



CUSTOMER SUCCESS STORY

**CUSTOMER**

CFM Equipment Distributors, Inc.

**INDUSTRY**

HVAC Wholesaler

**LOCATION**

Sacramento, California

**Number of Locations**

Two

**Number of Employees**

38

**SYSTEM**

Sage MAS 200

**Modules in Operation**

- General Ledger
- Accounts Payable
- Accounts Receivable
- Payroll
- Inventory Management
- Sales Order
- Library Master
- Bank Reconciliation
- Custom Office
- e-Business Manager
  - .inquiry
  - .order
- Purchase Order
- Visual Integrator
- Extended Solutions
- Credit Card Processing

## CFM Heats Up e-Business With Sage MAS 200

Staying cool in California’s steamy summers can be a challenge. So can staying warm in cold winters. CFM Equipment Distributors has an ideal niche—selling heating, ventilation, and air-conditioning (HVAC) equipment to independent contractors throughout Northern California and Nevada.

Business is booming, too. CFM has won American Standard’s Distributor of the Year Award four times, as well as its Outstanding Performer Award.

### Warming Up Revenues

Always searching for improvement, however, the owners of CFM set themselves a lofty goal—dramatically increase sales without adding staff in customer service. They called their Sage Software business partner for ideas.

“We’d used Sage MAS 200 ERP for at least a decade to run our entire business,” says Joe Souza, vice president of operations. “And we’d been loyal users over the years, because Sage MAS 200 is a fully integrated system, and has helped keep our employee-to-sales ratio low. So we approached our



Sage Software reseller and asked for ideas on improving business-to-business volumes over the web. When they showed us the e-Business Manager modules, we knew we’d found the answer.”

### Cool Competitive Edge

CFM Equipment Distributors uses Sage MAS 200 to manage everything from its inventory and general ledger to accounts payable and bank reconciliation. Now, in addition, the system has provided an end-to-end e-commerce solution, complete with online ordering, availability checks, allocation, pricing, and status checks—all 24-7.

**CHALLENGE**

Expand business without adding staff in customer service.

**SOLUTION**

Sage MAS 200 with full complement of e-commerce modules including e-Business Manager, .inquiry, .order, and Credit Card Processing.

**RESULTS**

Business volume grew by 50 percent in just four years without hiring additional service personnel, and online volume increased from 10 to 38 percent.

*"Our business volume has grown by 50 percent in just four years, thanks to our Sage MAS 200 e-business solution—without adding a single person in customer service."*

—Joe Souza  
Vice President of Operations  
CFM Equipment Distributors

## ABOUT SAGE SOFTWARE

Sage Software has been responding to the needs, challenges, and dreams of small and mid-sized businesses for over 25 years. With a complete range of business management solutions and services, Sage Software helps companies improve customer relationships, reduce costs, and automate and integrate a variety of operational activities. Its solutions support the specialty needs of a broad scope of industry segments, including manufacturing, distribution, construction, real estate, nonprofit, and professional services.



"Many of our customers are small contractors who are out on job sites all day long," explains Souza. "It's hard for them to place orders during normal office hours. They really appreciate being able to place orders in the evening or on weekends. Because we are the only distributor to offer such extensive e-business capabilities in our region, this gives us an important competitive edge."

### Real-Time Inventory

Customers can go online and check out whether the HVAC equipment is in stock in CFM's warehouses, thanks to the Sage MAS 200 real-time inventory system. "We have two warehouses, and will soon have three," says Souza. "Our reseller provided a customization to e-Business Manager that allows the customer to see that if an item is not in the warehouse closest to them, then they can make a decision about ordering from our other location. This is very helpful to them."

### Peace of Mind

"Also, by purchasing an item online, our customers can feel secure about guaranteed availability," Souza continues. "No one else can come in and buy the product out from under them. They also know their exact costs. They really like this certainty, which competitors with only telephone or fax ordering often cannot offer."

CFM had expected the launch of e-commerce to be difficult. "To our surprise, e-Business Manager was a piece of cake," says Souza. "You just plug it in and it works. Our customers find it easy to use, too."

### Proud Pioneers

Souza adds that although many other HVAC equipment distributors have been talking about offering online service, none have a system that even comes close to CFM's. "We were definitely the pioneers in this area, and are reaping the benefits of early adoption," he says.

"The real-time features of e-commerce, plus the inventory control offered by Sage MAS 200, make us a very effective force in our industry here. Without a doubt, our e-Business Manager solution has fueled our expansion."

### Big Bottom-Line Benefits

How has CFM's e-commerce strategy worked? Better than anyone could have dreamed. "Our business volume has grown by 50 percent in just four years, thanks to our Sage MAS 200 e-business solution—without adding a single person in customer service," says Souza. "In addition, our e-commerce sales now bring in 38 percent of our revenue, compared with only 10 percent before implementation.

"Because of this, we expanded into a new facility last year, which is more than twice as big as our old location," he continues. "And the efficiencies of our Sage MAS 200 software contribute to keeping our prices more competitive. Sage MAS 200 and our business partner have allowed us to deliver to our customers all the information they could possibly want, as quickly as they can ask for it. You couldn't ask for a better endorsement than that."

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