

Cardinal Carryor Gains Greater Visibility with Aptean Equipment ERP



Material handling dealership gets up to speed with new purpose-built solution

Industry

Equipment

Challenges

- » Working with outdated systems
- » Lacking analytics and reporting capabilities

Benefits

- » Increased efficiency in parts and accounting departments
- » Better visibility into availability tree
- » Inventory tracked for all service vans
- » More informed decision-making

Founded in 1947 and based in Louisville, Kentucky, Cardinal Carryor is a full-service material handling dealership that serves Kentucky and Indiana. Cardinal provides rentals, leasing and maintenance on both new and used equipment for brands like Clark, Crown, Doosan and Hoist.

Cardinal Carryor's sister company, Cardinal Integrated Systems, also in Louisville, handles warehouse planning, systems design, installation, project management, preventative maintenance and repair, plus a multitude of other industrial engineering services.

Cardinal Carryor is a third-generation family-owned and operated company. It has been the only authorized Clark forklift dealership serving Kentucky and Indiana since 1962 and has been an authorized Crown equipment distributor since 1983. In 2012, Cardinal added Golf Cart World to its mix in an effort to achieve diversity and increase profitability.

Making the Move for Modernization

Cardinal had been using a Unix-based software called MTA since 1978 and made the decision to change once MTA dropped support. In addition to this, Cardinal's legacy software wasn't good at getting information out of the system, making reporting difficult.

Though Cardinal employees liked the current software's ease of use, Brad Baker, president of Cardinal Carryor, knew it was time for a change.



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Brad Baker, President, Cardinal Carryor



“Our employees liked that you could change anything, anytime without an audit trail,” said Baker. “But if you wanted to know what was happening in the software...good luck.”

Baker began researching ERP vendors that had specific solutions for equipment distributors. On this list: DIS, Minitrac, EBS and Aptean Equipment ERP, which is built on the Dynamics Business Central/NAV platform.

Baker liked the partnership between Aptean and Microsoft and that the software integrated with other Microsoft products like Excel and Outlook.

“With Aptean Equipment ERP and Microsoft Dynamics, we have full assurance that our investment can be leveraged for as many years as we need it,” Baker explained.

Improvements Across the Organization

After deciding to go ahead with Aptean Equipment ERP, Cardinal made the initial decision to implement the system themselves but quickly realized that they needed the expertise and experience of the solution provider. Aptean’s implementation team traveled to Louisville to work with Cardinal on the project and promised Baker and his team that they would make Go Live happen on time and on budget.

“They got us live, and it was tremendously smooth,” Baker said.

According to Baker, Aptean Equipment ERP has improved Cardinal’s efficiencies so drastically that the company has been able to cut costs dramatically in their parts and accounting departments. The two sister companies were also able to effectively process more orders with the same number of staff, increasing overall productivity.

“Reporting is a huge thing within Aptean Equipment ERP,” says Baker. “Before we implemented the new solution, our staff didn’t have exact information on inventory turns, cycle counts, automated replacements and other data critical to making good business decisions.”

Within Aptean Equipment ERP's rental functionality, Baker says the availability tree is a big improvement, making it easy for people outside the rental department—such as sales staff—to easily see what equipment is available and what is not. Cardinal is also utilizing Aptean Equipment ERP's built-in customer relationship management (CRM) system for contact management by its sales team.

Baker is highly impressed with Aptean Equipment ERP's ability to plan the inventory in Cardinal's service vans in the same way it plans inventory in a warehouse. Before implementing the new solution, Cardinal would manually calculate the inventory in each of its service vans. Now, the process is automated and visibility into each truck's inventory is clear.

Cardinal's number one goal in the near future is to have a system in place that can allow multiple resources to work on a single service order at once, with up to 10 employees on one job. Baker and the team at Cardinal are hoping to integrate a system like MobileFrame with Aptean Equipment ERP to achieve this.

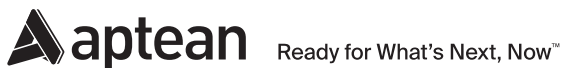
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