



**Clients First**  
Business Solutions

**CASE STUDY**

**Modern Tools, Timeless Craftsmanship: A Success Story with M.L. Leddy's, Clients First Business Solutions, and Dynamics 365 Finance & Operations**

## **A Texas Legend of Handmade Craftsmanship Embraces New ERP Technology**

### **Handmade Boots Meets High-Tech Solutions**

M.L. Leddy began crafting handmade boots and saddles in the 1920s. His passion for quality and customer service laid the foundation M.L. Leddy's boot and saddle store, now a fourth-generation family business still known for its exceptional craftsmanship and personalized service. M.L. Leddy's has thrived as a Texas legend still crafting custom, handmade boots and saddles now also offering a curated selection of Western apparel and accessories.

As a business that has been following the same methodology of boot making for over 100 years, the CFO, Mike Morrison, realized they needed better technology as their retail operations continued to grow and diversify. Their brick-and-mortar store grew from boots to adding Western wear and an enviable lineup of custom hats, belts, precious metal buckles, jewelry, and accessories. Stores now include a full line of tailored and fitted men's and women's clothing from makers such as, Oxxford Clothiers, Copley, and M.L. Leddy's private label. Currently, there are two retail stores, one in the Fort Worth Stockyards and one in historic downtown San Angelo.

"We've always been about personalized service," shared Mike Morrison. "But as demand grew, we needed a system that could streamline our processes without sacrificing the personal touch we're known for." Leddy's recognized the need for automation and modernized processes to keep up with customer expectations and operational demands. Enter Clients First Business Solutions, a partnership that brought technological innovation to M.L. Leddy's without compromising its core values. It's a partnership that fit, well...like a custom M.L. Leddy's boot.

With a deep understanding of Dynamics 365 Finance & Operations and a tailored approach to ERP implementation, Clients First provided the expertise needed to integrate modern technology with tradition and craftsmanship seamlessly.

**M.L. Leddy's**  
*A Handmade Texas Legend* Est. 1922

### **M.L. Leddy's**

**Headquarters:** Fort Worth, TX  
**Founded:** 1922  
**Employees:** Approximately 70  
**Experienced 30% Operational Efficiencies**

### **How Leddy's Measures Success**

The fact that Leddy's has been in business for over 100 years is the first and as the most important measure of success.

#### **Other key performance indicators are:**

- Customer retention and referrals
- Industry and market recognition as a leader in a unique and endangered niche of retail sales
- Reputation for unmatched customer service
- Reputation for uncompromising quality and craftsmanship

## The Dynamics 365 Advantage

Dynamics 365 brought a range of benefits to M.L. Leddy's, enhancing everything from point-of-sale (POS) operations to back-office operations, reporting, and employee efficiency. The POS system, fully integrated into Dynamics 365, stood out as a gamechanger because the ease of capturing the sale directly relates to customer service, retention, and referrals. Unlike traditional retail systems, the Dynamics 365 POS allows M.L. Leddy's to process cash-and-carry sales and payments for custom orders in the same transaction at check-out, creating a seamless customer experience.

"There's virtually no other software that can handle these two processes at the same checkout lane," noted M.L. Leddy's CFO Mike Morrison, "Microsoft recognized this unique need and delivered a solution that's perfect for us."

After transitioning through multiple ERP systems—MAS 90, Navision, and Dynamics AX — the decision to upgrade to Dynamics 365 Finance and Operations (D365 F&O) was a natural evolution. The upgrade allowed Leddy's to take advantage of the new modern interface and a number of new features and functional enhancements including personalized user workspaces, advanced financial management features, and planning optimization. Leddy's also took advantage of the opportunity to move into the Microsoft Cloud thereby eliminating the need to maintain an expensive infrastructure on-premise. Other cloud benefits including automatic updates, improved data security, and scalability made this move an easy decision. Staying within the Microsoft ecosystem provided a sense of continuity and familiarity for the end users, ensuring that the transition was seamless for both management and staff. Familiarity with Microsoft Office tools like Excel and Word further solidified the choice, creating an intuitive and integrated user experience.

## Dynamics 365 POS Improves Customer Experience

One of the key benefits of upgrading to Dynamics 365 Finance and Operations is the D365 Store Commerce POS App that is fully integrated into D365 F&O and works seamlessly with real-time connectivity to the Retail and Commerce back-office module in D365 F&O.

- Advanced checkout features include the ability to include both cash and carry sales and custom/special order sales in the same transaction.
- Advanced lookup, editing, and delivery features for customer orders.
- Custom-tailored historical customer sales and order views.
- Improved user experience for pick-up order processing.
- Improved user experience for returns.



## Dynamics 365 F&O Constraint-based Product Configurator

The constraint-based product configurator in D365 Finance and Operations allowed M.L. Leddy's to automate their custom boot, saddle, and leather accessory orders from intake all the way through to manufacturing and delivery.

Since the manufactured products are all handmade, productivity is not about volumes or faster fulfillment. The automation of order processing and tracking, which were completely manual processes prior to AX and D365 F&O is where efficiencies were gained. Key selections required to uniquely identify each pair of boots, saddle, or leather accessory are captured at the POS. With the key data entered, the sales order is automatically created in the back office, the demand is picked up by Planning Optimization, and a planned production order is automatically generated - another critical component of order processing and tracking efficiency.

## Customized End-User Workspaces

Dynamics 365 F&O workspace feature, tailored with the help of Clients First Business Solutions, has been instrumental in improving business processes. Each user has a personalized workspace, focusing only on their necessary tools and data. This setup allows employees to jump straight into their tasks, reducing distractions and streamlining their daily operations.

## User-Friendly Navigation and Intuitive Design

The system's modern search functionality and intuitive navigation make it easy for staff to locate and interact with the data they need. Seamless integration with Microsoft Office products ensures that employees can move effortlessly between applications, enhancing overall productivity.

## Robust Reporting Capabilities

Dynamics 365 F&O delivers comprehensive and customizable reporting features. While all necessary data is readily available, Clients First helped customize the reports to fit specific business requirements in the areas of Financial Analysis, Sales Analysis, Inventory Valuation, Data Validation, etc. These customizations allow for quick access to actionable insights, empowering leadership to make informed decisions efficiently.

## Improved Collaboration and Visibility

The ERP system has significantly enhanced collaboration among employees by providing centralized data visibility. This has reduced the need for manual communication and enabled faster decision-making. Employees now have the tools to fulfill customer orders more effectively, leading to higher customer satisfaction.

## A Platform for Success

Implementing Dynamics 365 F&O has brought measurable improvements in operational efficiency. While precise growth figures weren't disclosed, the company acknowledges the system's role in optimizing workflows and supporting sustainable business growth. By choosing Dynamics 365 Finance and Operations the company has aligned itself with a robust, flexible, and scalable ERP solution. Whether it's enhancing day-to-day operations or planning for future growth, D365 F&O continues to support the company's vision and operational excellence.

## Upgrading the ERP Provided Efficiency that has Enabled Growth

With Dynamics 365, Leddy's gained a centralized system for managing operations, improving collaboration, and ensuring data accuracy. Key features like tailored workspaces and intuitive



navigation enabled employees to focus on what mattered most –serving customers and creating exceptional products.

Clients First’s expertise was instrumental in customizing Dynamics 365 to fit Leddy’s unique needs. “Their team understood our processes and guided us in making the right adjustments,” Leddy’s shared. “Whether it was configuring the POS or refining reporting features, Clients First proved to be a true partner.”

Reporting enhancements provide actionable insights that empower smarter decision-making. “The data is there; it’s just about putting it in a format that’s convenient and useful for us,” explained Leddy’s.

Despite adopting cutting-edge technology, Leddy’s commitment to craftsmanship remains unchanged. Each pair of boots is still handcrafted with the same care and precision that defined the brand over 100 years ago. Technology now supports this artistry, enabling the team to manage growing demand efficiently while maintaining their personal touch.

## Looking Ahead

As Leddy’s continues to evolve, they see opportunities for further enhancements, particularly in areas like production management, logistics, and e-commerce. While custom boot orders may never be fully online, the team is exploring ways to enhance their informational website and integrate advanced shipping solutions.

“Dynamics 365 has already made us more efficient and positioned us for growth,” said CFO Mike Morrison “And with Clients First by our side, we’re confident in our ability to keep delivering the quality and service our customers expect.”

## Conclusion

M.L. Leddy’s is a testament to the power of combining tradition with innovation. Through their partnership with Clients First Business Solutions and Microsoft Dynamics 365, they’ve embraced modern tools while preserving the craftsmanship and personalized service that define their brand. It is a story of advanced technology and enduring artistry, proving that even a Texas legend can thrive in the digital age.

## The Right Partner, The Right Fit, and No Surprises – Clients First Business Solutions

Clients First is more than a name, it is a culture at our company. Our goal is to provide value on every single project and service ticket. We know that ERP systems and your processes can be a complex combination that requires special attention and understand that it’s important to get you the right resource to help you in a timely manner.

Whether it’s an implementation run by your team with our assistance as needed, or full service engagements, we will provide any level of service you desire with an experienced team. We are ready to put your business needs first.