



# Happen Business Case Study

## Proserpine & District Industrial



<b>BUSINESS CLIMATE:</b>	GROWTH AND DEVELOPMENT
<b>CHANGE CATALYST:</b>	NEED FOR BETTER CONTROL OVER KEY AREAS
<b>SOLUTION:</b>	JIM2 BUSINESS ENGINE
<b>JIM2® EDITION:</b>	PREMIUM EDITION + TAILORED OPTIONS

**Proserpine & District Industrial is an Australian owned family business, and the Whitsunday Region's one-stop retailer that specialises in fasteners, bearings and seals, welding equipment, power tools, hydraulics, air tools, hand tools, abrasives, cutting tools, engineering supplies, safety equipment, and general hardware. The team has serviced the area for almost 20 years, supplying local industries including farming, earthmoving, cane, quarries, local council, and handymen with the equipment they require to get machines running, or their jobs done. They are members of the Tradesmart Industrial Group, one of Australia's Leading Industrial Supply Groups.**

P & D Industrial was running a thriving business composed of all that comes with a retail setting – plenty of inventory, many repeat customers, and a team of knowledgeable staff that needed a solution to exceed customers' expectations, and keep the business profitable.

Running operations on excel spreadsheets, accounting, and payroll packages meant information certainly didn't flow easily throughout the business. It was causing frustrations, and becoming a growing administration burden to keep operations running smoothly.

### Systems That Didn't Talk

While the team skilfully matched solutions to their varied customers needs, behind the scenes was a headache, to say the least. Sales tracking was totally paper based, inventory was managed without stock control, there was no mechanism to enforce uniform pricing, and it was virtually impossible to recall customer sales history. Up-to-date information didn't come easily, but the team's knowledge was on point. Training became a growing concern. As you can imagine, when everyday processes are a hurdle for experienced staff, how would new rookies take to learning their ways?

When it came to invoicing, Brooke Mansfield, Partner at P & D Industrial found it slowed her down and created roadblocks. It took two days per month to manually add invoice sheets, process transactions in their accounting system, and finally mail outstanding balances to their customers. It was only then that Brooke would routinely uncover a number of pricing errors, and instances of selling under cost. End of month billing was not a joyous occasion.

After looking at a list of solutions on the market (in fact, too many to count), the team learned of Jim2 Business Engine at a group conference, and spoke with one of their suppliers who had first-hand experience using Jim2 to run their operations.

"Jim2's Stock Kitting is a great way for us to remember multiple part numbers for seal kits, for example. Listing each component in a ready made kit, plus having the control to show/hide original part numbers on invoices has been a great feature that we find really handy."

**BROOKE MANSFIELD**  
PARTNER  
P & D INDUSTRIAL



Designed, Developed & Supported in Australia,  
Jim2® Business Engine is a complete business solution to manage every aspect of your workflow cycle and solves the growing pains of small to midsize enterprises.

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"Transaction history at our fingertips has made a huge difference to our offering. Our customers know that we can look up exactly what parts they purchased ten years ago, or only yesterday. They also know that by adding a reference when they make a purchase, we can easily look up exactly what they bought. It really helps us to provide a faster and much more informed customer experience."

**BROOKE MANSFIELD**  
PARTNER  
P & D INDUSTRIAL



### Key Benefits

- Uniform stock control
- Streamlined purchasing experience
- Greater visibility over all operations
- Enhanced internal communications
- Real-time business intelligence
- Increased confidence over pricing

## Prompt, Professional, Informative

With keen interest, Brooke contacted Happen Business to further investigate Jim2's opportunities. She found the team to be very professional, informative, and prompt to answer their many questions, and found the price of the software and implementation to be very reasonable.

As you might expect, the prospect of real-time stock control, running their accounting and retail needs in one package, easily producing batch invoicing, receiving regular electronic vendor stock feeds into Jim2 with electronic purchasing, and the total setup cost ticked many items from their checklist to achieve greater control and efficiency. Plus, Brooke found a real win in her own requirements of a prospective provider. "The team at Happen were patient and informative with the number of phone calls and emails along the way," says Brooke.

Opting for Happen to drive the deployment, P & D Industrial moved to Jim2 in late 2011 at their premises. "Training was great and we did teach old dogs some new tricks," recounts Brooke. Plus, they found the support following the implementation and training period to be very handy.

## Live Reporting and Analytics

With Jim2 in place, and experience under their belt, they now find far greater control and clarity in their operations. Live stock control has tamed their inventory mess, making it more uniform, and helping the team to easily identify their best-performing products, and those in lesser demand. With every detail captured in Jim2, they now benefit from immediate access to business reporting, and the ability to analyse key figures in real time, at a click.

Inconsistent pricing is a stress of the past as the team find great benefits from having hierarchical discount structures set in Jim2. Whether it's pricing for individuals or customer groups, it's much easier to manage, maintain and control.

Over time, P & D Industrial came to really grasp the advantage of having their vendor stock feeds flowing into Jim2, filtered and tracked with their own stock as well. It's helped them to be far more calculated with details on availability and pricing, to better assist their customers.

## Complete Visibility

Now everything is in one place. By having email correspondence also in Jim2, with other notes, tests and checks on individual jobs, staff always have the full picture readily available. And being able to easily price stock using the price templates in GL Groups or Stock Groups definitely makes it effortless for Brooke to adjust pricing well into the future.

For the team at P & D Industrial, Jim2 has enabled them to get a better grasp of what's going on now, what they need moving forward and what they have sold in the past, without dedicating hours to paperwork and headaches. And new staff love it too.

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