



TECHNOLOGY  
AND TEAMWORK DELIVER



**SINGLE SOURCE**  
SYSTEMS, inc.

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An integrated team working with Infor CloudSuite™ Field Service ERP (formerly known as Infor Service Management) delivers organizational integration, alignment, and optimization for Champions Machine Tool Sales, Inc.

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## About

**CHAMPIONS MACHINE TOOL SALES** began in 1981 when business partners Ronnie Dutton and Rickey Martin, Sr. began selling machine tools in the Houston area. Offering the Kingston Machine Tool and Haas Automation products to its market, Champion's mission is to provide the highest quality, best value machine tools to the South Texas market and provide the best service and support for that equipment.



**SINGLE SOURCE SYSTEMS, INC.** is a software and solutions partner bringing more than twenty-five years of experience with Infor solutions and a focus on the needs of industrial manufacturing and equipment rental and service. The Single Source team offers insight, collaboration, and leadership in support of its customers' acquisition, implementation, and activation of technology.



**INFOR** is a global leader in business cloud software products for companies in industry specific markets. Infor builds complete industry suites in the cloud and efficiently deploys technology that puts the user experience first leverages data science and integrates easily into existing systems.



Over 68,000 organizations worldwide rely on Infor to help overcome market disruptions and achieve business-wide digital transformation.



# CHAMPIONS

MACHINE TOOL SALES

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**CUSTOMER** Champions Machine Tool Sales, Inc.

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**INDUSTRY** Industrial Equipment Rental, Manufacturing, and Service

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**PRODUCTS** Infor CloudSuite Field Service (formerly Infor Service Management)  
Mobile Users

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**INTEGRATIONS** Haas ERP Bundle  
Productivity Tools

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**LOCATIONS** 2 locations

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*We've been able to quadruple our size in the past twenty years while keeping a relatively similar sized management team. One of the ways we've done that is bringing in a full ERP with specialized field service functionality from Infor and Single Source Systems to help us drive automation and efficiency.”*

Toma Harrison, Business Manager, Champions Machine Tool Sales

## Case Study **Detail**

Champions Machine Tool Sales first reached out to Single Source Systems in 2015. A Haas machine tool dealer in Texas, they were looking for technology solutions that would open new ways to drive growth and differentiation without adding to their headcount and at a price point that was accessible for their small business. Known for a dedication to customer satisfaction and excellent ongoing support for its equipment, Champions also wanted a tool that supported their efforts to solidify and expand upon that reputation.



After an eight-month search, the cross functional team with representation from Sales, Service, Operations, and Finance, identified Infor CloudSuite

Field Service (then known as Infor Service Management) as the best match for their business needs.

They believed it was the solution that best addressed their project objectives:

- Eliminate disparate systems
- Eliminate duplicate data entry
- Improve new hire training
- Improve productivity and reduce overtime
- Track progress and hold people accountable

In addition to Infor CloudSuite Field Service, Champions also added Mobile Users and Single Source's product Productivity Tools.

**Mobile Users:** for mobile disconnected users who are required to synch throughout the workweek.

**Productivity Tools by Single Source:** offering enhanced functionality for users across the enterprise, Productivity Tools helps organizations get even more out of their Infor ERP deployment.

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*Customer support is key. That is the whole reason we went with Single Source in the beginning. We prioritize customer service in our business and we expect that from those we do business with.”*

Toma Harrison, Business Manager,  
Champions Machine Tool Sales, Inc.

## Data-Driven Decision-Making

Infor ERP solutions eliminate the need to enter data multiple times into disparate systems which means efficiency, a single version of the truth, aligned decision-making, improved customer service, and ready access to real-time business data.

- **Critical Numbers** are key performance indicators, or KPIs, that deliver a quick view of important statistics or track progress.
- **Data Views** are advanced data grids used to query custom sets of data, quickly and easily.

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*The biggest value to us are Critical Numbers, Data Views, inventory management, and having financial integrated. Our Infor solution gives us a snapshot of our business in one place.”*

Toma Harrison, Business Manager,  
ChampionsMachine Tool Sales, Inc.

## A Long-term Partnership Gets Started

In early 2015, the project kicked off. One of the first steps for Single Source and Champions was to establish a team that reflected the positions and roles necessary to most effectively define and deploy a comprehensive and transformative system. For Single Source that included Professional Services, Technical Services, Lead Consultant, Programming Services and a Programming Analyst and for Champions that included representation from Operations, Sales, Service, Finance, and Sales.

### A Process for Excellence

Following their Milestone Methodology™ implementation process, Single Source led the integrated team to the first milestone for Planning & Project Start-up. The work included five phases which allowed the Champions team to gain a practical understanding of the software and the Single Source team to gain a detailed understanding of Champions' business. The team

went through the discovery and development work necessary to define workflows, document data and reporting needs, specify integrations, and uncover any critical gaps or issues that needed to be addressed. One of the artifacts for this milestone was a FORD (findings, opportunities, recommendations, and decisions), then known as the Milestone Implementation Charter, which functioned as the project charter and guided the work through the rest of the deployment.

The team then proceeded to work its way through the remaining four milestones and fifteen phases. Encompassing System Definition, Business Piloting, Go-Live, and ultimately Optimization, the team connected business flows to the software, mapped the data, completed the modification work specified in the FORD, deployed multi-phased testing, successfully cleared go-live, and then turned their attention to post-go live optimization.

# What is Milestone Methodology™?

Developed over the course of our work with thousands of implementations over the past thirty years, Single Source's Milestone Methodology is a framework for guiding integrated teams through the multi-phased

work of implementing new or upgraded ERP software. Featuring five milestones and twenty phases, Milestone Methodology ensures a clear understanding of roles and responsibilities, an alignment on timing, and an

## Milestone Methodology™



### Planning & Project Start-up

Align, understand, define, document, and schedule.

Phases:

- 1) Project Setup
- 2) Perform Kickoff Activities
- 3) Install/Provision Software
- 4) F.O.R.D. Discovery & Presentation
- 5) Foundation Education

### System Definition

Configure, connect, and map.

Phases:

- 6) Application Configuration
- 7) Functional Workshops
- 8) Data Mapping Workshops

### Business Piloting

Pilot, report, and personalize.

Phases:

- 9) Conference Room Pilot 1
- 10) Analyze & Develop Personalizations
- 11) Perform Data Migration Rehearsals
- 12) Conference Room Pilot 2

### Go-Live

Train, convert, production, support.

Phases:

- 13) Train End Users
- 14) Go-Live Preparation
- 15) Production Cutover / Go-Live
- 16) Post Go-Live Support

### Optimize For Success

Monitor, evaluate, plan, and support.

Phases:

- 17) Assess Production Performance
- 18) Conduct Optimization Review
- 19) Resolve Production Problems
- 20) Plan for Future

## Specialized Integration with Haas



One of the most significant modifications outlined in the FORD was an integration with Haas. As a leading dealer of Haas equipment, it was important to Champions that they delivered on Haas service and reporting requirements and did so as efficiently as possible. There were a number of components to the development including:

- Mobile was modified to support Haas specific data capture and reporting needs.
- Consignment inventory functionality was added to ensure inventory, tracking, and AR/AP integration was available to both Champions and Haas.
- Parts update was automated to support efficient Haas parts updates.
- An integration with Haas' SAP system delivered automation.

### Mobile Integration

In addition to Champions' desire for improved access to field service visit data, Haas also required specific information associated to each visit. To facilitate that, Single Source incorporated a modification to expand the data points collected via mobile and then automated the sharing of that information with Haas.

### Consignment Inventory Specialized Need

Another important Haas specific functionality was the way the system handled consignment inventory. Although CloudSuite Field Service did not have robust enough consignment inventory to support Champions' needs, other Infor's

CloudSuite Industrial (Syteline) did. Because Single Source also has significant experience with CloudSuite Industrial (Syteline) as well as the Mongoose framework, bringing that consignment functionality to the Champions ERP deployment was accessible from a time and cost perspective. With this enhanced functionality and the associated integration with Haas' SAP system, the management, purchase order, and AR/AP functionality associated to the Haas consigned inventory was optimized for both Champions and Haas.

### Parts Update Automation

The Single Source work associated to the third area of the Haas ERP Bundle, automation of parts updates, may have been limited, but the impact on efficiency was measurable. Because Haas updates their parts inventory regularly, Champions wanted a way to automate what had largely been a manual task. As part of its work on integration, Single Source deployed automation of this update.

### SAP Integration

Finally, underlying all the work was the actual integration of Champions' Infor deployment with Haas' SAP system. To save time, ensure accuracy, optimize inventory management, speed up AR/AP functions, and more, Single Source developed integrations with Haas' SAP system. Experienced with API integrations and leveraging more than thirty years' experience with CloudSuite ERP products, the Single Source team was adept at knowing the trigger points and how to leverage web services for a stable and secure integration.

## Just In Time For Hurricane Harvey

When specifying the software needs, there wasn't any way for the team to have foreseen how important it would be in late summer/fall of 2017. As Houston and the Houston economy worked to recover from the devastating effects of Hurricane Harvey, Champions relied heavily on its Infor ERP deployment. Because they had this centralized, fully integrated ERP in place they could foster communication and collaboration in and out of the office. Perhaps most importantly, the software's scheduling functionality allowed Champions to efficiently

schedule and coordinate months of repair and service necessary to get their customers back up and running.

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*It was definitely a positive having the system in place because all departments were better poised to communicate.”*

Toma Harrison, Business Manager,  
Champions Machine Tool Sales, Inc

## Single Source's Haas ERP Bundle Delivers Automation

To ensure efficiency, accuracy, and compliance for its relationship with Haas, Champions asked Single Source to develop and automate an integration with Haas' SAP system. To do that Single Source created and delivered a Haas ERP Bundle specifically for Infor

CloudSuite Field Service. The bundle enhanced data collection, automated actions, integrated with mobile, and expanded capabilities for tracking, invoicing, and reconciling of consignment inventory.

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*It was important to deliver a modification that met needs of both Haas and Champions. There were multiple flows and data points involved, but because our development staff is adept at working with APIs and the Infor software so that they could accurately and efficiently designate the right trigger points.”*

Chris VonEhrencrook, Business Consultant, Single Source Systems



## Full ERP Specializing In Field Service Delivers Organizational Alignment



Infor CloudSuite Field Service (formerly Infor Service Management) is an end to end full ERP with specialized field service functionality. No other service lifecycle solution offers the same combination of broad enterprise capabilities plus depth of service expertise and functionality. With complete functionality including contact center, work orders, rental management, warranty and claims management, CRM, accounting, distribution, and more, Infor CloudSuite Field Service gives its customers the ability to seamlessly manage their entire business from a single solution.

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*Having a full ERP with robust field service capabilities all at an accessible price point was really important to us. We wanted integration across the organization and a centralized view of our data. Infor's solution offered that to us.”*

Toma Harrison, Business Manager,  
Champions Machine Tool Systems

### Growing & Evolving The System

Champions knew that to get the most out of the technology ongoing work was necessary to grow and evolve the way the organization leverages the software to drive their business. Since their go-live date, the integrated Single Source / Champions team has consciously and specifically worked to ensure that the software is helping Champions better serve their customers, optimize their operations, and grow their business. The work has included an upgrade to 5.2 which enhanced GPS functionality as well as some reporting and data capture modifications.

Because of the modifications, especially the Haas integration functionality, upgrading to

5.2 required a bit more care than it might for organizations without that modification. The upgrade was important though as it dramatically expanded Champions ability to leverage Rhino GPS to plan their routes and manage their workforce. Serving a large geographic area means that workforce route optimization is of measurable value and Champions wanted to bring that to their team. With Single Source's help, they successfully completed the upgrade, deployed significantly improved route planning and were able to save time and resources while simultaneously delivering improved customer service.

## People + Technology + Common Goals

Whether it's the initial implementation or the ongoing work since launch, it's been a productive relationship for Champions and for Single Source. Both parties recognize that technology requires people to turn its potential into value and that there is a need for all parties to be actively at the table. Single Source has significant experience with Infor CloudSuite products and within the industrial machine equipment and rental industry but was not versed in the unique business flows and data demands of Champions. Champions understood its businesses and business priorities, but wasn't versed in the structure, language, and function of CloudSuite Field Service and associated products. Together, the Single Source and Champions team built a relationship based on respect, responsiveness, and a common goal to grow and improve individually and collectively. It is in this space, that the potential for technology to deliver value was and continues to be realized for Champions.

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*If you have your customer as a partner you improve your own product. We come up with solutions together and they become better at what they do and we become better at what we do.”*

Cory Rhodes, President, Single Source



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