



Bryan Equipment Sales, Inc.

Powering efficient document processes



Bryan Equipment Sales, Inc. (BES), a wholesale distributor of STIHL outdoor power equipment, has shipped over four million STIHL power tools since 1967. From its 125,000-square-foot warehouse and office facility near Cincinnati, Ohio, Bryan Equipment's 75 employees serve approximately 1,200 full-servicing retailers across a six-state region consisting of Indiana, Kentucky, Michigan, Ohio, middle and western Tennessee, and West Virginia. The company's sales force is located primarily in the field, enabling closer relationships with customers but adding complexity to communications between field staff and the home office.

Since 2000, BES has increased its revenues from \$60 million to \$100 million — with minimal increase in employee head count. As the work has grown, BES made changes to its IT infrastructure that allowed it to take on more customers without expanding the size of the team.

Mike Ulloa has been the IT Manager for BES since 2001, and has made Esker an integral part of the IT infrastructure.

Situation

Most Bryan Equipment Sales retailers are smaller retailers that follow just-in-time inventory practices, often placing orders for parts as they receive repair requests from their customers — sometimes daily. They prefer that BES includes a packing slip with the shipment, as well as an acknowledgement when the goods are shipped. These customers may not be technically advanced, so documents must be sent precisely the way they ask for them or they will not receive the information.

Challenge

As an Esker Fax user for several years, BES had been delivering invoices electronically to its customers via fax. BES regularly processes over 600 to 800 invoices nightly, with email or fax communications generated according to the customer's specific preference. The automated process resulted in customers receiving a notice prior to actually receiving the goods — a practice enthusiastically welcomed by customers. BES was also able to send order acknowledgements as soon as orders entered the system, whether it came in by fax, voicemail, email, business system, or web entry.

BES was very satisfied with the service Esker Fax provided its company over the years, and as the company continued to grow it realized there was a need for a more dynamic document delivery solution. It needed a mechanism to not only deliver documents electronically, but to also

intelligently extract information, route documents to appropriate individuals within the company, and archive them. The team was sending well over 1,000 documents per day, varying in size, format and destination, and simply needed a more powerful solution to handle the volume. This led the team to Esker DeliveryWare.

Solution: Esker DeliveryWare

Esker DeliveryWare is an end-to-end document process automation software solution that enables organizations to receive and send business-critical documents, such as invoices and sales orders, regardless of source or format, directly into and out of ERP systems and other enterprise applications. Its capabilities allow users to keep a document electronic throughout its entire lifecycle, eliminating the need for physical document handling. This results in saved time, reduced costs and improved accuracy.

"Although we were very familiar with Esker at the time, we did explore a few other options, but still came back to Esker because it is the only solution we found that could do everything we wanted in a single, convenient, well-developed platform," said Ulloa.

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Mike Ulloa ■ IT Manager ■ Bryan Equipment Sales, Inc.



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BES viewed the transition from Esker Fax to Esker DeliveryWare as a change from using a fax server to a communications server.

“With Esker DeliveryWare, we can still use our main business system, Prophet 21, to manage all of our customer information,” said Ulloa. “We simply email invoices from Prophet 21 directly to Esker DeliveryWare and it will read the information that determines a document’s destination and then automatically send it for delivery in the format requested by the customer. The solution does the same for order acknowledgements, which comes in an XML stream and is formatted by Esker Deliveryware into the appropriate format.”

The majority of BES customers prefer to receive their business correspondence via fax. For example, on a typical day BES emailed 360 invoices through Esker DeliveryWare while faxing 877 invoices to customers.

In addition to using Esker DeliveryWare for sending invoices, BES also relies on the platform for inbound document delivery. Incoming faxes are converted to TIF files and sent directly to the inbox of the appropriate employee.

Other departments within BES are using Esker DeliveryWare to simplify the transmission of documents. For example, sales representatives in the field are able to create mail merges for mass communication purposes directly from their desktops for delivery to their specific customer bases. There is no need for IT to assist in the process. The BES marketing department is also using Esker DeliveryWare for easy broadcast transmission of special sales to its dealers and newsletters to its customers.

“Esker DeliveryWare has had a great impact on our business. Before we had no means for document capture, routing or archiving, and now it’s all done automatically,” said Ulloa. “The technology is manageable, creating little to no extra work or hassle for my team. It’s also incredibly flexible — finding a way to automate anything from A to Z. And perhaps most important, Esker DeliveryWare is cost effective. With the solution in place we are able to meet our financial targets without increasing the head count as well as absorb all the savings that come with eliminating excess printing, faxing and mailing processes.”

BES has been very happy with the level of support Esker provides its team, and BES customers report a higher level of satisfaction because they can choose among delivery options and can even opt out of receiving certain documents.

“We’ve worked with Esker for a long time now and greatly appreciate how they’ve continued to help us implement more efficient business workflow processes along the way. First, it was moving from manual paper-intensive fax techniques to automated fax, and now we are broadening our automation capabilities beyond fax to include more intelligent document delivery methods,” said Ulloa. “Esker DeliveryWare fulfills lots of needs and it has been a wonderful relationship this far, and we are looking forward to achieving more success together in the future.”

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