



# CaseStudy



## Webportal for sales management with IT IS active



Bridgeport Fittings uses Microsoft Dynamics NAV together with SharePoint and IT IS active.

## The customer

Doing things Right. Bridgeport Fittings, Inc. lowers cost of their customers by delivering better quality, prompt and accurate services and trouble free performance consistently.

Bridgeport Fittings, Inc. was founded by Adelbert R. Auray and Neil G. Hayes in 1925 as the Bridgeport Switch Company. Initially, the product line consisted of electrical switches, bells, buzzers, wall switches and receptacles.

The company shifted manufacturing direction in 1936, when it was decided to emphasize conduit and cable fittings for the electrical industry. Malleable iron, steel, aluminum and brass fittings replaced the original residential electrical components. Later 1948, the company changed its name to Bridgeport Fittings, Inc.

Continued new product development, coupled with company's desire to be the market leader in quality conduit fittings, led to the introduction of two zinc die-cast products in 1958. Those products included the 3/8" BX and Romex connectors that remain popular today Bridgeport Fittings, Inc. to its current location in Stratford, Connecticut., nearby Bridgeport.



*Working at Bridgeport Fittings, Inc.*

Today, the Bridgeport Fittings line includes over 2000 products.

Bridgeport Fittings is working with Microsoft NAV which serves as an ERP-System. To handle the huge amount of products in the field of sales activities, Bridgeport is using a SharePoint-Portal with IT IS active to manage the processes in connection to NAV smooth and easily. The portal allows employees to manage sales relevant tasks in a web environment.

## The project targets

Due to the migration of Microsoft Dynamics NAV 2009 to NAV 2015 it was requested to do a migration of the SharePoint-Server and update of the IT IS active solution.

Therefore SharePoint 2013 was installed on a server and is running with IT IS active 2016. With the update of the software the design was updated to a fresh look and feel for the users.

## The solution

The portal serves as a hub for the employees to give an overview and maintain the sales affairs of the company. With the new version of IT IS active 2016 the portal is having some additional features in functionality and performance and is having a modern look and feel.



*Start of the Webportal*

The portal is divided into 9 sections for the several work flows in the company as reflected on the home page.

- Customer Information (Customers)
- Order processing (Sales Orders)
- Credits (Credit Memos)
- Debits (Debit Memos)
- RGA (Return Orders)
- RFQ (Sales Quotes)
- History (Sales Invoices and Credit Memos)
- Inventory (Items)
- Quote Files (Documents)

Each of the sections contains feature rich and informative screens that will guide the Bridgeport users to their areas of interest.





## View into the solution

**Customer Card** Functions Filter

Customer Information

- Customer

Order Processing

- Enter a New Order
- Modify Open Orders
- View Submitted Orders

Credits

- Enter a Credit Memo
- Modify Credit Memos
- View Credit Memos

Debits

- Enter a Debit Memo
- Modify Debit Memos
- View Debit Memos

RGA

- Enter a New RGA
- Modify Open RGA

No. 000120

Name AAA ELECTL-MONTEBELLO

Address 1014 MONTEBELLO BLVD.

City MONTEBELLO

State CA

ZIP Code 90640

Country/Region Code US

Free Freight Limit (LCY) 2,000.00

Customer Price Group

Customer Disc. Group NODISC

On the following pages, you will find screenshots of the solution which are showing the views which are implemented with IT IS active 2016.

On the Customer Card there are following actions implemented:

- *Previous* redirects you back to the customer list
- *Distributor Price List* shows a price list pdf report
- *Stock Quote* shows an according pdf report for those quotes.

Below screenshot shows a open order card with detail and listview.

**Open Sales Order** Functions Filter

Comment Preview Sales Order Submit Order Delete List

Order No. 485611

Sold-to Customer No. \* 016700

Sold-to Customer Name FIRST ELECTRIC-INDIANAPOLIS

Sold-to Address 1550 S FRANKLIN ROAD

Sold-to City INDIANAPOLIS

Sold-to State IN

Sold-to Zip Code 46239

Phone No. 317-931-3675

Order Date 9/16/2016

P.O. Number \* 4950

Job Quote Type Job Quote

Job Quote No.

Order Entry Status In Process

Ship All From 99WHSE

Free Freight Limit (LCY) 500.00

Ship-to Name FIRST ELECTRIC-INDIANAPOLIS

Ship-to Address 1550 S FRANKLIN ROAD

Ship-to Address 2

Ship-to City INDIANAPOLIS

Ship-to State IN

Ship-to Zip Code 46239

Reason Code

Carrier UPS

Carrier Service GROUND

Freight Shipping Payment Type Freight Allowed

Third Party Ship. Account No.

Order Total 505.42

Free Freight

Line	Catalog No. *	No.	Description	Location Code *	Sales Order Multiple	Qty *	Price Per Hundred	Price Each	Rep. Location Qty.	Whse. Qty.	Qty. In Transit	Country of Origin	Estimated Shipping Date
1	TWB-52	40052	3/4" EMT INSULATING BUSHING	38	50	100	5.87	0.0587	11,500	23,764	16,500	CA	09/23/16-REP
2	407-DC2	15407	1/2 SQUEEZE CONN. ZINC	38	50	50	36.68	0.3668	36,050	236,581	0	US	09/23/16-REP

**Submitted RFQ Card** Functions Filter

List Comment

No. RFQ148610

Sell-to Customer No. 011599

Sell-to Customer Name CED-AMERICAN ELEC-PUEBLO

Sell-to Address 304 S. MAIN ST.

Sell-to City PUEBLO

Sell-to State CO

Sell-to ZIP Code 81003

Job Name / Location SAN ISABEL SUBSTATION

Ending Date 9/30/2016

Status Submitted

Quote Total 1,645.30

Total Weight 69.66

Line	Catalog No.	Description	Qty	Net Weight	Requested Price\100	Whse. Qty.	Rep. Location Qty.
1	457-SLT	3" MALL/STEEL LT CONN	8	43.83	0.00	78	1
2	437-SLT	3" MALL LT CONNECTOR	8	25.83	0.00	274	67

Showing 1 to 2 of 2 entries

Page Range 300

Actions on the sale order view:

- *Comment* creates an associated note to the record
- *Preview* shows a pdf report
- *Submit* saves the sales order changes.
- *Delete* deletes the record
- *List* redirects back to the sales order list.

Left picture shows the submitted RFQ card with following actions:

- *Comment* creates a notice to that record
- *List* redirects to the RFQ list.

Filter						
No.	Sell-to Customer No.	Sell-to Customer Name	Document Date	Ending Date	BPT Quote No.	Job Name / Location
RFQ120895	015764	ELLIOTT ELECTRIC-BRYAN	7/11/2014	9/30/2016	111360	BRITT RICE COLLEGE STATION
RFQ120894	031177	CLS-HARTFORD	7/11/2014	7/30/2014	111359	Stamford Hospital Semac Elec
RFQ120887	002210	AMPERAGE ELEC. SY., INC.	7/11/2014	9/30/2016	111358	155 N Wacker
RFQ120881	015847	ELLIOTT ELECTRIC-CONWAY	7/11/2014	8/31/2014	111357	Conway Airport
RFQ120860	010091	CITY ELECTRIC CO-WATERTOWN	7/11/2014	12/31/2014	111729	SUNY IT
RFQ120859	020790	GRAYBAR-CINCINNATI	7/11/2014	8/11/2014	111353	GE/MAYER ELECTRIC
RFQ120848	012950	DICKMAN SUPPLY	7/10/2014	8/11/2014	111352	ARMY CORP./ESI ELECTRICAL
RFQ120847	027458	THE H. LEFF ELECTRIC CO	7/10/2014	8/29/2014	111351	Sub Station Stony brook
RFQ120847	016517	FASTENAL-WINONA	7/10/2014	9/30/2015	111350	test
RFQ120845	040001	GRAYBAR-NJ SERVICE CTR	7/10/2014	8/31/2014	111349	Stony Brook


Showing 1 to 10 of 6338 entries


The approved RFQ list shows a list of RFQs with the order entry status „Approved“. In the context menu, you can go to the approved RFQ prices or to the associated sales representative.

You can also open a list of prices for the RFQ.


Posted Invoice Card


FunctionsFilter


List



<< Back to Submitted Order

Order Tracking History

Comment

Show report

No.

342726

Sell-to Customer No.

015719

Name

ELLIOTT ELECTRIC SUPPLY

Sell-to Address

3804 SOUTH STREET

Sell-to City

NACOGDOCHES

Sell-to State

TX

Sell-to ZIP Code

75961

Sell-to Country/Region Code

P.O. Number

01-924693

Order No.

278410

Posting Date

9/20/2010

Ship-to Name

ELLIOTT ELECTRIC-NACOGDOCHES

Ship-to Address

3804 SOUTH STREET

Ship-to Address 2

Ship-to City

NACOGDOCHES

Ship-to State

TX

Ship-to ZIP Code

75961

Ship-to Country/Region Code

Invoice Total

23.92

Type	No.	Catalog No.	Description	Qty	UOM	Amount Including Tax
Item	91524	1524-DC	1 1/2" OFFSET NIPPLE	10		23.92

1

Showing 1 to 1 of 1 entries

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The left screenshots shows the posted invoice card. in detail view. Here following actions are available:

- *List* redirects back to the posted invoice list
- *Back to submitted orders* redirects back to the associated submitted order detail
- *Order Tracking History* shows a list of shipments
- *Comment* lets you create an associated comment
- *Show Report* shows the pdf report of the invoice

Customer

Bridgeport Fittings Inc.



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