



CLIENT SOLUTION CASE STUDY

# Cannabis Edibles Company Devours Business Challenges with Complete ERP Solution

MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

## A Booming Business

During the second quarter of 2020, overall edibles sales hit an all-time high of \$227 million. Booming growth meant that a top cannabis edibles organization outgrew its “ERP Lite” solution built on QuickBooks and Google Sheets. It was a big goal for the organization to reduce dependency on the limited, siloed products and move to a true ERP system to ensure data accuracy and security.

The organization partnered with Microsoft partner Velosio to find an ERP solution to replace its disconnected, incomplete applications robbing the organization of the visibility needed to sustain growth, expansion, and profitability. QuickBooks was not scaling to provide the comprehensive functionality that the client required.

## Comprehensive Solution

The edibles company selected Microsoft Dynamics 365 Business Central for financials, distribution, and manufacturing, with Velosio’s SilverLeaf solution. SilverLeaf is a comprehensive agribusiness ERP solution built to tackle the unique challenges cannabis growers and processors face. SilverLeaf Cannabis ERP delivers functionality for financials, production, inventory, shipping, and other vital workloads, so the company can easily manage, measure, and track performance to keep its operation growing. SilverLeaf integrates all the functions needed to optimize their cannabis business on top of Microsoft Dynamics 365 Business Central and includes integration to Metrc. Because of the high-risk nature of the cannabis industry, many organizations turn to Metrc-compliant software — which handles the seed-to-sale function required by state and federal law. Integrating Microsoft Dynamics 365 BC with Metrc compliant software helps streamline data management activities and establish a “single source of truth,” enabling true digital transformation.

### OVERVIEW

#### Software Solutions:

- Microsoft Dynamics 365 Business Central
- SilverLeaf Cannabis ERP

#### Challenges:

- Manual Processes
- Disconnected Systems
- Insight Constraints

#### Benefits:

- Automated Processes
- Improved Efficiencies
- Real-time data visibility in end-to-end solution
- Competitive Advantage

The edibles company has since rounded out its solution with Insight Works Dynamics Ship, Shopify integration, and Continia Document Capture. They have also engaged Velosio's Development Planning Services (DPS) team for several projects, including adding more robust Power BI reporting, integration to Salesforce using Power Automate, and more.

- For the Natural Goods division for CBD products (non-THC), Insight Works Dynamics Ship adds carrier integration, real-time shipping rates, package management and shipment tracking to Business Central.
- For the Natural Goods division for CBD products (non-THC), connecting Shopify and Business Central improves visibility into stock, pricing, existing customers and their online order histories, order status, billing, and payments. Better visibility means faster response to customer inquiries, timely returns and refunds, and more accurate order processing.
- Continia Document Capture is an end-to-end solution for Microsoft Dynamics 365 Business Central that enables the client to import, OCR-process, register, approve, and archive invoices and other business documents. Document Capture is fully integrated into Business Central.

Since the ERP solution was first rolled out to three entities as a template for future rollouts, Velosio approached training with a "train the trainer" philosophy, working with the client team to prepare them to train subsequent users and take ownership of the solution.

## Benefits

The edibles company believes that a strategy based on operational excellence gives them the ability to outperform and outmaneuver the competition. Deep visibility into business drivers and performance metrics drive a culture of continuous improvement. It's a huge advantage that the company now has a comprehensive ERP solution rather than a set of standalone systems loosely tied to an entry-level accounting package. This solution supports not only the cannabis industry for the client, but other industries that the company might cater to in the future. In concert with the ERP implementation, the client expanded its systems administration staff to support future growth. Improved inventory tracking and costing is a huge win, as well as meeting regulatory requirements.

## Future Plans

The company will roll out the Microsoft Dynamics 365 BC solution to its other entities based on testing and defining processes in its headquarters. Proven processes for business operations will serve as a model for additional locations. The client team is expanding its use of Microsoft Power Platform for better reporting and information dissemination and is working with Velosio to build out a more sophisticated data structure. Microsoft Dynamics 365 BC will support the big plans that the client has for expansion now and into the future.

Discover how Silverleaf can help your business with Microsoft Dynamics 365 business applications.

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