



THE SOURCE SEES GREEN FROM ERP SOFTWARE TRANSITION

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~ Matthew Larson, Director of Operations



CLIENT SUCCESS STORY

Company Facts:

- Location: Ogden, UT
- Industry: Irrigation
- Previous Provider: NetSuite
- Website: thesource-online.com
- Buying Group: Virtualrain

Features Highlighted:

- Fully-integrated CRM
- Warehouse Management
- Container Management

Benefits Gained:

- Increased revenue
- Reduction of labor and costs
- Quick return on investment
- Error-free warehouse operations
- Decision-driving analytics

Speed and efficiency gains from Inform ERP Software allows The Source to improve customer service and grow sales.

For nearly 25 years, The Source, Inc. has been the irrigation industry's leading supplier of original equipment manufacturer (OEM) and after-market repair parts, diagnostic tools and troubleshooting devices. With approximately 7,000 product SKU's The Source needed a robust Warehouse Management System to automate distribution and manage the light-manufacturing processes.

"We wanted a product that handled multiple workflows, but we couldn't find what we needed in any existing Enterprise Resource Planning (ERP) systems," said Matthew Larson, Director of Operations, The Source, Inc. "Our former solution, NetSuite, didn't allow us to perform specific functions, such as tracking inventory, imports and cycle counting. We just didn't think our previous software did a strong enough job at distribution management."

In addition, The Source's operations team also needed a solution that consolidated orders and allowed for easy tracking from the point of procurement through the point that it shipped to the customer. This feature was especially relevant to help manage containers for The Source's import business.

"Due to the complexity of our business, we thought we would have to spend a lot of money on a solution that would align with all of our needs," said Larson. "All of our research was leading us to really big, industrial kind of packages—like an Oracle kind of a system. The budget for a software like that was just way more than we had allocated for the project. We were introduced to DDI System through our buying group, Virtualrain, and found

that Inform had the variety of functionality we needed at the right price point. It was a surprise that was even possible!”

Features That Fit Business Needs

In evaluating the WMS portion of the software, Larson and his team found two primary features stood out:

1. Container Management: DDI's WMS allows for easy management of import containers, giving purchasing staff the ability to build large orders while defining specific container quantities. The system also allows the team to view the status of containers, including expected arrival dates, estimated totals and reference numbers.
2. Efficiency: The speed of quote generation, order entry and fulfillment would allow the warehouse team to turn orders more quickly, enabling them to reduce labor and reallocate staff to other areas of focus within their business.

Transition is “a Piece of Cake”

As The Source headed into implementation of Inform with WMS, the project moved along seamlessly. Having performed similar conversions in the past, Larson expected data switch to be a challenge. He was surprised by the speed and ease of the DDI transition.

“The transition to Inform was the easiest we’ve done, because the data conversion was so clean from one system to the other. It really was a piece of cake,” said Larson. To assist with the transition, trainers from DDI provided in-depth instruction on the functionality and key



“The gains since implementing Inform have been so substantial, the system paid for itself in just 18 months.”

features of the Inform system before the go-live. “The implementation and phased transition approach was fast, efficient and well-outlined. We knew the software would be great. We could see DDI brought an attention to detail that made converting our data pretty seamless. We’ve never experienced an implementation quite like that.”

“The training we received was excellent,” said Larson. “DDI’s team was very knowledgeable and helped us through the new workflow. There are always challenges, but those were related to our team modifying habits and adopting them to the new system. We worked through those quickly and found it very easy to work with the software.”

The Difference a Few Years Makes

Just a couple years after transitioning to Inform, Larson recognizes the efficiencies gained were absolutely worth the investment. In fact, the gains have been so substantial, Larson says the system paid for itself in just eighteen months.

“Streamlined order entry and processing have allowed us to reduce staff,” he said. “Because we now have the ability to run analytics, view performance, order speed and product builds, we were able to allocate a resource to a customer service manager role—something we haven’t had for seven years.”

“Prior to Inform, everyone was so busy performing basic tasks that no one had the capacity to use a system to manage a team,” he continued. “We’ve been able to put someone into a management role and use the tools within Inform to increase accountability. And she will now also be able to build an inside sales team to perform the CRM that we’re going to step into.”

With aggressive sales growth goals in place, Larson and his team are looking to harness the full potential of Inform’s CRM capabilities. Acquiring new lines will also enable them to reach sales targets, something that Inform easily accommodates.

“When we take on a new line, we load the customer and product database along with some sales history into Inform so that we can use the dashboards to forecast and start purchasing inventory,” said Larson. “It’s really important to have software support the product line so you don’t lose sales.”

Inform has optimized processes throughout all of The Source’s business, allowing both the company and its customers to win. As they continue to grow, Larson and his team feel confident that Inform was the right product for the upward trajectory.