William Say & Co boxes clever with unique visual load planning tool from K3 Syspro

Tin box and canister manufacturer William Say & Co recently converted to K3 Syspro's advanced enterprise resource planning solution, SYSPRO ERP. To gain further efficiencies from its SYSPRO investment, the company recognised it also needed to automate its load planning to expedite deliveries. As a loyal customer, the company knew K3 Syspro well and once again turned to them for expert support.

William Say & Co is the largest independent tin box manufacturer in Europe. To improve efficiency the company needed an easy to use platform for load planning deliveries, using these planned loads as the basis for warehouse pick lists.

The vision was that pick lists would be used to verify the actual quantities picked together with the associated packaging used for the items. These confirmed details would then be entered into the load planning interface to generate actual despatch notes which would then be stored against

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At a glance

Company

William Say & Co

Industry sector

Manufacturing
- Tin box and canisters

SIC Code

82920
- Packaging activities

Number of employees

25 +

The challenge

- Improve efficiency for load planning deliveries
- Automate load planninng to expedite deliveries
- Update current despatch processes from sales order notes to automated loads

Solution & services

- SYSPRO ERP
- SYSPRO Reporting Services
- DataSwitch

The benefits

- Time saving efficiencies
- New accuracy to the business despatch process
- A quicker and more fluid supply chain operation

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the SYSPRO load reference and become visible from within the standard load plan query screens.

The right solution

After examining the company's unique requirements in detail, K3 Syspro designed a customised load planning solution that would provide a seamless fit with its ERP system.

"K3 Syspro's consulting process was interactive and allowed us to evolve the process as we went along. The flexibility of both the software and consultants were key to the success of this project. Working in a team like this was less prescriptive and more time efficient enabling us to deliver what would traditionally be viewed as a complicated piece of development in a far shorter space of time," says Garth Wilkinson, Operations Director, William Say and Co.

It was important that the load planning software would be easy-to-use and not require much technical knowledge. The management view was that K3 Syspro demonstrated a good understanding of the company's requirements and had the experience and knowledge of SYSPRO as a product, to create software that would streamline the load planning process without compromising the upgrade path for SYSPRO.

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"Information visibility is very important to us and we are looking forward to gaining the benefit from instant access to management data through SYSPRO. We were delighted that we did not have to go to a developer to find the solution we needed," says Garth Wilkinson.

Precision solution

K3 Syspro had installed SYSPRO with "Power Tailoring" functionality giving William Say & Co improved flexibility. The company was keen to use this and ensure it only used standard SYSPRO programs supported by simple VB scripting. The aim was to own its customised code and be free to evolve it as the technology progresses or the business expands.

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"The solution also provides a full upgrade path incorporating any special functionality that we have developed ourselves. It allows us to create our own load planning grid containing editable, interactive data and then sends it through to DataSwitch [K3 Syspro's solution for processing data from EDI files or database transactions] for processing while performing all operations within the one single piece of software," says Garth Wilkinson.

The workforce were familiar with SYSPRO working processes and were already using the unique DataSwitch module to import sales orders from the company's website and to raise linked inter-company purchase orders and sales orders from its manufacturing division.

As DataSwitch runs in the background, information can be fed directly from the customised panes to process the postings in SYSPRO. The panes developed for this load planning solution were designed to display data, prompt for entries, validate entries and then to pass data through DataSwitch for processing seamlessly into SYSPRO.

DataSwitch has been key to integrating our load planning tool with SYSPRO. It allows us to save time inputting information into various different systems as it links everything through a single channel. We are able to present and manipulate our own information into the custom panes and then submit it all through DataSwitch with the system producing despatch notes, purchase orders and receipts automatically," says Garth Wilkinson.

A slick process

All the customised panes are held within the standard load planning query screens, which provides a single access point to review or action all aspects of the process.

The first stage is to assign sales order lines to a load. This is done visually using a custom pane, which shows all outstanding sales order lines not currently assigned to a load. The load-planning tool has grouping functionality that allows

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operators to group the consignment by date and route. This enables them to see which orders need to be despatched on a specific date and the delivery routes they would typically be sent on.

The operator is then free to either accept the assumed load reference or update the despatch and delivery dates, routes or sequences within the custom pane.

When the load is ready for picking, the standard SYSPRO delivery manifest report is used to provide the warehouse with details of the load they need to pick. This report includes the assumed amount of packaging along with the customer's freight charges and prompts the team to accurately capture and charge for the quantities used on the load.

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Recording Despatch

DataSwitch clears out the sales order lines from the load plan and replaces them with the confirmed despatch note details. This means the confirmed despatches are all visible in the standard load planning query thereby maintaining a full record of what has been sent, when and where.

This completes the process in terms of load planning but DataSwitch is also being used to complete the inter-company supply process. If an item is picked that has been supplied by the manufacturing division, the linked purchase order is automatically booked in. Then the sales order raised by manufacturing is shipped and despatched awaiting a consolidated monthly inter-company invoice.

While William Say & Co has only been using its ERP system with the added load-planning functionality for a short time, Garth Wilkinson says the new working process has already made time-saving efficiencies and brought new accuracy to the businesses' despatch process. The accurate processing of load quantities was previously operated using a paper based system which wasted a lot of administrative time and was not nearly as accurate at the load planning solution that is now in place.

"Although we have not been using the full ERP solution for that long, already we are seeing a big difference in our efficiency. Before we had SYSPRO with load planning installed, we used to have to do a work-around to plan our deliveries, which took too much time and lacked accuracy. We can now do everything through the system, which is a significant benefit all round," says Garth Wilkinson.

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