

Ballard Hardware & Supply Company

Industrial Distributor Uses Epicor BisTrack to Modernize and Streamline Order Processing and Fulfillment

Company Facts

- ▶ Location: Seattle, Washington
- ▶ Industry: Lumber and Building Materials
- ▶ Specialty: Industrial Hardware
- ▶ Number of Locations: 1
- ▶ Website: www.ballardindustrial.com



Success Highlights

Challenges

- ▶ Outdated technology kept business from giving top-notch customer service
- ▶ Order processing and fulfillment needed to be refreshed

Solution

- ▶ Epicor® BisTrack™

Benefits

- ▶ Professional customer-facing communication
- ▶ Streamlined order processing and fulfillment of complex, staged orders
- ▶ No overtime, no added staff during busy season
- ▶ Real-time financial snapshot
- ▶ Platform for ongoing efficiency improvement

Ballard Hardware and Supply Company is an institution in the Seattle area. Now in its sixth decade of operation and second generation of owner/operators, Ballard is an industrial distributor that continues to earn its reputation as a reliable purveyor for the marine, industrial and construction trades. Since 2008, Ballard has been using Epicor BisTrack software to modernize and streamline order processing and fulfillment.

"Above all, we're a service and sales company," says Rory Martin, retired IT director at Ballard Hardware and Supply Company. "To do that, you can't be boxed in by your software. BisTrack software allows us to remain flexible and give customers what they want."

Ballard Hardware's customers span the range from the Seattle-based fishing fleet that supplies about half of the fish to the continental US, to the Alaskan canneries and freezer processing ships that order maintenance materials from Ballard, as well as an increasing number of related industrial and commercial customers.

BisTrack software order management ensures Ballard doesn't "miss the boat"

Jennie Agard, a business process manager at Ballard Hardware, describes the complexity of their large orders from Alaskan canneries and freezer processing ships: "They'll start giving us orders in October or November, and give us a

date in February or March to load the barge that will take it up north. For us, saying that we've missed the boat is quite literal. If we don't get that order to them by the time the barge leaves the dock, we've lost the order and possibly a customer."

By the time the order ships, it could be 200-300 lines. "They're ordering pallets and pallets of material with long lead times," explains Doug Freyberg, vice president at Ballard Hardware. "Sometimes we don't want to take the item from our current stock. We want to add that quantity to our next stock order. BisTrack software allows us to handle orders that way."

"BisTrack software also allows us to create work orders that have multiple processes attached to each line item, and to generate purchase orders to multiple vendors. For example, we send pipe out to be cut to length, galvanized and turned," Agard explains. "This used to be a painstaking procedure to build the work order, but the BisTrack solution manages it all now."

Ballard Hardware starts picking the order, and stages it ready for loading. "BisTrack software lets us mark an item as 'picked'. While we haven't actually sold the item yet, it's no longer on the shelves," Agard explains. "Then we mark the order as being staged in a certain place."

"We're in a fast-paced period right now in receiving in our warehouse," Martin points out during our conversation in February. "We have piles of incoming freight and it's critical to fulfill those big orders and stage them without affecting our current business. Yet, there seems to be a calmness. We're able to handle it quite well. BisTrack software has given us the ability to go home at the end of the day with a clean desk."

Complex products, pricing and taxation a challenge for traditional DMS/POS systems

Ballard Hardware has about 30,000 SKUs for stock items, and another 45,000 SKUs of non-stock items—either manufactured products or items from OEM catalogs. Simply finding the correct product was daunting in a previous distribution management software (DMS) package they had tried—and failed—to use. "You had to get the description exactly right in exactly the right order to find something," Freyberg recalls.

"The first time we saw the BisTrack software lookup functionality, we were blown away," Freyberg remarks. "You can search by category and filter down to the product you want. Our warehouse manager who was on the Infor system prior to this knew that the search feature would be a phenomenal tool for sales."

Martin concurs. "It's not every system where you can find a product in 20 different directions. I get a 'gee whiz' about once a week."

BisTrack software also allows Ballard Hardware to set 4-decimal costing so that, like many industrial distributors, they can purchase small bulk items at less than a penny each. But Martin really marvels at how BisTrack software is helping Ballard manage taxes. "We live in a state that has more tax types than streets in the city of Seattle," he says, describing that the tax rate depends on whether the shipment is destined within metropolitan Seattle, to another city or county, or out-of-state; whether the vessel is a tax-exempt fishing boat or a common carrier; whether the products are to be consumed on the vessel or delivered whole. "Managing the various types of tax, and types of customers and the taxes that are applicable to them, would be a nightmare without a product as flexible as BisTrack software."

"As you learn to use BisTrack software and understand how it can help you, it's phenomenal. For the first time, I've been able to pull up financials on a daily basis and really see how we're doing."

Doug Freyberg, Vice President | Ballard Hardware & Supply Company

Management of sales orders critical to success

Prior to using the BisTrack solution, Ballard Hardware prepared handwritten invoices using 5-part carbon forms, which customers often struggled to read. The complex orders resulted in a lot of paperwork being routed to various functions involved in fulfilling the order, with followup needed throughout the long lead time. "Every salesman's desk was piled high with papers, and they were staying late completing the day's paperwork," Agard recalls.

Martin agrees: "The amount of time they would spend rifling through drawers looking up past history was unbearable. The paperwork on desks was monumental. I don't see that anymore."

"Within 6 months of going live on BisTrack software, the salesmen were out the door every night at 5 o'clock and there were no papers left behind," says Agard. "We've just had our busiest 6 months ever, without adding people, without overtime, without masses of paper piling up."

Agard credits the Sales Dashboard they created in BisTrack software with helping salesmen prioritize their work and monitor their orders. Each salesman has a Dashboard showing their orders and flagging orders that need attention. "The guys are constantly monitoring. They can click on a line and open the order, find out the details and contact the customer. It allows them to be proactive," says Agard.

Information leads to efficient use of personnel and resources

"BisTrack software has allowed us to adopt a more efficient way to use our personnel and our resources, whether they be cash or inventory resources," remarks Greg Hartje, vice president at Ballard Hardware. "We can get rid of wasted time and effort. It's been a boon for us."

Hartje says that responding to sales, inventory and delivery inquiries is much faster now with BisTrack software: "The speed of lookup, the versatility. BisTrack software has made our organization a lot more efficient."

Agard also describes the role-based Dashboards they created to display information essential for each job function on an hourly, daily, weekly or monthly basis. "We discovered that just by putting information in front of people, reminding them what they needed to focus on, they started paying attending and acting on it," Agard says. "The efficiency is amazing."

Easy access to data streamlines management functions

Freyberg also appreciates BisTrack software's ability to sort and group lists and SmartViews. "When I'm looking at the status of orders or invoicing, I'll sort and look for the ones where 'Approval' is 'none' and those are the ones I have to approve. Or I'll grab the 'Created by' or 'Margin' to take a closer look at suspected problem areas," Freyberg explains. "As you learn to use BisTrack software and understand how it can help you, it's phenomenal."

"For the first time, I've been able to pull up financials on a daily basis and really see how we're doing. We're looking at actual snapshots of inventory, instant order information, and we're putting the pricing knowledge that was in people's heads into a system," says Freyberg. "BisTrack software has allowed us to present a very professional organization externally," remarks Freyberg.

Improved customer service strengthens industrial distribution business ties

"We also want to support what we sell," adds Martin, explaining that they have recently achieved factory repair authorization from several OEMs. "BisTrack software allows us to cost and bill services in our repairs facilities."

"BisTrack software has been a boon for us. It has allowed us to adopt a more efficient way to use our personnel and our resources, whether they be cash or inventory resources. Our customers appreciate the things we can do for them now. It's made it easier to deal with us."

Greg Hartje, Vice President | Ballard Hardware & Industrial Supply

The BisTrack solution also makes it easy for Ballard Hardware to respond to ad hoc requests for information from customers. Martin recounts a request from a customer who wanted a report of all their orders, complete with signatures. "BisTrack software and Crystal Reports came to the rescue. We want to retain business and it's all about customer service."

"Our customers appreciate the things we can do for them now," says Hartje. "It's made it easier to deal with us, and it's made our life a lot easier too."

Ongoing enhancements offer a good return on investment

Ballard Hardware has continued to add to the original BisTrack system they implemented in 2008.

Ballard Hardware recently decided to have BisTrack software hosted by Epicor. Freyberg comments: "It's going to give us peace of mind and security that our data is being backed up properly. And it will allow our IT personnel to focus more on business processes."

They also recently integrated signature capture directly onto invoices to eliminate the need to scan collection notes. They now tokenize credit card transactions to protect customers' credit card information. They streamlined Accounts Payable so that bills are immediately scanned and approved on-screen, as are checks. And they recently purchased Web Track and are looking into Mobile Delivery. "BisTrack software isn't sitting still," Freyberg comments. "It offers a lot of innovation that is value-priced and a good return on your investment."

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, [connect with Epicor](#) or visit www.epicor.com.



Contact us for more information on Epicor Products and Services

+1.888.463.4700 LBM@epicor.com www.epicor.com

Corporate Office
804 Las Cimas Parkway
Austin, TX 78746
USA
Toll Free: +1.888.448.2636
Direct: +1.512.328.2300
Fax: +1.512.278.5590

Latin America and Caribbean
Blvd. Antonio L. Rodriguez #1882 Int. 104
Plaza Central, Col. Santa Maria
Monterrey, Nuevo Leon, CP 64650
Mexico
Phone: +52.81.1551.7100
Fax: +52.81.1551.7117

Europe, Middle East and Africa
No. 1 The Arena
Downshire Way
Bracknell, Berkshire RG12 1PU
United Kingdom
Phone: +44.1344.468468
Fax: +44.1344.468010

Asia
238A Thomson Road #23-06
Novena Square Tower A
Singapore 307684
Singapore
Phone: +65.6333.8121
Fax: +65.6333.8131

Australia and New Zealand
Suite 2 Level 8,
100 Pacific Highway
North Sydney, NSW 2060
Australia
Phone: +61.2.9927.6200
Fax: +61.2.9927.6298

The contents of this document are for informational purposes only and are subject to change without notice. Epicor Software Corporation makes no guarantee, representations or warranties with regard to the enclosed information and specifically disclaims, to the full extent of the law, any applicable implied warranties, such as fitness for a particular purpose, merchantability, satisfactory quality or reasonable skill and care. This document and its contents, including the viewpoints, dates and functional content expressed herein are believed to be accurate as of its date of publication, March 2013. The results represented in this testimonial may be unique to the particular user as each user's experience will vary. The usage of any Epicor software shall be pursuant to the applicable end user license agreement and the performance of any consulting services by Epicor personnel shall be pursuant to applicable standard services terms and conditions. Usage of the solution(s) described in this document with other Epicor software or third party products may require the purchase of licenses for such other products. The results represented in this testimonial may be unique to the particular user as each user's experience will vary. Epicor, the Epicor logo, and BisTrack are registered trademarks or trademarks of Epicor Software Corporation in the United States, certain other countries and/or the EU. All other trademarks mentioned are the property of their respective owners. Copyright © 2013 Epicor Software Corporation. All rights reserved.