SOFTENGINE SAP BUSINESS ONE CUSTOMER SUCCESS STORY

Franklin Valve

SAP and Softengine Transform Inventory Tracking Processes.

Franklin Valve Management and Shop Floor Staff Rejoice!

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> Brittani Collins, Warehouse/IC Manager

Established in 2003, Houston, Texas-based Franklin Valve (www.franklinvalve.com) is a privately held company that has become an industry leader with its design and manufacture of the DuraSeal Double Block and Bleed Plug (DBB) valve. The company's products are distributed worldwide and their customers include high-profile companies such as Chevron HI, BP, Ecopetrol, Magellan, Kinder Morgan, Pertomina, CITGO, Transmontaigne and Plaines, among others. From 2009-2012, Franklin Valve experienced over 900% growth and in 2014, the company moved into a state-of-the-art 65,000-square-foot facility, which also houses its in-house R&D department.

COMPANY PROFILE

Name: Franklin Valve

Location: Houston, Texas

Industry: Oil and Gas

Products: Valve Manufacturing

Website: www.franklinvalve.com

System: SAP Business One ERP – Softengine WMSm (Warehouse Management System mobile)

Challenge

Hunting for the Elusive Part

Franklin Valve's business had been experiencing tremendous growth and as the company had outgrown its existing facility, a decision was made to move to a much larger space. However, in order to make the move a success, a major hurdle had to be overcome. Shop floor personnel had been relying on manual processes to locate a dizzying number of parts and now they were going to be responsible for a 60% increase in pallet locations in the new facility.

Without any visibility in a warehouse brimming with thousands of bins, it was extremely time-consuming and labor-intensive to find and count parts. In fact, with up to 30 unique parts required for a typical valve assembly, it sometimes took up to an hour just to pick all the parts for that one valve.

Solution

Inventory Tracking at Warp Speed

Franklin Valve's Warehouse/IC Manager, Brittani Collins, needed a faster, more reliable system to more effectively manage the expanding inventory and growing number of bin locations at the new facility. "Our most pressing objective was to find a solution that would help us instantly locate and track our most precious assets – our inventory," said Collins. "Our new warehouse has thousands of bin locations and we couldn't afford to waste time hunting around for every single part."

Franklin Valve selected **SAP Business One**, which offers comprehensive ERP functionality, covering purchasing, planning, production, inventory management and sales support. The company reached out to SAP Gold Partner, **Softengine** (www.softengineusa.com), to perform the implementation and to integrate its **WMSm** (**Warehouse Management System mobile**) extension to deliver real-time inventory management in the company's vast new warehouse. While SAP Business One transparently integrates inventory and accounting transactions, inventory transfers, picking and packing, WMSm provides an additional layer of functionality. Using a barcode scanner, shop floor staff can always see what they have in all of their bin locations and effectively conduct on-the-spot transfers and cycle counts of components.

SAP Business One offers a host of features that Collins and her staff have found invaluable in making their work so much more efficient and accurate. Here are a few key features:

- **Drag & Relate** enables SAP Business One users to generate customized reports that contain information not usually available in a standard report format. For example, you can go to the "Item Master Data" screen, click on an "Item No." and drag it over to the "Purchase Order" option in the Drag & Relate tab to view a complete history of all purchase orders associated with that Item No. "This feature has made searching for information related to purchasing, items, customers and vendors so much quicker," said Collins. "We use Drag & Relate for nearly every aspect of our business and I can't even imagine not having it."

- **Relationship Map** is a simple and clear visualization tool that displays the relationship between an original document and all subsequent documents in the chain. This feature is available across a wide variety of business areas, including Sales, Purchasing, Inventory, Production, Banking and Service. Franklin Valve makes frequent use of the visualization of Item Master Data and all related bills of materials (BOMs). "This feature sure has made upper management very happy," said Collins. "Within seconds, we can see an exploded view of a part number and its relationship to all the associated bills of materials. Plus, it can be used with invoices, delivery tickets, purchase orders ...you name it!"

- **Gross Profit Calculation** is another feature that staff finds very useful. When they create a sales order and enter an "Item No." with its associated sales price, the system automatically calculates the gross profit for that item, which can then be checked against the intended margin to ensure accuracy before finalizing the invoice. This feature is available for a wide range of documents, including sales quotations, sales orders, delivery returns and numerous A/R-related documents.

- **The Query Manager** is a great customizable reporting tool that enables Franklin personnel to monitor minimum and maximum quantities of inventory to ensure that optimal levels are maintained. "We wanted a report that shows the inventory levels whenever we fall below our acceptable minimum, so SAP wrote the script and devised this query for us," said Collins. "It's always

helpful to know if we're short on a particular item. I also use this feature to find out what part numbers exist that do not reflect a cost in our warehouse or to see all of our open orders at any given time."

• SAP Business One's built-in **Label Printing** feature has been a tremendous cost- and time-saver. "The ability to print out a barcode for any bin location has likely saved us thousands of dollars, considering the number of bin locations we have on-site," noted Collins. "Plus, any time an auditor visits, I love printing out the bin location contents list, which provides a very nice, professional layout that exponentially reduces our counting time!"

Results

SAP Business One and Softengine are Simply Bintastic!

The one-two combination of SAP Business One ERP and Softengine's WMSm warehouse management solutions has dramatically reduced the time it takes to track down bins and parts. SAP Business One's scalability ensures that no matter how many more bins and parts find their way into the warehouse, the system will easily keep pace with growth. The sales and purchasing teams can get an up-to-the-moment picture of inventory at any given time, and drive sales or plan production accordingly. From receiving goods to shipping finished products, every phase of the process is efficient and reliable. From a financial standpoint, real-time inventory management enables more accurate cash flow forecasting and minimizes capital tied up in inventory.

Softengine's WMSm mobile extension has certainly made Brittani Collins and her shop floor personnel very happy. "WMSm enables us to transfer components instantly and accurately," said Collins. "Using mobile scanning devices ensures that our cycle counts are quick and error-free and that a single person has the ability to conduct a full physical inventory with the "Inventory Count" feature. This system empowers my staff to be active,

independent and confident in their ability to successfully manage all of the bin locations year-round."

Collins is no less enthusiastic in her praise of Softengine's commitment to the success of the implementation. "Softengine was simply fantastic," claimed Collins. "We're a small company and this project was a major undertaking for us. We really needed help from start to finish and our primary contact at Softengine did everything he could to make the process as painless as possible. On several occasions, the project manager flew down to provide on-site guidance and he was always quick to respond to any questions or concerns we had. Whenever we contacted Softengine about any technical issues, their support team got back to us within minutes to tell us they were working on it and soon thereafter we would receive notification that the issue had been successfully resolved. Now that's a partner!"

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