

# CHADWELL SUPPLY

TAMPA, FL | CHADWELLSUPPLY.COM

## The Company

Tampa, Florida-based Chadwell Supply is the number one supplier of maintenance and flooring products in the U.S. When multi-family residential property owners need to fix plumbing or replace lights, floors, counter tops, and other items on their properties, they call Chadwell Supply and receive new products the next day. Chadwell employs 1,000 people at sixteen locations, and the needs of property owners in over 100 major metropolitan areas. They've recently been voted Best Place to Work by the National Apartment Association.

## The Challenge

When the company was started in August 2007, it needed to find a distribution operations software solution to handle its growing business.

"We process close to 1,000 sales orders a day, so we need powerful software to handle that volume," says Robert Chadwell, the organization's Owner/Director of Operations.

Chadwell also wanted to be able to customize its order workflow, which is essential to the company's business. "We wanted an easy way to put an order into the system and track it all the way through to invoice using business rules we've set up, or go look at a customer's order history, or quickly view the Accounts Receivable tab," says Chadwell.

The company also needed an easy method of planning for product inventory. "Our average order is \$580, but for larger apartment community renovations where the



customer needs to change plumbing, lighting, cabinets, and other things in multiple buildings, the order size could jump to \$30,000," Chadwell remarks. "We needed a way to keep track of all that inventory and predict when it was needed."

## The Solution

CAVALLO SALESPAD. As Chadwell prepared to implement Microsoft Dynamics GP, the company's technology partner recommended that Chadwell also install Cavallo SalesPad as their on-prem solution, an all-in-one order entry, CRM, and sales management software solution that seamlessly integrates with Dynamics GP.

"Our partner NextDyn told us we didn't want GP without SalesPad, and they were right," recalls Chadwell.

With SalesPad, the Chadwell Supply team was able to leverage a one-step screen for placing sales orders, making order entry fast and easy. An improved workflow sweetened the deal further, by providing a customizable order management process that customers can use to route documents through their business process. The team was also able to speed up operational processes across their entire workflow by putting order tracking, customer history, CRM, and other functionality in one place.

"SalesPad's greatest strength is its workflow," says Chadwell. "That alone made it worth it."

### Powerful workflow capabilities

Taking advantage of the strength of Dynamics GP and the power of SalesPad, Chadwell Supply has highly configurable built-in workflow functionality that makes order entry and tracking simple.

"SalesPad workflow is very powerful, and we use it for everything here. It allows us to bend GP to our business rules," says Chadwell. "For example, if a customer owes us money and they're 60 days overdue, we create a rule for that in SalesPad and the order is automatically sent to account review — this gets us paid more quickly. SalesPad is the grease that allows the different parts of our business to work smoothly together."

Chadwell has also experienced unexpected benefits from using workflow in SalesPad. "Inventory forecasting is a really great example of our company using SalesPad workflow for things other than order entry and delivery," says Chadwell. "We created quotes that contain all the products that will be used in a renovation project, and we used the document data and the required ship dates to denote the beginning and end of the project. We then created queues in SalesPad, and we put the quotes into those queues in workflow. Now, we can report off those quotes and adjust purchase order quantities based on the quotes in the queues. This is one example of how SalesPad workflow is so powerful — we can use it for something it wasn't necessarily designed for."

### Pricing features that improve the business

In addition to workflow, Chadwell is employing some of the pricing functionality in SalesPad, such as the customer discounts feature. With this feature, users can set up discount percentages in SalesPad, which can be associated with a specific customer or group of customers in the Pricing module on the customer's information card. The appropriate discounts are then applied to all sales documents.

"We've been able to take advantage of the pricing features in SalesPad to make our business better," says Chadwell. "When SalesPad introduced customer discounts, it helped us structure sales programs that attracted national customers, and it allowed us to create a new incentive program for other customers to give them a percentage discount on certain product categories that they buy from us. That was a really nice business driver for us."

### Valuable technical support and product knowledge

Chadwell also benefits by paying for annual enhancement on SalesPad, which allows for software upgrades, technical support, and other advantages.

"We don't upgrade as frequently as some companies might, but we still pay for enhancement because of all the other things that come with it," says Chadwell. "The technical support, for example, is worth the payment alone."

Perhaps the greatest benefit is the Cavallo staff's extensive product knowledge. "With Cavallo, it's really about the people and not just the product," Chadwell says. "When we have questions about improving our business processes, we can call them and talk to people that not only know our business, but also know the product. And because they understand the way our business works, they can translate that into the way the software works. That's what makes Cavallo SalesPad so valuable."

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Robert Chadwell, Owner & Director of Operations