

An Environmental Equipment Manufacturer Streamlining **Order Management** by **Migrating from Microsoft Access** to D365 F&O Case Management



About the Company

A U.S.-based global manufacturer of industrial air, water, and energy-transition solutions, protecting people, assets, and the environment across multiple industries.


Industry

Equipment
Manufacturing
(Environmental
Protection
Solutions)

**Workforce
Confidential
Presence
Global**

Service


 D365 F&O Case
Management
Implementation

 Role-Based Access
& Audit Trails

 Sales-Order-
Linked Cases

 Workflow
Automation

 Power BI
Reporting

 Document & Notes
Management

 Power Automate
Notifications

Solution

Access → D365 Case Management

Replaced manual Access workflows with D365 Case Management; cases auto-created and linked from Sales Orders with a standardized sequence (DOA Approval → Applications → Engineering → Production Routing → Purchasing → Planning → CSR).

01

Workflow Automation & Tracking

Added workflow logs, user notes, forward/backward routing, and auto-status changes (e.g., Delivered → Shipped, Invoiced → Closed) to reduce manual follow-ups.

02

Business Data & Validations

Introduced custom fields (Brand, Market Type, Customer PO #/Amount, Expedite, Customer-Supplied Material) plus controls to prevent duplicate POs and multiple cases per Sales Order.

03

Operational Workspaces & Reporting

Built department/brand workspaces with tiles (Open, WIP, Shipped, Closed) and cycle-time measurement for each stage; stood up a Power BI workspace for SLA, queue-time, and KPI visibility.

04

Centralized Documents & Notes

Enabled drag-and-drop attachments (Excel, PDF, Outlook items, etc.) and a consolidated case-notes view to replace scattered OneDrive files and email trails.

05

Governance & Scale

Implemented role-based access, audit logging, and performance-tuned views to support high order volumes and future phases (e.g., ECN).

06

Results and Outcomes

- 30% fewer order errors via auto case referencing and duplicate-PO validation.
- 100% reduction in manual effort for order completion through auto case closure tied to Sales Order status.
- 30% faster order-to-case cycle; 15–20 minutes saved per order with drag-and-drop docs.
- 70% faster reporting by replacing Excel with Power BI workflow dashboards.
- 40% less rework using differentiated OE vs. AM workflows.
- Real-time visibility (Open/WIP/Shipped/Closed) improved accountability and on-time execution.
- Standardized, auditable process boosted cross-department collaboration and future scalability.