Dealers Supply Works Faster, Improves Service with Ponderosa Document Management

It's been over 75 years since Jack K. Wherry purchased a locally owned business with the dream of turning that business into the leader and innovator of the building supply industry. That was when business was conducted on a handshake and when reputation and strong character built great business ventures. That was 1944.

Over the years, devotion to quality and innovation have been instrumental in the success of Dealers Supply & Lumber Co., Inc. This continues today through the VictorBilt brand, known to represent quality, style and value throughout the Southeast. Originally introduced in 1944, VictorBilt windows set a standard of craftsmanship that ran through all of our products, and this commitment to quality was essential to VictorBilt's growth and success.

Today, Dealers Supply & Lumber Co., Inc. manufactures and distributes a full line of wood, fiberglass & steel doors, plus a variety of wood, composite, clad and vinyl windows, as well as columns, shutters, and many other millwork items. The company and its energy efficient VictorBilt products are widely accepted and recognized as industry leaders in the Southeast.

Dealer's Supply has used CAI Software's Ponderosa enterprise resource planning (ERP) software to optimize their manufacturing and operate more efficiently and profitably for more than 15 years. Ponderosa's integrated, millwork-specific software tools use the latest technology and industry-best practices — and data from across Dealer Supply's business — to help them track production costs, ensure that the right stock is available at the right time, and meet promised delivery dates for production orders.

**Dealers Supply &
Lumber Co.**
105 Airport Road
Greenville, SC 29606

CHALLENGE:
Inefficient, Stand-alone Document Management System

In March 2018, it was becoming increasing apparent that the company's legacy, stand-alone document management system has outlived its usefulness and was costing the company more and more. Will Sykes, co-owner for Dealers Supply said, "We were experiencing lots of issues with just getting documents scanned in a timely manner. We had to manually scan in each individual document because the document management system was not integrated with our ERP software. It was worse for trying to include critical customer email correspondence, forcing us to print out every message and attachment and scan them to the appropriate location, an incredibly tedious, but necessary task."

"One of the absolute best things about DataView, and a feature that we have been using since our go-live, is the ability to easily import both emails and their attachments when we're working on special orders, dealing with issues after the sales or corresponding with customers. We've stored in excess of 230,000 documents. I'd estimate at least 10 percent of those documents being email correspondence between our sales people and their customers."

***Will Sykes
Co-Owner
Dealers Supply & Lumber Co.***

SOLUTION:
DataView ERP-Integrated Document Management

To address the problem, Dealers Supply turned to CAI Software and the DataView document management system.

"We knew that the tight integration between our Ponderosa ERP software and the document management system would solve most of our issues," Sykes said.

Within 90 days, the DataView software was installed and the system was up and running, working seamlessly with the Ponderosa ERP software and helping Dealers Supply work faster, more accurately, reduce costs, and provide the top-notch service they strived for.

DataView lets Dealers Supply's back office team easily store, manage and track electronic documents and images, and automatically indexes and stores all system-generated ERP transactions with related transactional detail in DataView. Convenient, easy-to-use importing, scanning and indexing makes it easy to import and access data at any time, from anywhere, on an enterprise-wide basis.

"Having all of the documentation in an easily accessible central location has been the main benefit to the system, and the level of integration between DataView and our Ponderosa ERP software lets our team quickly view customer and service-related documents from within the Ponderosa software," Sykes said.

The biggest beneficiary of the integrated document scanning has been Dealer Supply's sales office. "One of the absolute best things about DataView, and a feature that we have been using since our go-live, is the ability to easily import both emails and their attachments when we're working on special orders, dealing with issues after the sales or corresponding with customers," Sykes added.

At Dealers Supply, DataView is set up with several unique email addresses which sales staff use to import various types of documents, emails and attachments.

"In the two years that we've been using the DataView system, we've stored in excess of 230,000 documents. I'd estimate at least 10 percent of those documents being email correspondence between our sales people and their customers. Any information related to an order, including emails that are forwarded from customers with attachments like signed documents and pictures, are sent to a specific email address. Information related to quotes and purchase orders also have unique email addresses. This level of organization has been instrumental in helping us understand and review our processes and improve our service levels."

Looking ahead, Dealers Supply intends to equip its dispatch and delivery resources with mobile devices for remote, instant storage of proof of delivery signatures and images of delivered products directly into DataView.

Pat Gannon, Vice President for CAI Software said, "Emails are, at their core, documents that contain information. As such, they should be managed like all other documents. The combination of Ponderosa and DataView lets you easily capture and manage text and HTML-based email messages and their attachments for fast retrieval and improved collaboration among colleague. The cost savings are significant."

**For more information,
contact us at (800) 422-4782 or
www.caisoft.com/ponderosa.**

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