

# Success Story ulrich medical®

## Offline Sales App for the mobile sales force

### Offline-capable, customizable and easy to use – ulrich medical® relies on the Anveo Mobile App

Ulrich medical® is an innovative, medium-sized, family-owned company. After its foundation in 1912, the company initially focused on the production and sale of surgical instruments. Over the years, the product portfolio has been continuously expanded. Today, ulrich medical® is a specialist in the field of medical technology and develops high-quality products in the following areas:

- Surgical instruments,
- Spinal systems,
- Contrast media injectors and
- Tourniquets.

The company relies on quality "made in Germany" and produces exclusively in its home country. Distribution is carried out worldwide.

## Initial Situation And Requirements

The company had already deployed a mobile, offline-capable solution for its field staff, but was looking for new, more modern software.

The following points were particularly important to ulrich medical®:

- **Offline capability**
- **Good connection to the ERP system Microsoft Dynamics NAV**
- **Customization to individual needs**
- **Support of different operating systems**, since a step-by-step switch from iOS (iPads) to Windows (surfaces) should take place
- **High data security**, no cloud-based solution
- **Easy handling** for developers and users alike

#### ulrich medical® at a glance

**Founded:** 1912

**Employees:** approx. 350

**Industry:** development, production and sales of medical products

**Sites:** Headquarters in Ulm, Germany and US subsidiary in Chesterfield, St. Louis, Missouri

**Go-Live with Anveo:** June 2017

**Website:** [www.ulrichmedical.com](http://www.ulrichmedical.com)

*"Our field staff must be able to work offline and access the NAV system while on the move. We were therefore actively looking for a suitable app. A pure online solution has never been an option for us."*

Alexander Bruckert

Technical Project Manager,  
ulrich medical®

# Decision Making

To meet these requirements, the solutions of various providers were systematically evaluated. During the [Quick Start Workshop](#), Anveo carried out a detailed requirements analysis and feasibility study. The [Anveo Mobile Sales App](#) finally established itself as the optimal software for ulrich medical®.

*"Anveo has convinced us with its **flexible customizing possibilities**", explains Alexander Bruckert, technical project manager at ulrich medical®. "If the time is available, you can set up everything yourself. The add-on is easy to understand and simple to use, directly out of Microsoft Dynamics NAV."*

He continues: *"We have also looked at some major solutions, but they offered too many possibilities, of which we would only use a very small fraction. This is economically pointless. **We needed a slim solution that would not overwhelm the user with unnecessary information.**"*

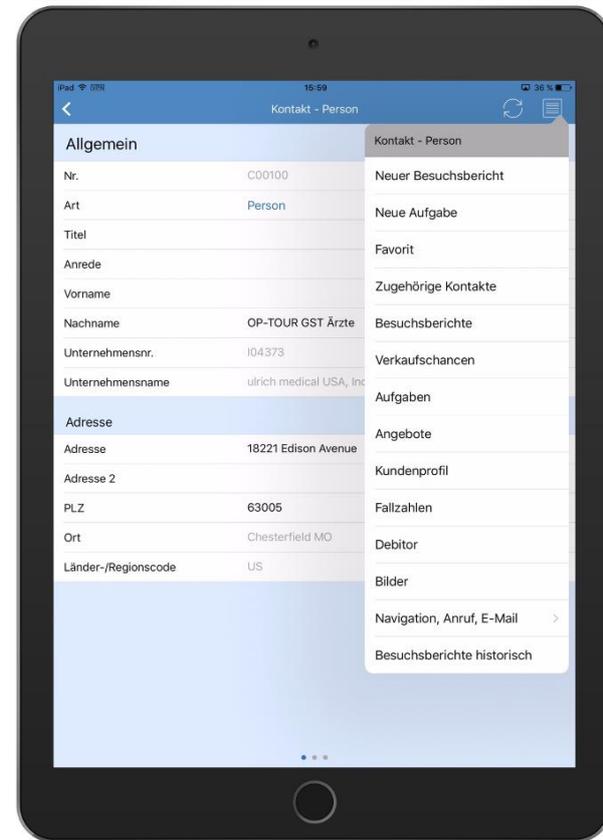
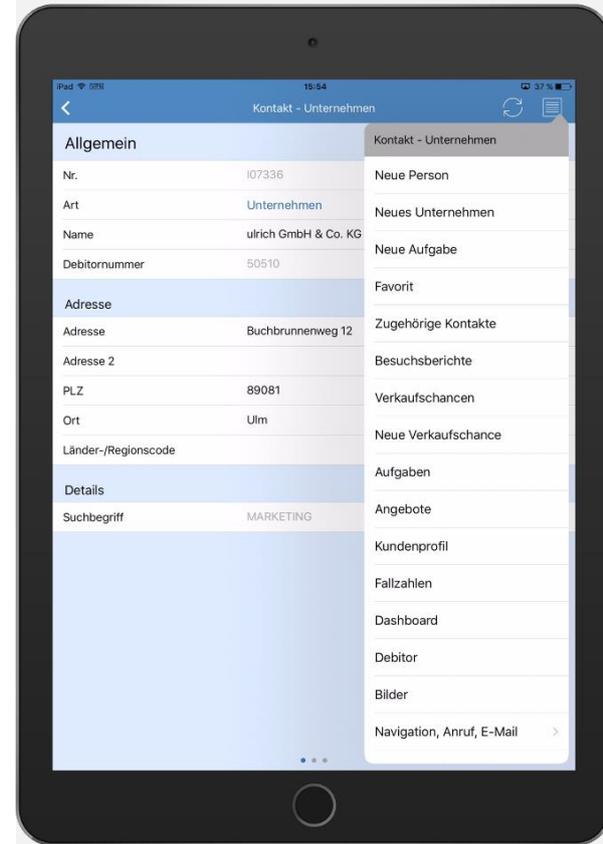
## Main Tasks of Anveo Mobile App

- Find information about customers and individual contacts
- View customer transactions of the last 12 months (e. g. purchases, deliveries and complaints) to prepare and, if necessary, to follow-up customer meetings
- Create meeting reports (questionnaire with predefined answer options and a few free text fields for easy evaluation)
- Store images, at congresses/events, for example, rapid contact creation by photographing the business card and passing it on to the inside sales department
- View case numbers for potential analysis of a customer

## Project Realization

Before implementing the Anveo Mobile App, the company's sales processes had to be sharpened and the Microsoft Dynamics NAV system had to be adapted accordingly.

Mr. Bruckert adds, *"The effort for pure app development was then very manageable. However, the project took some time to be completed as new demands were constantly being made on the sales side. They could be implemented quickly, thanks to the flexible setup of Anveo Mobile App. Before going live, the considerably higher data volume in the live system was a further challenge for us. But the Anveo support team has always been available to us promptly for a successful solution."*



Customized context menus on company and contact card – sales representatives can select the most important actions quick and easy, e. g. creating a meeting report.

## Summary and Outlook

The Anveo Mobile App enables the sales force of ulrich medical® to work with Microsoft Dynamics NAV system even without sufficient network coverage. They can now prepare customer appointments and create meeting reports directly afterwards.

*"Anveo Mobile is exactly what we were initially looking for", summarizes Mr. Bruckert. "Our sales department is very satisfied with the app. Only positive feedback has been received so far. In the next step, we will introduce sales opportunities and the associated tasks for our field staff. In addition, the Anveo Mobile App will also be used by our service staff in a slightly reduced form in the future. We are currently in the planning phase."*

## About Anveo

Anveo offers powerful add-ons for Microsoft Dynamics NAV: The 100% offline-capable [Anveo Mobile App](#) is the perfect solution for sales representatives or service technicians, and can also be customized to every other deployment scenario. [Anveo EDI Connect](#) offers a unique and comprehensive software to exchange data with or within Microsoft Dynamics NAV. With [Anveo Web Portal](#) you will get a simple, web based access to NAV for restricted user groups. It can be deployed as customer or employee portal. All Anveo Add-ons are fully NAV integrated and enable a self-sustaining handling and configuration. Anveo software supports Microsoft Dynamics NAV 2009 R2 to the current version.



*"In this project, I particularly remember the good cooperation with Anveo. We were always supported quickly and competently by the Anveo support team. There were no long waiting times, which had a very positive effect on the entire course of the project."*

Alexander Bruckert

Technical Project Manager,  
ulrich medical®

## Do you have any questions on this project?



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