

# CONTROLGEAR INSTRAMAC CASE STUDY



## TO MIGRATE A GREAT PLAINS END-OF-LIFE ERP SYSTEM TO NEXT-GENERATION MICROSOFT BUSINESS CENTRAL ERP WHILE SMOOTHLY INTEGRATING SIGNIFICANT CUSTOMISATIONS AND PROCESSES

Controlgear Instramac (CGI), a full turnkey electrical, control and instrumentation solutions provider, required a reliable reimagining of its enterprise resource planning (ERP) systems. The company wanted to migrate its end-of-life Great Plains ERP system to Microsoft Dynamics 365 Business Central. The goal was to leverage the platform's capabilities to launch an online store, provide live updates to customers, and streamline API integration. The company also wanted to develop additional sales channels within the business while reducing costs and refining processes.

As a mining and industrial sector wholesaler, CGI wanted to build an online presence that allowed for improved customer access and self-service capabilities. **"We wanted to build a store where**

**customers could log in 24/7/365, access and purchase products on their account and gain immediate visibility into stock availability,"**

said Deon Nieuwoudt, Operations Director at CGI.

However, the company had global teams of engineers with variable access to connectivity which made logins complex and access to information challenging. CGI asked Braintree to create a solution that would simplify logins and access while taking different locations and infrastructure limitations into account. Braintree provides CGI with Microsoft 365 licences which provide access to SharePoint and Teams and enhance collaboration and information sharing. This previous relationship made Braintree the perfect choice for when CGI opted into a full Business Central migration.

# KEY BENEFITS



- Successfully migrated an entire ERP system in one weekend, moving from legacy systems to Dynamics 365 Business Central with limited business disruption
- Clean data migration and team collaboration led to measurable system benefits and improved user adoption
- The system upgrade delivered a modern, intuitive interface that gives users instant answers to queries and better data insights. Employees have actively expressed satisfaction with the change
- Custom-designed dashboards now provide near real-time visibility into stock levels and allow sales teams to drill down into data for improved customer service
- Braintree provided Controlgear Instramac with an improved integration of next-generation ERP capabilities and resolved significant customisation, cost and optimisation challenges.

## COMPREHENSIVE DIGITAL TRANSFORMATION

**"We had to deal with a lot of legacy processes when moving over to Business Central," said Nieuwoudt. "As we've been operating since 1986, we had a lot of paper-based solutions and workflows which then had to be automated in Business Central, and the entire system optimised."**

The integration required some customisation. Braintree worked closely with CGI to create optimised layout fields for reporting formats, invoicing, sales orders and delivery notes.

As a result, CGI has access to clear dashboards that offer immediate visibility and allow for users to drill down into the data to better service customers and manage stock orders.

While the system is live, the teams continue to work together to create additional customisations across warehousing, delivery, and process information flows to further optimise the system and its capabilities.

The actual migration was also a smooth and efficient experience for the CGI team. It took six months and included configurations, workshops, mapping between legacy ERP system data and Business Central fields. Then, over the period of one weekend, the company migrated the remaining data which included open orders, final customer and vendor master lists, and opening balances. This allowed for the company to pick up where it left off by simply logging into the Business Central account.

**"We started on Saturday and were trading by Monday and this is definitely due to the support and buy-in we had from the Braintree team," said Nieuwoudt. "There were some drawbacks and challenges, but Braintree has worked with us to overcome these as realistically as possible and with relevant customisations that met the needs of our different teams."**

# A BENEFICIAL COLLABORATION

The implementation started in May 2024 and by November 01 it went live, providing the company with immediate value. CGI is already seeing the benefits of optimised workflows, clearer access to data, faster system response times, and easier navigation.

**"The look and feel is fresh and accessible, miles ahead of our original ERP platform,"** said Nieuwoudt. **"If I ask the system a question, I get answers and I can figure out insights and fix issues quickly. It hasn't taken long for employees to see the value in the system either – they are quick to tell me that they're glad we have moved across."**

Throughout the migration, both teams worked tirelessly to ensure the data was clean and accurate so it would deliver perfect visibility from the outset. It was worth the risk and the time taken. For CGI, the results have been exceptional, providing significant improvements across stock, data, transparency and processes. As Nieuwoudt concluded: "The Braintree team knew their stuff and the implementation was phenomenal. They made it easy for us to get what we need to achieve a successful migration.

It is a sentiment echoed by Courtney Hounsell, Account Manager at Braintree, who said: **"Customer involvement determines the success of a migration and CGI were hands-on, engaged and focused. It made all the difference to the final result and to the fact that Business Central is delivering exactly what they need."**



<b>PRODUCT &amp; SERVICES PROVIDED:</b>	Migration from Microsoft Great Plains to Microsoft Dynamics 365 Business Central
<b>ORGANISATION SIZE:</b>	33 employees
<b>INDUSTRY:</b>	Engineering (Turnkey Electrical, Control and Instrumentation Solutions)
<b>COUNTRY:</b>	South Africa
<b>BUSINESS NEED:</b>	ERP system upgrade

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