

Delta Phoenix and Exact



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# THE SEARCH FOR A MODERN, SCALABLE ERP SYSTEM



Delta Phoenix, Inc. is an American company and owner of the brand Wysong, which maintains an excellent reputation in the machine tool industry. Beyond offering parts and services for legendary Wysong press brakes and shears, they also perform expert contract manufacturing, machining, and engineering for business partners. Delta Phoenix is an ISO 9001: 2008 registered company. With extensive assembly, fulfillment, and logistic networks, companies large and small appreciate the quality workmanship and speedy delivery that Delta Phoenix offers.

## Business Issues & Challenges

Technology is a constantly evolving industry, which means manufacturing businesses are under constant pressure to evolve their systems to keep up with both the growth of their organization and changing trends in their market. Delta Phoenix was no exception and found themselves needing a flexible ERP system that could help them manage the growing contract manufacturing side of their business and support their part sales and service for existing Wysong machines that are still in use by their long time customers [a large part of their business].

Delta Phoenix's legacy manufacturing system was a highly customized mainframe. The system was set up in such a complex manner that when new leadership entered the scene, they immediately realized that both the processes and technology were outdated. With this realization, Scott McBride, Delta Phoenix's Director of IT,

commenced a project to evaluate a new ERP system.

After an initial evaluation, Delta Phoenix began working with a software provider who suggested that the company begin using an express version of their software. The vendor proposed the express version as a stepping stone—with the goal that Delta Phoenix would ultimately upgrade to the full software package when ready. Given that the full version was out of budgetary range, the express version seemingly was the best fit.

After some time using the express software, Delta Phoenix ultimately noticed that their new system and their legacy mainframe weren't communicating. They attempted to map an integration of the two, but after numerous failed attempts, they began to run the two systems independently.

In addition to their frustrations at using two systems, Material Resource



Planning (MRP) was painfully absent in the express package they were using for contract manufacturing. Delta Phoenix's customized mainframe software did have MRP, but they knew that they needed a system that could support both sides of their business and perform MRP across both contract manufacturing and parts sales at the same time. Not having that integration between the two sides was adding hours of time to IT support and purchasing. Having used MRP in their mainframe, Delta Phoenix recognized how strong of a tool it was, which led to powerful MRP abilities becoming a core requirement for any software package they intended to use to integrate the two sides of their business.

After contacting the software provider and detailing out these business challenges, they were told that in order to come up-to-speed with these requirements, they would need to upgrade to the premiere software package, which was definitely out of question for Delta Phoenix in terms of budget.

#### **Business Solution Approach**

Having been in the technology space for years and armed with the knowledge of software packages in the market, McBride began to evaluate his options. Delta Phoenix re-opened the search for a new ERP software package. Previously having reviewed a sister product of Exact MAX, they reached back out to Exact to set up a product demonstration.

After fully considering a number of vendors and ERP offerings, Exact MAX prevailed as victor of the selection process for a few reasons:

**Scalability** - Delta Phoenix's team appreciated the fact that Exact MAX is extremely scalable. They were able to select the modules they needed for the jump-start and were able to set some goals for phase two of their implementation. There was no need to upgrade from an "express version," and they were able to fully understand what was available to them when they felt the time was right.

**Impressive Product Demonstration** - The Exact MAX team tailored a specific product demonstration using Delta Phoenix's data set. This showed them exactly how their data would transact through the system. The demonstration was detailed and highlighted the specific solution offering.

**Budget** - The Exact MAX suite offered them a scalable and reasonably priced ERP system within their budget. They were able to negotiate an amicable agreement and get the ball rolling quickly.

McBride and Delta Phoenix were pleased to now have a product that met each of their business needs. No longer would they have to operate in segregated systems or rely on their legacy mainframe for MRP.

"Now that Exact MAX will offer an MRP solution for our team," said McBride, "we

#### **BENEFITS**

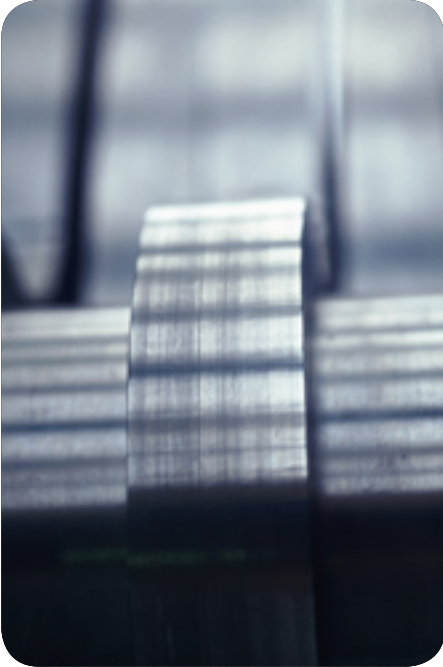
- Cost savings thanks to scalable ERP modules that allow for a phased implementation approach
- Ability to operate using one, centralized system and eliminate redundant processes
- Quick data migration tool to reduce implementation time
- Experienced consulting and support team



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- Scott McBride, Director of IT, Delta Phoenix





won't have to go through and train each member on how to manually run MRP on our previously customized system. The learning curve will be less steep."

#### **Solution Execution: Preparation for Implementation**

Once preparations began for Delta Phoenix's implementation of Exact MAX, McBride knew immediately that he would need to arrange for the company's existing data to transfer into the Exact MAX system. Initially, it was a tedious manual process. The data required massaging and the process wasn't as robust as it could be.

Exact MAX consultants then visited Delta Phoenix on site to see if they could troubleshoot the issue and offer a more efficient method of getting the company's data transferred over to Exact MAX. The consultants suggested an Exact MAX add-on tool called Quick Data Loader (QDL). The QDL tool uses default fields and helps massage existing data to make imports very clean when loaded into Exact MAX.

Delta Phoenix took the consultants' advice and used QDL to migrate copious amounts of historical data (some dating as early as forty years old) over to their new system. They migrated approximately 30,000 customer records as well as nearly 80,000 part records in a relatively short time. The Delta Phoenix team was thrilled with how the QDL streamlined the data migration process. In the end, the overall process took about one third of the time it would have taken without the QDL tool.

The Exact MAX consultants also worked with Susanne Hall, Executive VP of Delta Phoenix, in migrating the company's entire financial recordkeeping from the customized software used in the mainframe to the integration with Microsoft Dynamics GP software. "Exact

MAX listened closely to the needs of Delta Phoenix and provided excellent guidance and support to Susanne and her financial team during that migration," noted McBride, "and they continue to support Delta Phoenix in modernizing our financial recordkeeping."

Before long, Delta Phoenix was up-and-running with Exact MAX. "In addition to the consultants that aided in the implementation on site," said McBride, "the Exact MAX team as a whole has been very helpful during the entire process." Communication is key in a team project like this one, and the synergy between Delta Phoenix and Exact MAX could not be beat.

More information about Delta Phoenix and the Wysong brand can be found at [www.wysongpartsandservice.com](http://www.wysongpartsandservice.com).

#### **About Exact MAX**

With decades of experience serving entrepreneurs, Exact understands the issues that manufacturing companies face when running their business. Exact MAX helps growing manufacturers control their resources with an easy-to-use solution that reduces the cost of manufacturing, automates manufacturing compliance, and improves profitability all while enhancing customer service and satisfaction.

Through seamless integration with Microsoft Dynamics GP and Intuit QuickBooks, Exact MAX offers the power of integrated ERP and boasts a particularly strong footprint with manufacturers that must maintain compliance with government or industry regulations, manage recalls and control and document product revisions and engineering changes.

**For more information about the products and services that Exact offers, please contact us at 1.855.392.2862 or visit us online at [max.exactamerica.com](http://max.exactamerica.com).**