Enterprise Resource Planning (ERP) & Inventory Management Transformation

Strategy & Objectives

- Implement a reliable, more scalable solution with rapid deployment than the current QuickBooks, Expandable system, ERP roll-outs.

- System should auto validate transactions like sales orders based on business validation rules and auto process return orders.

- Custom Approval Routing process for SO, PO

- Reporting and consolidation across Subsidiaries & locations used to be a challenge and often had several manual interventions.

Solutions

- Implementation of Netsuite modules (Order to Cash, Procure to Pay, Basic Manufacturing)

- All 3rd party systems like Coupa, SFDC, SPS Commerce etc. have been integrated with Netsuite using Mule soft.

- Data migration utilities from Expandable to Netsuite

- Multi-book accounting system Facilitating inter-company transactions

Enablers

- End-to-end capabilities in ERP

- Middle ware was introduced to take care of all integration aspects.

- Streamlined tracking process

- Real time reports to identify shipments, delays, Station Activations and Assembly of Items

- NetSuite integrations have resolved the productivity issues of client, which proves to be highly beneficial for the organization

Success Story

For a Leading electric vehicle’s hardware/software Manufacturer

Digital Capital Delivered

Consolidated and monitored international subsidiary locations and facilitated multi-currency transactions

Greater Visibility and control over Sales process & Finance reporting.

Effortlessly managed international subsidiary finances

Improvement in visibility and Sarbanes-Oxley (SOX) Act compliance

Billing and tracking transparency of sales process
Success Story

Enterprise Resource Planning (ERP) & Inventory Management Transformation

Strategy & Objectives

- **Strong inventory management** and core operational modules
- **Data migration** from expensive Baan ERP solution to NetSuite
- **Salesforce** integration with NetSuite
- Integration of payment with the third-party application
- Tracking of shipping and billing process
- Seamless integration with current design and production system
- Happiest Minds customized solution for implementing Goods and Services Tax (GST)/Tax Deducted at Source (TDS)

Solutions

- Implementation of NetSuite One World
- Existing BAAN accounts are mapped to NetSuite cloud ERP solution
- Salesforce integration with NetSuite
- Configuration of GST along with harmonized sales tax (HTS)/services accounting code (SAC) at the item level
- Integration of third-party payment gateway (Bellin)
- Seamless billing and payment process
- Multi-book accounting system Facilitating inter-company transactions

Enablers

- End-to-end capabilities in ERP
- A well-defined migration strategy without any user disruption
- Multi-subscription and multi-currency management
- All financials in NetSuite rolled-up to the parent company
- Data consistency across multiple systems

Digital Capital Delivered

Consolidated and monitored international subsidiary locations and facilitated **multi-currency** transactions

Salespeople received exact details as customer relationship management (CRM) and ERP was integrated

**Payment process integration** enabled better visibility of payment processing

**Streamlined order management**, including shipping

Effortlessly managed international subsidiary finances

Facilitated financial reporting and tax compliance in local currencies, including GST

Success Story

Digital Capital Delivered

Consolidated and monitored international subsidiary locations and facilitated **multi-currency** transactions

Salespeople received exact details as customer relationship management (CRM) and ERP was integrated

**Payment process integration** enabled better visibility of payment processing

**Streamlined order management**, including shipping

Effortlessly managed international subsidiary finances

Facilitated financial reporting and tax compliance in local currencies, including GST
**Operation & Inventory Management**

**Strategy & Objectives**
- Automating workflow processes for lead management, application conversion, and contract update and storage
- Regular updates/notifications for sales orders to customers/vendors based on order placing, fulfillment, and invoicing
- Order shipping notification for fulfilled order
- Multi-carrier tracking information

**Solutions**
- NetSuite’s online customer forms to create leads and convert them into customers/partners/vendors
- Mulesoft as middleware for interacting with the user interface (UI) and NetSuite
- Pacejet shipping and RF-SMART fulfillment process integration with NetSuite
- Narvar’s multi-carrier tracking integration with NetSuite to place and track the fulfilled orders

**Enablers**
- Online catalog request, order creation, and billing process
- NSPOS Integration
- Enhanced user interface
- Streamlined tracking process
- Transparent pre-purchase and post-purchase experiences

**Digital Capital Delivered**
- Easy management and notification processes resulted in customer/vendor satisfaction
- Reduced the number of customer care contacts resulting in an increased focus on proactive selling/design advice
- Simultaneous notification systems for different stakeholders (sales representative, customer relations and vendors)
- High fulfillment of sales orders
- Billing and tracking transparency of sales process

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**Success Story**

For a Leading Luxurious furniture product seller
Enterprise Resource Planning (ERP) & Inventory Management Transformation

Strategy & Objectives

• Implement a reliable, more scalable solution with rapid deployment than the current ERP system
• Consolidate across subsidiaries, while managing 10,000+ customers
• Integrate Electronic Data Exchange (EDI) system with Netsuite application
• Migrate data to NetSuite for a standard process to be followed in the sales team across multiple regions (USA, EMEA, and APAC)
• Seamless reporting and consolidation across subsidiaries/sales Region/locations
• Create a pricing solution based on subsidiary/location/region

Solutions

• Implementation of core operational modules in NetSuite
• Integration of EDI systems with NetSuite using MuleSoft
• Seamless data migration from Baan to NetSuite
• Logical inventory solution for faster shipping and deliveries
• Instant inventory updates to facilitate quick ordering/shipment processes
• Customized solution to suggest prices based on subsidiary/location/region

Enablers

• Core modules for all back-end business processes such as accounts receivables, accounts payable, invoicing, bills’ reconciliation, accounting, and financial reporting
• Seamless data migration from multiple legacy systems into NetSuite to provide historical records
• NetSuite customization capabilities enabled the system to suggest pricing based on subsidiary/regions/locations and facilitated corporate advantage
• Logical solution enabled the company to maintain inventory, ship assemblies quickly
• Middleware (MuleSoft) was introduced to take care of all integration aspects

Success Story

For an information and communication solutions provider

Digital Capital Delivered

Real-time consolidation across three subsidiaries

Built-in support for over 10 currencies, 10+ payment formats, 20+ languages, and financial consolidation

End-to-End process visibility across multiple subsidiaries/departments/locations, in conjunction with analytics deployment

Greater visibility and control over sales process and pricing

Managed EDI mapping and signals across NetSuite
**Scalable Solution & End-to-End Capabilities**

**Strategy & Objectives**
- Scalable single system to cater to current and future needs with customization capabilities for modeling software to client’s business needs
- Seamless and consistent data across systems
- Tracking of customer relationship management (CRM) activities, covering aspects such as campaign management, lead, prospect, opportunity, and quote to order
- Tracking of customer contract, billing schedule, and projects accounting seamlessly

**Solutions**
- Oracle NetSuite offered a unified platform for end-to-end visibility across the business
- Happiest Minds implemented an end-to-end Enterprise Resource Planning (ERP) solution in record time for business functionalities, including CRM, order management, procurement, inventory and financials
- Creation of multiple fiscal calendars for multiple subsidiaries
- Creation of multiple key performance indicators (KPIs) and dashboards to gauge performance over time

**Enablers**
- End-to-end capabilities in ERP
- Web-based agency details along with their commissions were integrated with accounting, inventory and other key business processes
- Data consistency across multiple systems
- KPIs provided a broader view of business performance and helped make informed decisions

**For a Global Manufacturer of Industrial Lighting Solutions**

**Digital Capital Delivered**

Business operations streamlined onto NetSuite’s unified platform, integrating CRM, ERP and Ecommerce processes

Oracle NetSuite’s modern Cloud solution aligned well with client’s focus on IT innovation and modernization

Easy customization allowed the client to shape NetSuite to best fit their needs

Automatic shipments and automatic fulfillments replaced manual entry with scripting

NetSuite, MuleSoft and Okta to develop single sign-on (SSO) for the partner to create quotes and orders

Improvement in visibility and Sarbanes-Oxley (SOX) Act compliance
Lead, Order and Billing Cycle Management

Strategy & Objectives

- Online automated workflow process for lead management, application conversion, and contract update as well as storage
- Online order creation and billing process
- Regular updates/notifications for sales orders to partners/customers based on order placing, fulfillment, and invoicing

Solutions

- NetSuite’s online customer forms for creating leads and converting them into partners/customers
- MuleSoft as middleware for interacting with user interface (UI) and NetSuite
- NetSuite, MuleSoft, and Okta to develop single sign-on (SSO) for the partner to create quotes and orders
- Magento and NetSuite to place, track and bill sales orders
- VOIP(8by8) for cloud based voice and unified communications for businesses

Enablers

- DocuSign for transaction management services (contracts)
- Enhanced user interface
- Automated partner onboarding
- Automated workflow process

Success Story

For a Leading Solar Home Solutions Provider

Digital Capital Delivered

Smooth, automated partner onboarding process resulted in over 1000 partners onboarding

High fulfillment of sales orders, as well as their billing and tracking

Organized maintenance of contract documents (contracts)

Simultaneous notification systems for different stakeholders (sales representative, customer relations and partners)
## Enterprise Resource Planning (ERP) & Inventory Management Transformation

### Strategy & Objectives
- Scalable approach to resolve inventory and Finance on demand transactions
- Maintenance of User credentials and system administration for roles and permission and email alerts
- Reporting and consolidation across Subsidiaries & locations
- Automating Approval workflow, Order Fulfillment and Cash sales
- Streamline messages/script exchanges across multiple application

### Solutions
- Configure custom field and records
- **Configure user roles** and permission set up and training.
- Save Search and reports for AP, AR and Procurement
- **Month End Activities** and support for fallouts if any
- **Inventory transaction and reconciliation** between Warehouse and NetSuite

### Enablers
- Compliance for user access management
- Inventory transactions and reconciliation b/w multiple application
- Automated **Bank Reconciliation** reporting across applications
- Real time reports to identify fallouts of missing SO, Cash Sales and Fulfillments
- **UAT testing** streamlined with other cloud applications for upgrades
- Automated **SuiteFlow Approval**

### Digital Capital Delivered
- Better User Roles and Permission management
- Greater Visibility and control over Transactional issue via report Management.
- Consolidation of Subsidiaries-Finance & inventory transaction across locations
- Automated Bank Recon, Inventory Count saves more time and effort

**Success Story**

For a Largest E-commerce Merchandiser of consumer electronics and gaming

**Support and Maintenance for Inventory, Order Management and Role Management**
Happiest People · Happiest Customers

For any business-related queries please contact us at business@happiestminds.com

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