



Albion Valves Power Growth and Productivity with Microsoft Dynamics 365 Business Central and Synergy Technology



Microsoft Dynamics 365
Business Central



synergy
technology

Introduction

Albion Valves (UK) Limited, based in Barnsley, South Yorkshire, is a long-established and highly respected supplier of industrial, process and building services valves to the UK HVAC and industrial markets. Operating exclusively through a nationwide network of independent distributors, Albion acts as a specialist supplier rather than selling directly to end users, providing a complete, readily available valve solution backed by strong technical support and service.

The privately owned business employs around 55 people and generates approximately £20 million in annual turnover, holding an estimated 15% share of the UK valve market, supported by a network of trusted manufacturing partners worldwide and more than 400 active distributor relationships.

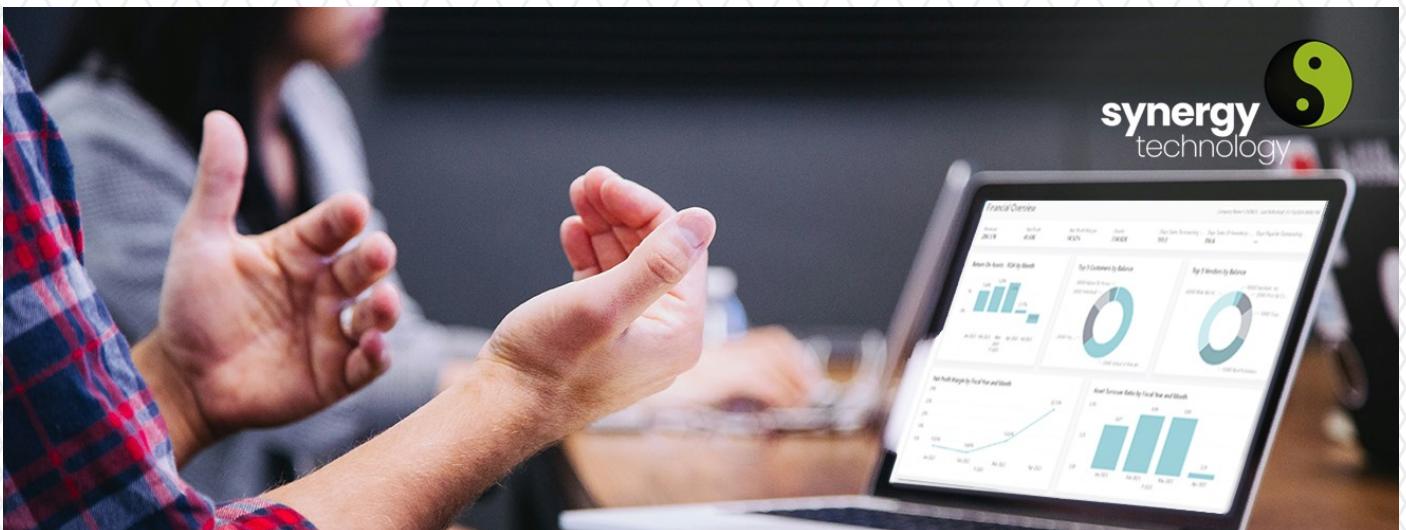
Stephen J. Bloomer, Financial Director and Company Secretary, oversees ICT, HR and legal matters, and serves as internal owner of Albion's core ERP platform, Microsoft Dynamics 365 Business Central.



The Challenge

Albion's business model depends on reliable availability of thousands of valve SKUs, coordinated between a global manufacturing base and a large UK distributor network, which placed increasing pressure on its legacy on-premises Navision (NAV) system. As the NAV 2015 solution approached end of life with diminishing updates, the business faced growing risk around supportability, limited remote-working capability, and a lack of modern cloud features such as robust disaster recovery, Stephen comments "We were forced to move from NAV. We had no choice because it was becoming a legacy system and wasn't getting the upgrades it needed."

When Albion's previous NAV partner went out of business, the company suddenly lost application support, exposing how dependent day-to-day operations were on a single, increasingly outdated ERP platform. As Stephen explains, "our previous partner went bankrupt and we didn't have any support for a few weeks and we knew of Synergy Technology, so we approached them and asked if they were able to take over the contract, look after us and transfer the licences." At the same time, paper-heavy processes around finance, stock and customer documentation created inefficiencies: staff spent time searching filing cabinets, manually attaching technical certificates and data sheets, and rekeying information, constraining productivity in a organisation where specialist finance and IT capacity was limited.



The Solution

Albion selected Synergy Technology initially to take over support for NAV and subsequently to lead the move to Microsoft Dynamics 365 Business Central in the cloud, valuing Synergy's ability to respond quickly at a critical moment. Stephen recalls, "I went to a couple of others as well, but the main thing was that Synergy knew the system. They knew what they were doing, they'd done their research, and speaking to various people in your business at the time, seemed to be best placed to take over the contract quickly and to become well acquainted with our business quickly as well. Time was of the essence because we had no support."

Microsoft Dynamics 365 Business Central offered a modern, integrated ERP platform covering finance, purchasing, inventory and sales, with tight integration to the wider Microsoft ecosystem and a proven upgrade path from NAV, giving Albion a familiar but future-ready core system.

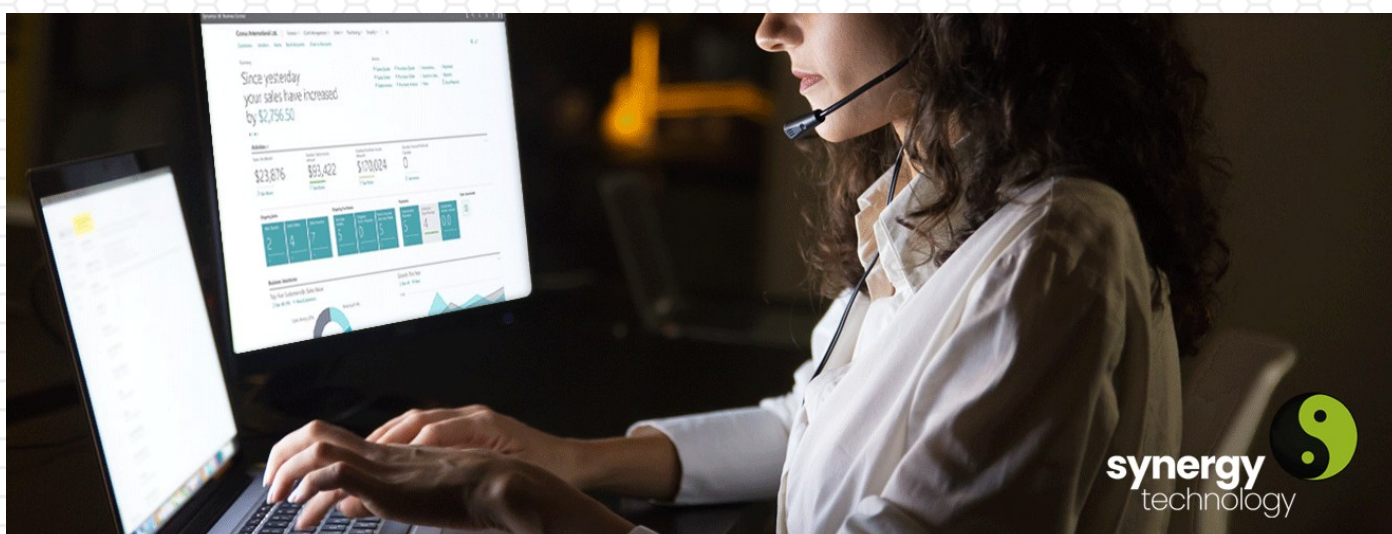
Once the decision was made, Albion and Synergy used the upgrade as a strategic opportunity rather than a simple technical swap. Stephen explains the thinking "We wanted to move forward as a business, be more cloud-based for a lot of reasons, being able to work remotely more easily, dealing with things like pandemics, and having disaster recovery in place," and adds, "we also took the opportunity to review all of our bespoke elements in NAV. Some of that has been moved over, but at the same time we asked, if we were getting a new system, what would we want it to do?"

This led to a structured scoping process: "as part of scoping the upgrade from NAV to Business Central we looked at what the system did, what we could take advantage of, and what we could achieve through potential bespoke developments. I must say 90% of what we wanted was achievable quite quickly through the upgrade, with Paul (Synergy developer) creating some bespoke processes for us."



Stephen, as a naturally risk-averse accountant and planner, was closely involved in the project from end to end to ensure a smooth and controlled transition. "There were a lot of working groups, especially involving Synergy and in particular Paul, to get it done in a precise way because Business Central is our main ERP in the business, so it had to be spot on," he notes, summarising the governance that underpinned the upgrade. Reflecting on the move, he comments that "It was both a necessity and an opportunity to do upgrades at the same time and create a really nice system which would be a more useful tool and take advantage of the tools that were already there."

In the new environment, Albion uses Business Central as their main ERP solution across finance, stock, purchasing, sales order processing and invoicing, while integrating the company's specialist CRM platforms via APIs. Stephen describes this breadth of use clearly: "We use it for a couple of elements. Obviously for myself we use it for the finance part of the system, but we also use the stock system and the replenishment part of the system. We use it for purchase ordering, sales, invoicing and so on." Synergy supported Albion in making the most of Business Central's cloud capabilities by moving from on-premises infrastructure to a SaaS environment, improving resilience, enabling secure remote access for staff and laying the foundation for future integrations with tools such as CRM and web-based customer services.



A standout element of the partnership has been the development of Simple Stock Ordering, a Synergy-developed Business Central add-on that Albion helped to co-design in response to limitations in standard stock functionality. Stephen explains how closely the two organisations worked together. “As part of moving from NAV to Business Central we wanted something created, and we ended up working with Synergy to create the Simple Stock solution,” and reinforces this by saying, “It was born out of our necessity for some sort of solution to help with our stock positions and so on, because the stock functionality in Business Central as standard is not that good.” Simple Stock Ordering consolidates stock levels, inbound supply and historical demand into a single view and calculates recommended purchase quantities, enabling Albion’s purchasing team to make informed replenishment decisions quickly and accurately while still using core Business Central requisition and purchasing workflows.

The relationship has also been driven by the people involved, particularly on Synergy’s side. Stephen emphasises, “I work very closely with Paul and Amanda. Paul, I describe him as a genius when it comes to Business Central. If something can be done, he’ll tell me it can be done. If it shouldn’t be able to be done, he still somehow finds a solution. He always works with you closely to get it done,” and goes on to say, “he knows that system inside out. As soon as you ask him a question, he can answer it off the top of his head. He was the glue that made the upgrade work perfectly.” He also highlights the wider team. “Amanda is always smiling, always positive. We have had issues in the past around licensing when we moved over and Amanda was always on top of that, trying to get it sorted. As our business relationship manager she is fantastic,” and adds, “as a developer, Paul is second to none, he’s the Rolls-Royce of what you could get.”



The Results: Productivity Gains

The move to Business Central and the associated process redesign have delivered significant productivity gains for Albion, particularly through a strategic push towards paperless working in finance and order processing. Stephen notes that “there were quite a few leading indicators for upgrading; another one was moving towards paperless. That has improved productivity a lot,” and describes the change in day-to-day work “We no longer have to go to filing cabinets to get information, it's all saved on the system. We used to have cabinets full of paper and if you wanted to query something, you had to go and find it, dig it out, scan it and send it to the customer. Now it's all automatically in Business Central.”

Simple Stock Ordering has given Albion far better control over stock positions by aggregating stock levels, open demands and historical sales into one interface, calculating weeks of cover and suggesting order quantities that can be easily adjusted. Stephen summarises its impact: “The Simple Stock solution have saved us time, money and effort. Also, we added links onto sales quotes and orders that take you directly to our website for certificates and data sheets. That was an idea we had developed. Previously we had to attach all that manually; now it's automatically there on the quote and we can just say ‘go onto the quote and click the link’,” and concludes, “again, that has saved time for our sales team and allows them to focus on more value-added activity.”



The Future

Albion Valves now budget annually for continuous improvement on Business Central, treating the system as a living platform that should evolve with the business rather than remain static. Stephen's outlook is clear: "Sky's the limit. I put a bit of budget to one side every year. I mainly listen to what people want; I don't lead on everything, I ask what the business needs. If the business has an idea about changing something, we look at it and see if it's possible," and he continues, "every year I try to scope out something new, some upgrade. On NAV it was a bit stale; we didn't do anything for quite some time. With Business Central now, being cloud-based, in a SaaS environment, and having a good partner in Synergy, I think we shouldn't sit still."

Stephen explains the ongoing approach: "where we can take advantage of new things that Microsoft create or look at bespoke development to help productivity or streamline processes, we will. I listen to the business and what they need," and underlines the importance of the relationship by stating, "We're now becoming a lot more technologically focused as a business and I would say Business Central is central and key to that. Having a key partner like Synergy Technology to help us is something we need."



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