

CBSi Client Success Story

CBSi Client Success Story: Equipment Distributor

Client is a well respected Dallas-based distributor of electrical equipment and process controls, serving customers for over 62 years with 4 locations operating out of Texas, Oklahoma, and Louisiana, and distribution warehouses in each location.

Their previous accounting and distribution software, Real World, had been highly customized over the last 20 years to meet their unique needs but was no longer being supported. After searching for a year and a half for capable replacement software, they narrowed the list down to Prophet 21, Everest, FACTS, and Dynamics NAV. After multiple discovery meetings and presentations of Dynamics NAV by CBSi, it became evident that Dynamics NAV and the team at CBSi would provide them with the best opportunity to achieve their objectives with the least risk.

Dynamics NAV software was chosen primarily due to:

- NAV being the most user-friendly and easiest to navigate
- NAV having more in-depth information available
- NAV's ability to be customized beyond the realms of the previous software used

CBSi's team was chosen to provide the implementation primarily due to:

CBSi's understanding of the client's business and accounting requirements
Integrity of CBSi associates throughout the sales process

CBSi's team provided data conversion, customizations, implementation assistance, and training that resulted in the client's ability to meet the scheduled go-live date.

With their Dynamics NAV implementation, the client found that they could accomplish more with less employees. The main project benefits and returns on investment are outlined below:

Project Results

Sales:

- Sales quoting & order entry system supporting 18 sales people selling over 40,000 items
- Reduced customer ordering time by 50%: "Everything is a key stroke away."
- Increased accuracy and pricing by salespeople, due to quickly keying quotes directly into Dynamics NAV, therefore replacing handwritten quotes
- Access to full customer sales and pricing history is available at the touch of a button, making the sales process more efficient.
- Inventory quantity is updated when shipped, rather than at the invoicing stage.
- When a customer calls in, it is easy to access the shipping status of a package, with as little information as the customer's name.

Inventory & Purchasing:

- Cross-references to the customers' and vendors' item numbers saves time and improves accuracy with customer and supplier orders – which is also aided by unlimited extended item descriptions.
- Purchasing is greatly simplified, providing over 50% in time savings.
- Inventory costing is more accurate.
- Payable entries related to supplier purchase orders are now entered 75% more quickly.
- Selecting vendor invoices for payment can be done 2 or 3 times faster than before.

Financial Reporting and Accounting:

- Able to close the month out 8 times faster, from 2 days to just 2 hours.
- Invoicing & operations can continue into a new month without having to close the previous month
- Financial statements are time sensitive – can be queried live or printed anytime during the month
- The chart of accounts is 1/10th of the original size, since financial reporting of over 90 product categories among 8 different profit centers is greatly simplified with NAV's dimension capabilities.
- Paper consumption is about 1/9th. 3 truckloads of paper were being carried off to recyclers annually under the old system, compared to 1 truckload over a span of 3 years, currently.
- ½ a person in A/R has been freed up and reallocated since it now takes significantly less time to set up new customer accounts, record deposits, and handle other receivable entry functions.

System wide:

- Employees report experiencing company-wide improved efficiencies in finding customers, items, and other records within the Dynamics NAV resulting from unlimited, fast search features on all fields. This has improved their ability to quickly respond to customer needs with in-depth information quickly available in NAV – all at their fingertips.

Next:

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