



Cardinal Carryor

Gains Greater Visibility into Its Availability Tree

CASE STUDY

Customer Details

Cardinal Carryor had been using a legacy software since 1978 when the software company dropped support of the system and subsequently went out of business. Cardinal chose EquipSoft because of its robust reporting capabilities, inventory management functionality, and customer relationship management (CRM) feature.

Industry

Material Handling Equipment

Aptean Solution

Aptean EquipSoft ERP

Challenges

- Up-to-date software solution
- Analytics and reporting capabilities

Benefits

- Increase efficiencies in its parts and accounting departments
- Create better visibility into its availability tree
- Track inventory of each of its service vans
- Make better, more informed business decisions

Founded in 1947 and based in Louisville, KY, 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.

The Challenge

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

The Solution

Baker began researching ERP vendors that had specific solutions for equipment distributors. On this list: DIS, Minitrac, EBS, and EquipSoft, which is built on the Dynamics Business Central/NAV platform. Baker liked the partnership between EquipSoft and Microsoft and that the software integrated with other Microsoft products like Excel and Outlook. "With EquipSoft and Microsoft Dynamics, we have full assurance that our investment can be leveraged for as many years as we need it," Baker explains.

After deciding to go ahead with EquipSoft, Cardinal made the initial decision to implement the system themselves, and quickly realized that they needed the expertise and experience of the EquipSoft team. EquipSoft'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 says.

The Benefits

According to Baker, EquipSoft 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 able to effectively process more orders with the same number of staff, increasing overall productivity. "Reporting is a huge thing within EquipSoft," says Baker. "Before we implemented EquipSoft, our staff didn't have exact information on inventory turns, cycle counts, automated replacements and other data critical to making good business decisions."

"We've been able to achieve significant cost reductions in the parts and accounting departments by using EquipSoft."

Brad Baker
President

Within EquipSoft'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 EquipSoft's built-in customer relationship management (CRM) system for contact management by its sales team.

Baker is also highly impressed with EquipSoft's ability to plan the inventory in Cardinal's service vans in the same way it plans inventory in a warehouse; before EquipSoft, 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.

The Future

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 EquipSoft to achieve this.

For more information on the EquipSoft, email us at info@aptean.com.



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