

Bell Tea Company and iQ4bis: Tasting Success with Microsoft Dynamics AX and iQ4bis

**iQ4bis Works with
Dynamics AX,
Enabling Better Access to Critical
Information**

Business challenges

- Needed more responsive method for pulling vital information out of ERP system
- Equip users to extract and analyze data for themselves
- Enable better information access to support business decisions
- Reduce time spent preparing new or modified reports

Business results

- Provided 'self-service' BI capabilities for managers
- Enhanced existing Microsoft Dynamics AX capabilities
- Improved analytical capabilities for financial planning, marketing, and sales
- Integrated archived sales data into current analyses



Self-service for managers

The Bell Tea Company is the market leader in the New Zealand tea industry. To keep that position, Bell Tea implemented Microsoft® Dynamics™ AX ERP platform. “We had just replaced and upgraded our servers and network,” says Financial Controller David McKeown. “We were happy with the speed and flexible database management capabilities that Dynamics AX provided, but it was still a challenge for our managers to quickly and easily get the information they needed.”

“At a local iQ4bis User Group meeting,” McKeown says, “I met other people who were using iQ4bis. They confirmed that iQ4bis could provide everything we needed at a price we could afford.”

“Afterward, in a Proof of Concept exercise, we did a quick dump of our Dynamics AX database to a CD and sent it over to the team at iQ4bis,” says McKeown. “In only days, they were able to show us the power of iQ4bis with our own data. We could query the database, change parameters, drill-down, consolidate data, and generate reports. I quickly saw how easy it was to run my own analyses. It was nothing short of superb. We were quickly sold on iQ4bis.”

Integrates archived data

“The iQ4bis team loaded the software onto our servers, set up the links between iQ4bis, Dynamics AX, and SQL Server and that was it. Two training sessions—a basic ‘how-to’ for about ten people who would be casual users, and a more focused session for the ‘power users’—were enough to get us going.” said McKeown. “Most of the current work we do with iQ4bis uses the views that the team set up for us as part of that Proof of Concept exercise.”

iQ4bis is optimized to run in a Microsoft Dynamics AX and SQL Server environment. “iQ4bis adds easy-to-use, powerful front-end access to Dynamics AX through the iQ4bis Analysis Web and iQ4bis Data



Bell Tea Company and iQ4bis: Tasting Success with Microsoft Dynamics AX and iQ4bis (continued)

Server,” McKeown says. “Because iQ4bis is optimized for the Microsoft environment, implementation is quick and the product delivers almost immediate benefits.”

iQ4bis also helped Bell Tea bring the historical data saved from its prior ERP system into iQ4bis. “Our historical data was essential for running long term sales comparisons that help predict customer demands and highlight any areas of concern,” explained McKeown.

Improves analysis

“I’d recommend iQ4bis to anyone,” says McKeown. “We’re just scratching the surface of what we can accomplish. iQ4bis is saving me hours of report preparation time each month. Our managers can now do their own analyses instead of relying on me to write reports for them. They have more timely access to the information they need, and that enables better, more responsive decision making. Plus our accountant and national sales managers use the capabilities of iQ4bis to track trends and make operational adjustments as required.”

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David McKeown, Financial Controller, Bell Tea

Enhances Dynamic AX

iQ4bis fits so well into Bell Tea’s operations because it is optimized to run in conjunction with Microsoft Dynamics AX and SQL Server. “iQ4bis adds front-end access to Dynamics AX through the iQ4bis Analysis Web and iQ4bis Data Server (data

warehouse),” McKeown says. “And since the data is already in a format for iQ4bis to latch onto, implementation is almost a non-issue. You get almost immediate benefits.”



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Who uses iQ4bis in Bell Tea

- Financial Controller
- Accountant
- Food Services Account Manager
- Key Account Managers

Benefits for Bell Tea

- Enhanced existing Microsoft Dynamics AX capabilities
- Improved analytical capabilities for financial planning, marketing, and sales
- Provided “self-service” BI capabilities for managers, enabling more timely decision making
- Integrated historic sales data into current analyses, helping predict customer demands and trends

Associated Platforms

- Microsoft Dynamics AX (ERP)
- Microsoft SQL Server (SQL database)

iQ4bis Views

- Analysis Web

Key Reasons Bell Tea Selected iQ4bis

- Perfect fit with Bell Tea’s existing software and hardware environment
- Strong recommendations by users at similar companies
- Proof of Concept demonstrated immediate benefits
- Pricing within Bell Tea’s budget and expectations

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