



Endeavor4 Customer Story

Charlottetown

Municipal Government

Streamlining Municipal Procurement with Microsoft Dynamics GP & Fraxion



Customer Profile

Charlottetown is the capital of Prince Edward Island and a full-service municipality.

Its services include public works, water and sewer utilities, parks and recreation, planning and heritage, tourism and events, emergency services, and other resident services.

Goals

- Modernize purchase requisition and approval processes.
- Reduce manual work for the Finance team.
- Improve accountability and financial controls.
- Give employees and managers secure, remote access.
- Integrate procurement workflows with Microsoft Dynamics GP.

Industry

Municipal Government

CAN Region: PEI, Canada

Partner

Endeavor4

www.endeavor4solutions.com

Executive Summary

The City of Charlottetown needed to modernize its purchasing processes as part of its transition from an outdated Oracle ERP system to Microsoft Dynamics GP. Its existing approach relied on manual and partially automated processes that limited efficiency, accessibility, and visibility.

Endeavor4 helped the City select and implement Fraxion, an integrated procurement solution that introduced online purchase requisitions, email-based approvals, automated workflows, and stronger financial controls. The new system also gave employees and approval managers greater flexibility to complete purchasing activities remotely.

Business Challenge

As part of its ERP modernization, the City needed to replace its existing processes for purchase requisitions, approvals, purchase order changes, and related cost controls. These processes involved manual steps and limited automation, creating additional work for the Finance team.

The City required a secure solution with Canadian-hosted data, anytime portal access, email-based approvals, and close integration with Microsoft Dynamics GP. The system also needed to support greater accountability while making purchasing more accessible for employees and managers.

Solution

Endeavor4 helped the City evaluate its procurement options and implement Fraxion as an integrated extension of Microsoft Dynamics GP. Endeavor4 also worked with key City stakeholders to define and improve processes for requisitions, approvals, purchase order changes, receiving, and related financial workflows.

Employees could submit purchase requisitions online, automatically routing requests to the appropriate stakeholders for approval. Approval emails included budget comparisons, request details, change and approval history, and links to supporting information in Fraxion and Dynamics GP.



“With Microsoft Dynamics and the Fraxion portal, we have been able to greatly improve our remote work capabilities in support of our employees and front-line staff.”

Mark Lanigan, Manager of Finance

Business Benefits

The Fraxion portal gave City employees an accessible and intuitive way to submit purchasing requests remotely.

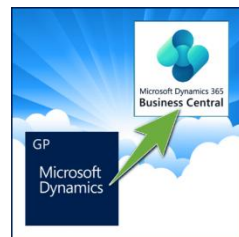
Automated purchase order creation, Accounts Payable entries, purchase order changes, and invoice reconciliation reduced manual work for the Finance team. Automated reporting, advanced search tools, and a complete transaction audit trail created additional efficiencies.

Approval managers also gained improved financial controls and the ability to review and approve requests online with the budget, history, and contextual information needed to make informed decisions.

Transformative Partnership

Endeavor4 worked with City stakeholders to evaluate procurement solutions and redesign processes for requisitions, approvals, purchase order changes, receiving, and related financial workflows.

By integrating Fraxion with Microsoft Dynamics GP, Endeavor4 helped the City establish a more automated and accessible procurement process while supporting its goals of accountability and responsiveness.



About Endeavor4

At Endeavor4, we strive to make every system smarter, every process simpler, and every decision yield success – because we strive to deliver everyday excellence for our clients. We are a North American Consulting and Microsoft Cloud Solutions Partner for business applications – we have the depth and breadth of capability to help each client unlock the full power of their AI, ERP, CRM, and Specialty Cloud Solutions.

True partnership and living our 4 core values of Knowledge, Integrity, Trust, and Accountability are the promises we make and keep. This means we never lose sight of what each of our clients' unique needs are. We don't push our own agenda – we listen, we advise, we focus on making your business applications work smarter and harder.

When choosing Endeavor4, you have a team that cares about realizing your goals as deeply as you do. We endeavor for excellence, and we are determined to deliver it, every day and in every way. We welcome the opportunity to endeavor for you. Boston, Chicago, San Antonio, Halifax, Montreal, Toronto, Edmonton, and Vancouver.

