's trusted technology partner, Gilbert & Associates, came to the rescue when Chef'n was struggling with a lack of reporting, timely order entry, and insightful inventory control. Microsoft Dynamics NAV proved to be scalable and customizable for Chef'n needs, allowing them to expand their customer service and increase revenues. Chef'n is saving time and money with the Microsoft Dynamics NAV solution and the industry specific modules. Microsoft Dynamics NAV has contributed to a total savings of about \$15,000 a year while enhancing their overall business processes.

Gilbert & Associates' expertise in Chef'n's business and industry requirements has helped pave the way for an integrated and seamless solution that works perfectly for Chef'n and the business goals they can now achieve.

