



J.H. Wright & Associates Inc.

Distributor transforms operations with Epicor technology and consulting

Company Facts

- Location: Daphne, AL
- Industry: Fluid handling solutions
- Number of Employees: 48
- Web site: www.jhwright.com



“Web-based consulting is incredibly easy, and we can schedule just as much time as we need to cover exactly what we want to learn. We are really stressing accuracy and problem solving, and Epicor Prophet 21 is integral in all of it.”

Randi Patterson, Operations Manager / System Administrator | J.H. Wright & Associates Inc.

Randi Patterson, Operations Manager/System Administrator, Diana Petersen, Senior Accountant, and Tim Goolsby, Production & Quality Manager, make up the backbone of the Epicor Prophet 21 enterprise resource planning (ERP) process development and troubleshooting team at J.H. Wright & Associates Inc., a fluid handling solutions distributor based in Daphne, Alabama. “We are both loved and hated by our users, depending on if we’re solving problems or pushing change, but we manage to stay a pretty happy family,” observes Patterson. “Among the three of us, we can solve most of our user issues, but we can’t know everything about everything.”

When this happens, they often use Epicor’s Web-Based Consulting service to work with an Epicor expert. “It’s incredibly easy, and we can schedule just as much time as we need to cover exactly what we want to learn,” Patterson says.

A convenient option

Like traditional consulting, Epicor’s Web-Based Consulting helps distributors such as J.H. Wright & Associates streamline their daily operations and maximize the use of their technology solution. However, instead of working in person with an Epicor expert, they engage in consulting sessions via the Internet. Using an Internet browser, they log on to a specified Web site to gain hands-on experience with their Epicor Prophet 21 solution and discuss issues with a consultant.

When they invest in Web-Based Consulting, distributors can schedule meetings in hour-long—instead of day-long—increments. “This works really well when we

Success Highlights

Challenges

- Help an Alabama-based wholesale pumps distributor and service provider hone its Epicor solution knowledge and improve its processes

Solution

- Epicor® Prophet 21® and Epicor Professional Services Web-Based Consulting

Benefits

- Hour-long sessions increase flexibility: learn what you want, when you want
- Save money on travel and other expenses associated with onsite consulting
- Convenient and easy to use
- Support for continuous improvement

just need a little extra help to get to the next level in our solution,” Patterson says. “The training can be very targeted; for example, we recently used it to help us fix an issue we were having with a complex Crystal Report. We had created the report, but needed some help making a few of the details work correctly. Once finished, all sorts of sales, order, and customer reports were based off that same one. Our next step is to adapt it to show on large monitors in our shops. They will automatically refresh to show order statuses as well as those constantly changing priorities. It was well worth the two hours of consulting!”

She adds, “The Web-based option is also useful for training upper management who may not want to sit through a class. They often have specific questions about things like Executive Metrics, and with one-on-one consulting, it’s interactive and all about us.”

While Patterson notes that traditional consulting certainly has its place in business—namely, for larger projects like audits or when groups of employees need training—she says that she would definitely recommend Epicor Web-Based Consulting to other distributors. “This is so convenient, and it saves us the travel costs we pick up when a consultant comes onsite,” she explains. “The Epicor consultants are very knowledgeable and pleasant, and taking advantage of this type of consulting has been of great benefit to our company.”

Prophet 21 and “Order Champions”

According to Patterson, “Since implementing the Epicor Prophet 21 solution in 2004, we have transformed our operations by examining and refining every process. We have also been able to empower our employees and encourage participation in continuous improvement. Epicor Prophet 21 is software designed for that.

“We eliminated the need for some positions and combined others, saving money,” she continues. “We have also experienced a more transparent system with reporting, and implemented philosophies designed around the continuously improving modules of the Prophet 21 solution.”

For example, the company created an “Order Champion” philosophy that assigns responsibility, empowers inside sales, and guides orders “from cradle to grave.” At J.H. Wright & Associates, an inside sales “Order Champion”:

- Gets the order on the system
- Follows an order from start to finish
- Receives orders from outside sales and customers
- Follows up on incomplete or inaccurate information
- Confirms pricing
- Starts credit application process
- Orders materials
- Develops relationships with customers
- Develops relationships with suppliers
- Follows up on POs
- Handles returns
- Communicates with accounting, inventory, management, and the system admin as needed
- Takes responsibility for completion of the order
- Can make the order move!

This fills gaps and helps overcome barriers to completion. It also alerts management to specific orders that need help in the process (which can take one day to months to complete, depending on their complexity).

Adds Patterson, “We also have developed a color-coded folder system for repairs and service that utilizes the forms and systematic way that the Prophet 21 solution works through these orders. This efficiency saves us time and money, and helps us to track ‘escapes’ (mistakes) and use those flags as opportunities for improvement. Another thing we do is create orders that are ‘note heavy.’ What I tell my Order Champs is: every order tells a story, and that story must have enough information so that even a layperson can understand what went on with it. This is especially true with our service and repair orders. The structure and flow of the Prophet 21 system, including its dates, note fields, and audit trails, make this possible. We want to be able to look at an order five years from now and know what we sold or repaired, and how we did it.

“Today, we are really stressing accuracy and problem solving, and Epicor Prophet 21 is integral in all of it,” she concludes.

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Randi Patterson, Operations Manager / System Administrator

About Epicor

Epicor Software Corporation is a global leader delivering business software solutions to the manufacturing, distribution, retail, and service industries. With more than 40 years of experience, Epicor has more than 20,000 customers in over 150 countries. Epicor solutions enable companies to drive increased efficiency and improve profitability. With a history of innovation, industry expertise and passion for excellence, Epicor inspires customers to build lasting competitive advantage. Epicor provides the single point of accountability that local, regional, and global businesses demand. For more information, visit www.epicor.com.



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