



Advanced Supply Chain Software™

for Microsoft Dynamics® AX



CLIENT SUCCESS STORY: James M. Pleasants Company

Immediate access to product status, and historical order and quote information made Advanced Supply Chain Software™ a hero with James M. Pleasants Company.

James M. Pleasants Company (JMP) was founded in 1958 as a stocking sales representative for Bell & Gossett products by Mr. James Pleasants. They have 15 offices in 6 states covering the Southeast United States. The company has grown as an employee-owned sales organization over the years, emphasizing the application of

hydronic systems while providing superior customer service.

Their mission is to provide customers with energy-efficient water and steam related products, along with solutions to their hydronic needs. They will accomplish this while striving to be the best manufacturer's representative in the country to their customers, vendors and employees.

With more than fifty years' experience and the representation of more than twenty lines, James M. Pleasants Company has the expertise and products to provide integrated hydronic, steam and condensate systems.



Overview

Customer Profile

With more than fifty years' experience and the representation of more than twenty lines, James M. Pleasants Company has the expertise and products to provide integrated hydronic, steam and condensate systems.

Business Issue

System speed and Customer Service response time based on access to information was slowing the JMP team down. Additionally, visibility into key information like past quotes and product status was lacking.

Solution

Software:

Advanced Supply Chain Software™

Microsoft Partner:

I.B.I.S., Inc., a Sonata Software Company

Benefits

- Visibility
- Speed of System
- Access to Key Information
- Improved Customer Service



“When I think about working with I.B.I.S., I think about two things:

- 1. Manufacturing & Distribution Expertise*
- 2. Customer Service Focused”*

Chuck Moore, VP, Operations at James M. Pleasants Company

Situation

JMP, predominantly a distribution sales company, uses Microsoft Dynamics® AX 2012. They had recently moved to AX 2012 from 4.0. One of the main challenges they faced with the upgrade to AX 2012 was a much slower system speed. Additionally, they had a few other business challenges:

- **Product Status.** They needed a visual way to see which of their products were on back order, what was in stock.
- **Duplicate Order checking.** There was about a 30 second delay in getting that information to their customer service staff when needed.
- **Credit management.** They lacked the visibility into customer payment status. Which customers were late on their payments? If a customer is in good standing, there is no credit limit. However, if they are not paying, JMPCO needs to know that and stop future orders from going out.
- **Historical Quote Information.** This functionality was missing as they had no central repository for previous quotes.

Solution

JMP needed to save time in Customer Service. After looking at Advanced Supply Chain Software™ (ASCS) powered by I.B.I.S., Inc., it was clear it could help the Customer Service department serve their clients better by giving them faster response time to needed information. JMP was very pleased with the ASCS Dynamics AX integration and coding.

Partnership

In the initial conversations with I.B.I.S., Inc., JMP had a “good feeling” about the expertise that I.B.I.S. brought to their Advanced Supply Chain Software™. They liked the expertise the I.B.I.S. team has in the distribution and manufacturing industry. I.B.I.S. had a good grasp on business management and how to help JMP.

Benefits

JMP knew they needed to save time in Customer Service, when they looked at ASCS, they intuitively knew it could help the JMP Customer Service department serve their clients better by giving them faster response time to needed information. Additionally, Advanced Supply Chain Software™ addressed all the following challenges:

- **Visibility.** JMP needed a visual way to see which of their products were on back order, what was in stock. The color coding feature in ASCS provides JMP a quick visual into both areas. Additionally, ASCS brought in a lot of visibility into customer payment status, improving their credit management.
- **Speed.** There was about a 30 second delay in getting that information to their customer service staff when needed. ASCS is providing them immediate access into that area so they do not have issues with duplicate orders they were seeing before.
- **Access to Key Information.** This functionality was missing as they had no central repository for previous quotes; with ASCS, JMP employees can quickly see past quote information.

FOR MORE INFORMATION

For more information on James M. Pleasants Company, visit www.jmpco.com.

For more information on I.B.I.S., a Sonata Software Company products, services and Microsoft offerings call **770.368.4000** or visit www.ibisinc.com on the web.

