



**ecofort** sets the  
course for the future  
with **Microsoft**  
**Dynamics 365**  
**Business Central**

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## Microsoft and Boss Info: Partnership for growing business and increasingly complex requirements

The growth targets of ecofort ag can only be achieved profitably through digitalization and efficient processes. Thanks to Microsoft Dynamics 365 Business Central, limitations will be minimized for greater success.

### Initial situation

The successful Swiss trading company ecofort ag is pursuing a clear growth strategy: In 2023, more customers are to be served – with proportionally fewer staff while maintaining the usual high quality. In addition, ecofort plans to offer its reliable and efficient indoor climate products in other marketplaces, at home and abroad in the future. These are realistic growth targets, but they can only be profitably achieved with streamlined digitalization and efficient processes, not with multiple systems like before. At ecofort, it was decided that now was the time for a new, modern ERP solution.

### The company opted for Microsoft Dynamics 365 Business Central and Solution Partner Boss Info

The state-of-the-art ERP cloud solution from the global market leader promises a high level of investment protection, which was a decisive factor for ecofort.

Just like the full integration of all business areas, ecofort took the opportunity to align the workflows as closely as possible with the Microsoft Dynamics 365 BC standard. Adjustments or additions to the system are made where they measurably support ecofort's core competence.

For example, with connections to their ticketing system, the YellowCube logistics solution or the existing web store, through which ecofort customers have been placing their orders for more than 10 years.

Thanks to many years of experience and a high level of expertise, solutions partner Boss Info was also able to convince and support ecofort right from the start. In particular, the high level of expertise of the employees was highly appreciated. "We felt very well taken care of from the first moment", reviewed Thierry Graf the evaluation.



*Thierry Graf  
COO, ecofort ag*

"A system failure would be fatal for us and our customers. That's why we depend on reliable ERP software like Microsoft Dynamics 365 Business Central. So far, we have only used a fraction of what the cloud solution would effectively have to offer. We are always discovering new functions. We make adjustments either in dialog with Boss Info or on our own. With a partner like Boss Info, we get the highest possible security, because their competent employees take care of maintenance, backups, viruses or malware, and possible cyberattacks."



# The solution: everything comes together in Microsoft Dynamics 365 Business Central

From the initial order to a satisfied customer, many individual steps and applications are necessary. Cross-system information is delivered in real time by the intelligently linked Microsoft 365 Business central.

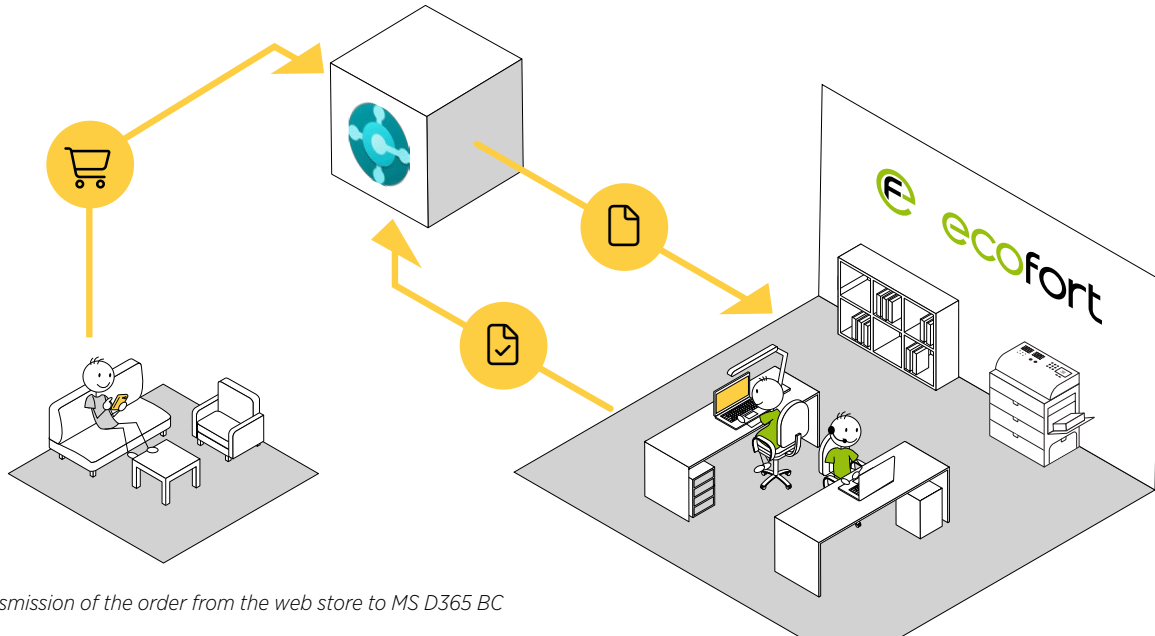


**1**

**Customer orders**

All customer orders placed in the web store are visible in Microsoft Dynamics 365 Business Central, the actual core of the solution.

An employee checks the incoming orders for correctness and releases them.



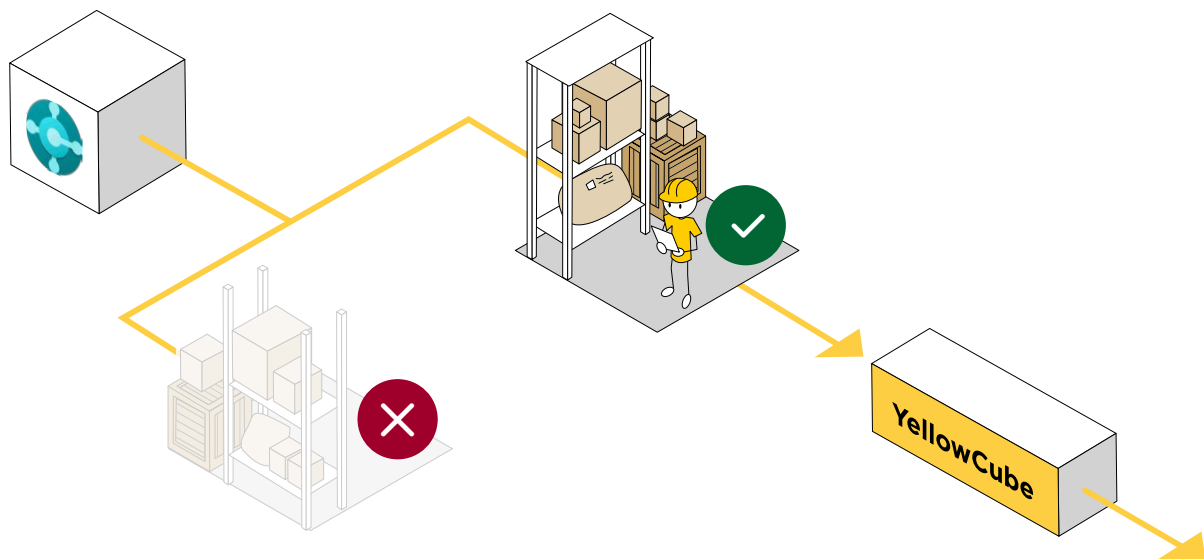
Transmission of the order from the web store to MS D365 BC

**2**

**Automatic warehouse selection**

The system then automatically suggests the ideal storage location, depending on which of the two postal warehouses currently has the product in stock.

The order is then transmitted to Swiss Post's logistics solution (YellowCube).

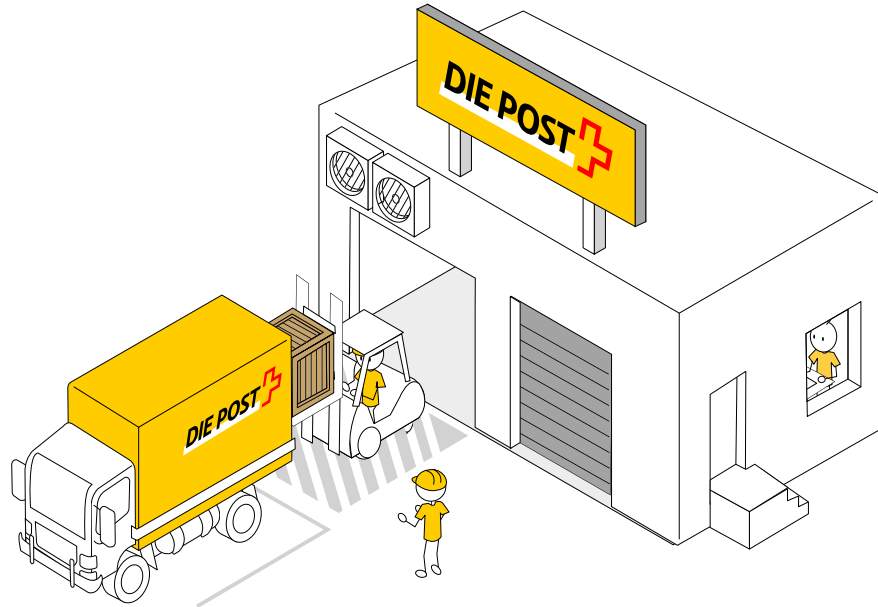


Automated warehouse selection and order transmission to logistics

3

**Shipping the goods**

Swiss Post, which already handles the storage of ecofort products, now takes care of shipping the goods.



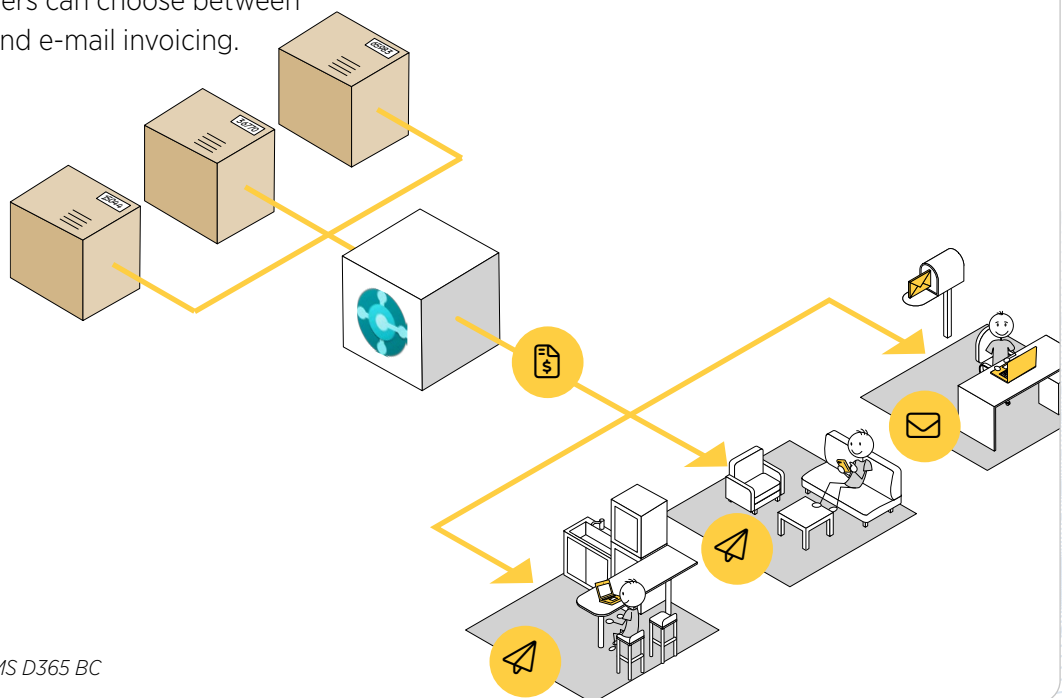
Shipping the goods by the post service

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**Generating invoices**

As soon as the respective shipment has a package number, the corresponding invoice can be initiated in the central office (Microsoft Dynamics 365 Business Central).

Customers can choose between paper and e-mail invoicing.

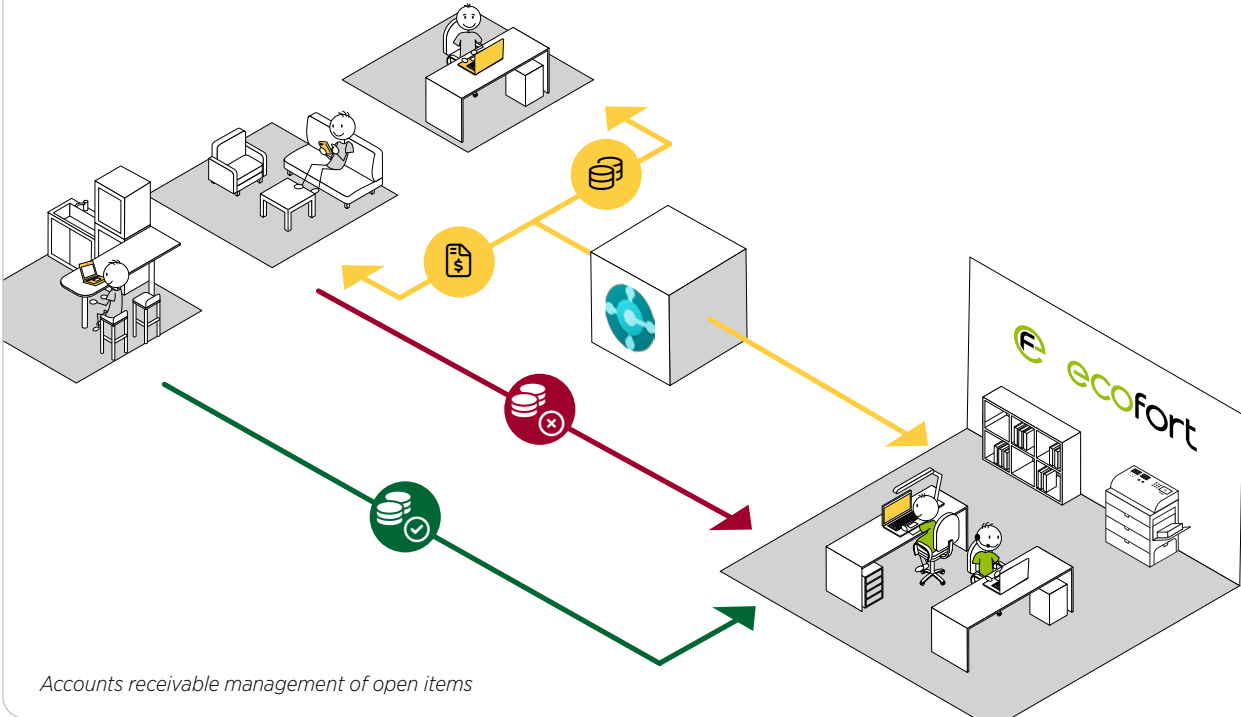


Invoice dispatch by MS D365 BC

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**Incoming payments**

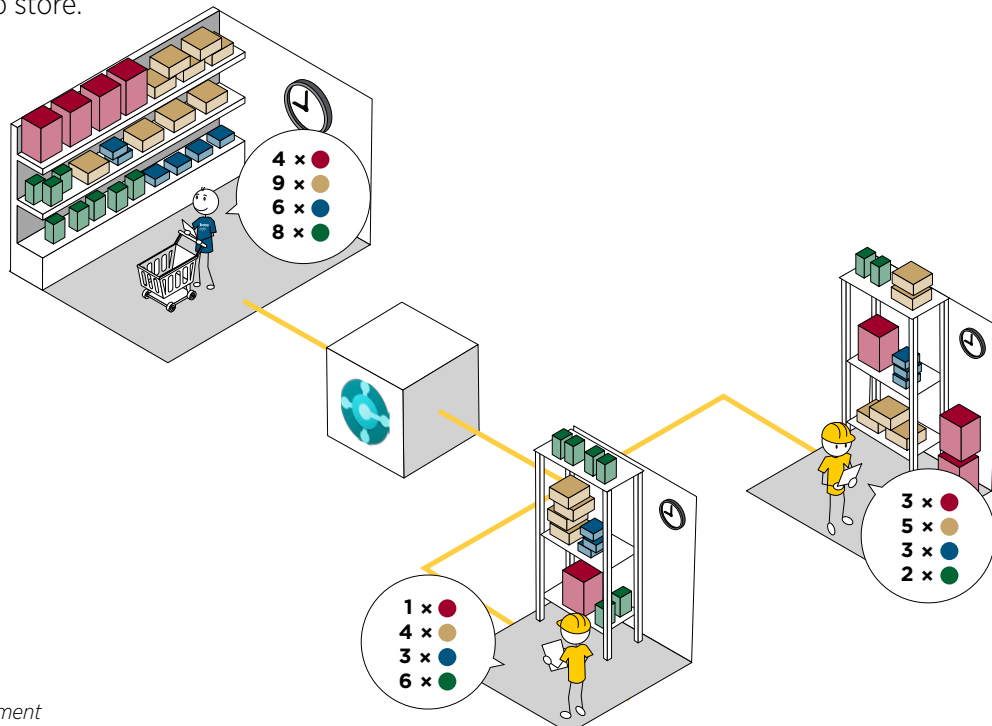
The booking of incoming payments has also become much easier. If payment deadlines are not met, the dunning process takes effect automatically. Even sales credit memos can be created and posted quickly and easily and are less prone to errors.



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**Current inventory**

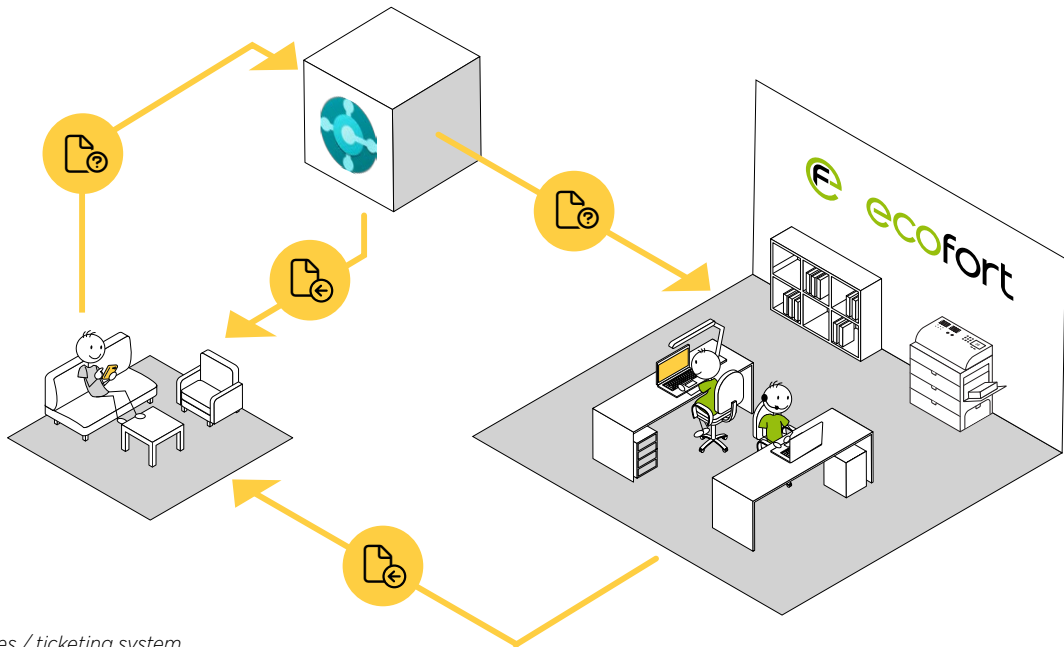
The stock level displayed in Microsoft Dynamics 365 Business Central is always correct, as sold items are continuously booked out and their availabilities are correctly displayed in the web store.



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**Customer inquiries**

When there are questions about orders, returns or warranties, the ticketing system comes into play. Every e-mail sent to the primary support address is converted into a ticket and automatically processed further depending on the category.

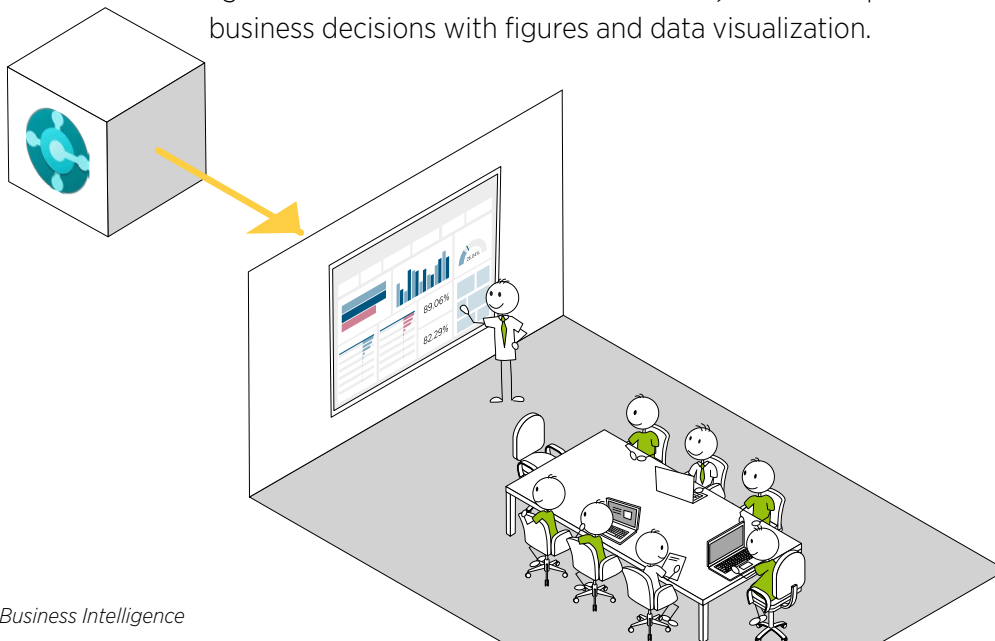


Customer inquiries / ticketing system

8

**Making business decisions**

Microsoft Dynamics 365 Business Central can be used optimally at management and decision-making level. All threads come together in the Business Central head office. Thanks to an up-to-date and well-founded database, meaningful KPIs (Key Performance Indicators) can be prepared with just a few clicks in combination with bossBI (Business Intelligence Tool based on Microsoft Power BI). bossBI helps to make well-founded business decisions with figures and data visualization.



Business Intelligence



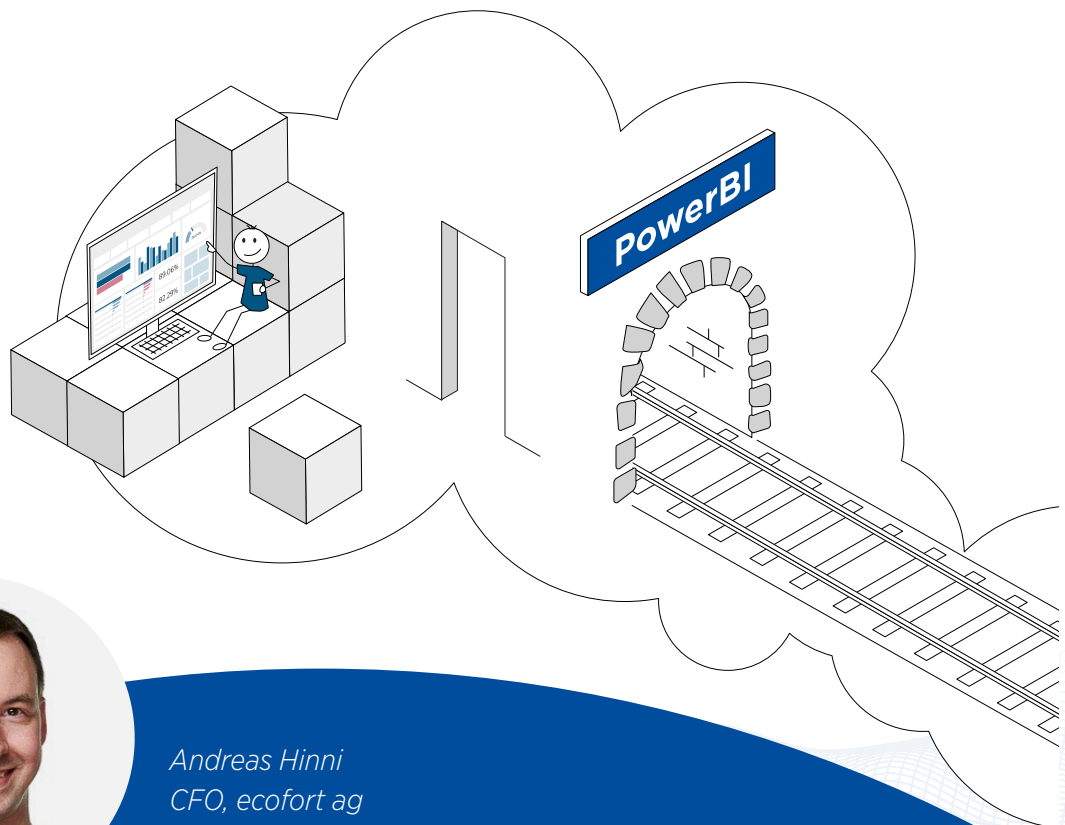
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**Easy operation also as mobile app**

The powerful, modern ERP cloud solution with role-based user interface based on Microsoft Office 365 is easy to use. Regardless of whether ecofort employees are in the office, in the warehouse or in the showroom, they benefit from unrestricted access to all business data. The mobile app from Business Central is particularly appreciated.



*Dynamics 365 Business Central app for mobile devices*



*Andreas Hinni  
CFO, ecofort ag*

"The ability to analyze all business areas is essential for planning and provides an important basis for decision-making. The clear dashboard of bossBI is something I would not want

to do without now – after such a short time – as it provides me with a 360° view of all areas."

## The benefits of the new solution: Faster, more productive and cheaper

### **Increased efficiency**

After a short time the efficiency could be increased by 20-30%.

### **ecofort goes digital**

With this digitization step, ecofort is setting the course for a digital future and thus laying the foundation for further growth.

### **Unlimited mobility**

Regardless of where ecofort employees are, they benefit from unrestricted access to all business data. The mobile app from Business Central is particularly useful.

### **Transparency and security**

Thanks to optimization of existing business processes and corresponding process integration, all business areas are now mapped centrally in Microsoft Dynamics 365 Business Central.

### **Key figures and analyses**

Thanks to an up-to-date and well-founded database combined with a business intelligence tool, ecofort always has meaningful KPIs in view.

### **Productivity enhancement**

Order and delivery planning are more precise and prevent unnecessary expenditure of resources or even loss of sales. Duplications are eliminated, and the susceptibility to errors has been massively reduced.

### **Quality improvement**

Lean, efficient processes are the key to success. They ensure high quality standards and thus satisfied employees and customers.

### **Ensuring the latest technologies**

Thanks to the SaaS approach of the basic technology, the business software is always up-to-date and ecofort is one step ahead of its competitors.

### **Scalability**

ecofort subscribes only to those services that the employees actually need. This reduces operating costs and provides the necessary flexibility.

### **Security**

Information and infrastructure are optimally protected.

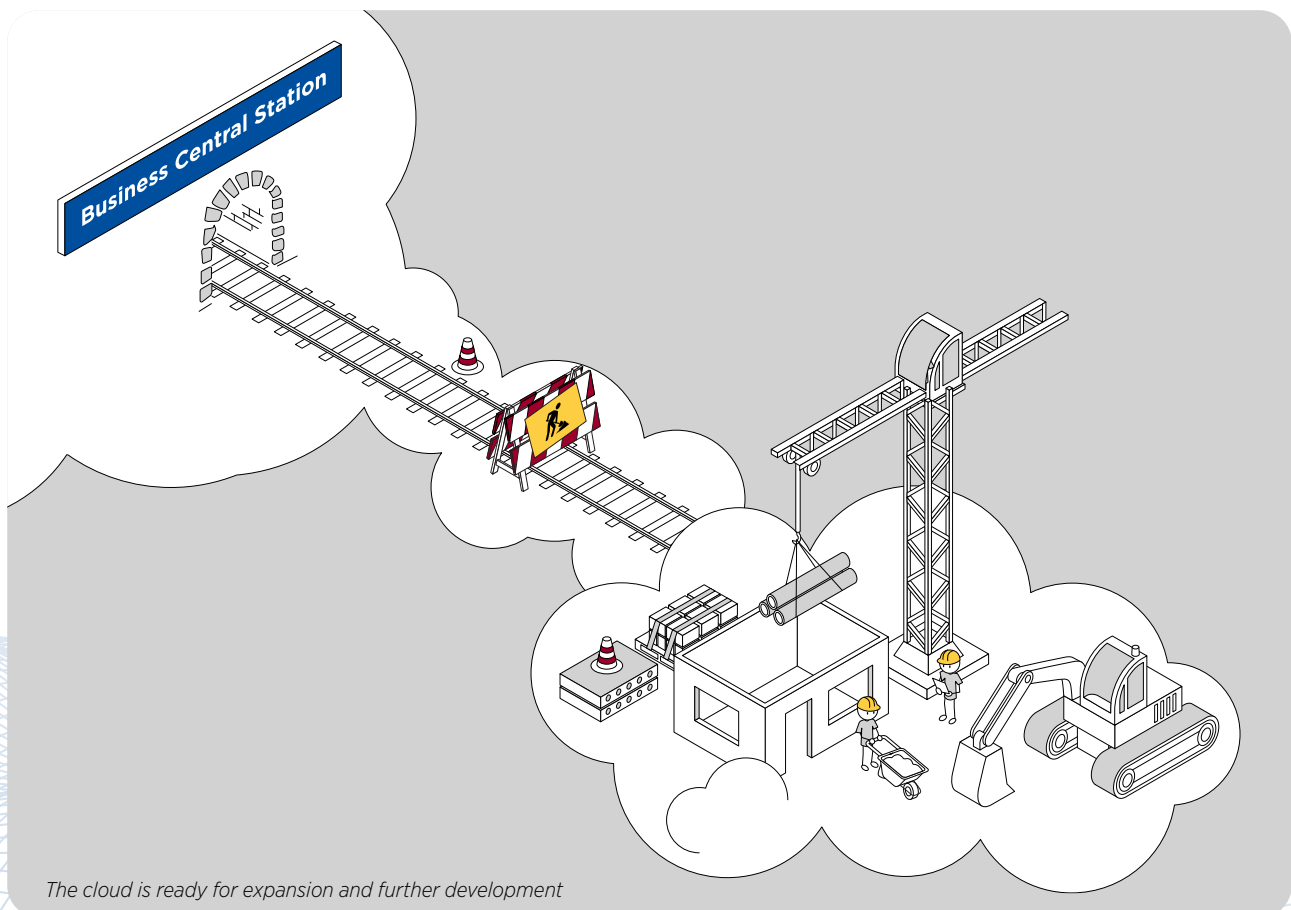
## The cooperation: in partnership and full of enthusiasm to the goal

Thierry Graf's team greatly appreciates the partnership and multifaceted collaboration with Boss Info. "The expertise and commitment of the Boss Info employees are highly valued and have contributed significantly to the success of the project," emphasizes Thierry Graf. Technology-savvy, as the project participants also are on the customer side, the ecofort team knew how to implement and provide a significant part of the necessary developments for the integration of the new solution into the existing system landscape right away. This makes project work fun!

## A look into the future

Optimization and further development of the solutions are continuously evolving. In regards to the connection of a new web store, where Shopify is being evaluated, the optimization of the aftersales process is planned. In addition to the harmonization of the prepayment process, EDI for the electronic exchange of data with Digitec Galaxus and Hornbach and the harmonization of the prepayment process are also important topics. DMS, time recording or ticket system will be looked at a later date.

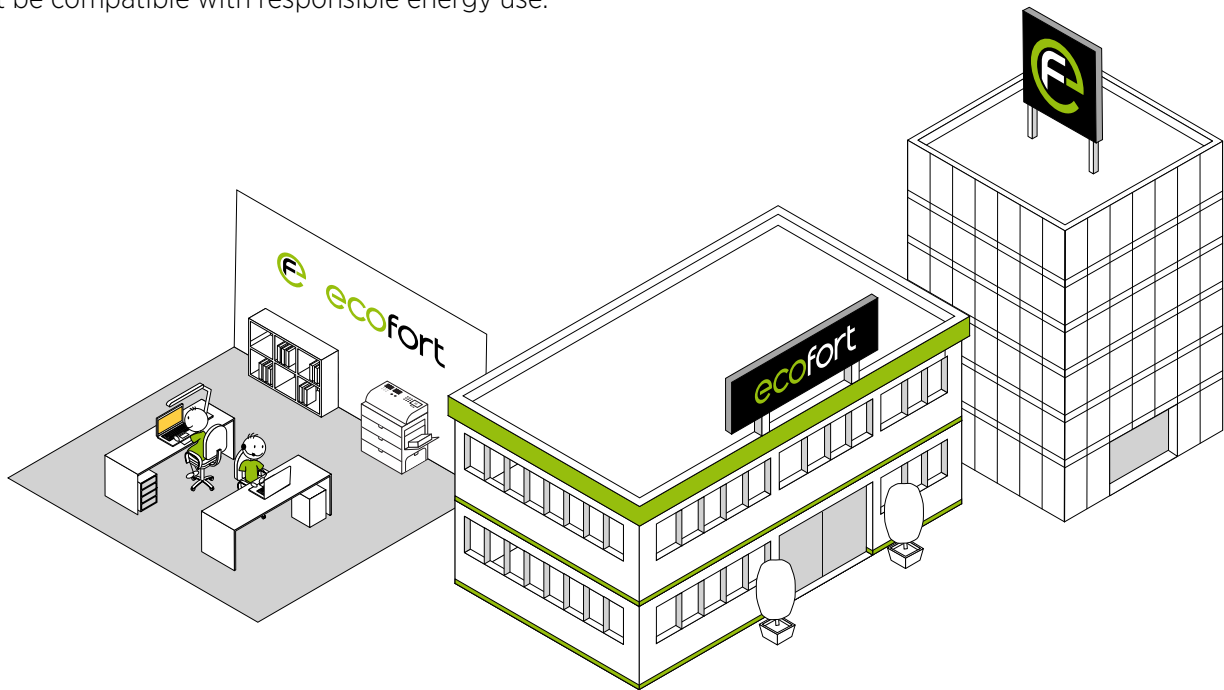
With Boss Info, ecofort has an IT company with a comprehensive overall offering (Boss Info Stack) at its side, which works together on an equal footing and develops the best possible solutions.



## About ecofort

ecofort ag is a Swiss trading company and supplier of innovative, high-quality and energy-efficient products for a comfortable and healthy indoor climate at home and at work. ecofort is convinced that a comfortable and healthy indoor climate must be compatible with responsible energy use.

The company distributes brands that are unique in Switzerland and develops own brands that outshine existing products. Founded in 2011, the company is based in Nidau (BE) and employs more than 20 people.



## Facts & Figures about the solution

### Basic modules Microsoft Dynamics

#### 365 Business Central

- Financial Accounting
- Accounts Receivable
- Accounts Payable
- Inventory accounting
- Order processing
- Delivery processing

#### Interfaces

- Connection to webshop
- Connection to ticketing system
- Connection to logistics solution YellowCube

### Additional modules

- Payroll accounting SwissSalary
- bossInterface
- bossWeb (connection to webshop)
- bossPayment
- WOD (correspondence documents)
- bossBI

### Project duration

- approx. 1 year (January 1, Go Live)

### User

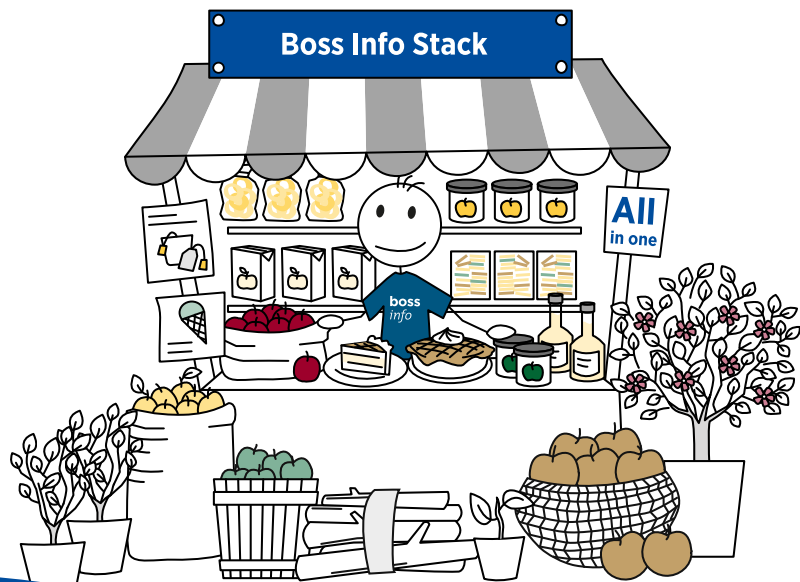
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## About Boss Info

The Boss Info team has over 300 specialists and is committed to a common goal every day: Through the use of innovative technologies, they use industry solutions, consulting, ICT solutions and services to digitalize the business processes of SMEs. Consistent implementation of the strategy and exemplifying the company's values – expertise, fairness, long-lasting relationships and commitment – have made Boss Info what it is today: Boss Info is one of the most successful independent providers of business solutions, ICT & cloud services, consulting services and collaboration solutions.

The 360° ICT range for companies includes proven in-house developments such as bossERP, bossSalary and bossGO and the Microsoft Dynamics 365 ERP solutions Finance & Supply Chain Management and Business Central, STEPS, as well as the Oracle solutions JD Edwards and NetSuite. DMS and Business Process Management solutions complete the product range in addition to custom developments and the extensive Microsoft 365 expertise.



*Boss Info provides a 360° ICT offering, comparable to an all-in-one store.*

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