



Client Success

RILEY SALES, INC.

WHOLESALE DISTRIBUTION

REINVENTING THE HVAC PROFESSIONAL EXPERIENCE WITH NET AT WORK



CHALLENGE

As a LINUX-based application, the company's existing ERP software was not delivering modern features to properly support the growth of Riley Sales.

SOLUTION

Riley Sales turned to trusted business partner, Net at Work, to help select, implement and optimize its Next-Generation ERP application as part of its Digital Operations Platform (DOP).

RESULTS

Acumatica supports and optimizes every aspect of the company's operations across nine locations.

- Reduced monthly close from 22 days to 5 days
- AP automation eliminated the need for an additional FTE position
- eCommerce removes quoting responsibilities from sales and grants AR access to statements
- Pricing engine gives visibility into margins and flexibility to adjust pricing by a variety of factors

Riley Sales puts pretense aside and pours its energy into being the most trusted resource for HVAC professionals throughout the greater Philadelphia area. In addition to its extensive inventory, Riley Sales offers custom fabrication services, financing options, and a regular lineup of professional training courses. The company's reputation for superior service and technical expertise has fueled its growth and expansion into a nine-location, 75-employee, \$45 million dollar success.

LEGACY ERP CLOGS PROGRESS

Brandi Coats joined Riley Sales in 2018 as its CFO. On her first day on the job, she learned that the company's aging, on-premise ERP, Infor FACTS, was no longer serving the needs of the HVAC supplier. "My first task was finding a replacement that could support the company's unique operations while providing the solid financial backbone every growing organization needs," says Brandi. "We saw it as an opportunity to accelerate the company's digital transformation, allowing us to take advantage of new technologies and the efficiencies they bring."

The company had a long-standing relationship with technology advisor Net at Work, and Brandi looped in the firm's consulting team to discuss the next steps. "They already understood our business model, which was tremendously helpful," Brandi says. "Together, we looked at applications that could move us forward, and one of the applications Net at Work recommended was Acumatica. They gave us a demonstration, and we immediately knew Acumatica was our next-generation choice."

THE DIGITAL TRANSFORMATION BEGINS

Today, nearly every one of Riley Sales' employees uses Acumatica across departments and locations. "Acumatica has become our base of operations," notes Brandi. "We rely on it to serve our customers and keep the company moving forward."



“We help our customers scale their businesses with competitive pricing, expert service, and support. Net at Work has a similar commitment to supporting growing companies — meeting them where they’re at and helping them grow to where they want to be.”

Net at Work and Acumatica are core enablers in Riley Sales’ digital transformation. The company has doubled its ERP license level since they started, and are now processing about 10,000 commercial transactions a month. “We’ve moved all our technology to the cloud,” Brandi explains. “The old servers are gone, and we’ve shifted to Microsoft Azure and Office 365. As a result, we can operate much leaner and more efficiently now, even down to emailing customer invoices. Just a short time ago, we paid a service to print and mail them.”

GUIDED IMPLEMENTATION AND ADAPTABLE SOLUTIONS

From the finance and accounting side of the business, Brandi describes the ERP implementation as seamless. “We now have widespread data transparency, as data access is live through a refresh button in Excel via an ODP link. We’ve removed all paper except for pick tickets. We’ve automated 100% of our accounting functions, including invoice processing, statement generation, service charge assessments, and more. I have more time for strategic planning and analysis now because I’m not spending time on redundant, manual tasks.” For example, Brandi says it used to take her 22 days to close the books — a process that takes just five days with Acumatica.

The company has a unique pricing structure. So unique, in fact, that salespeople performed many pricing calculations manually, feeding the final price into the old ERP software. To accommodate the structure, Net at Work designed and built customizations into Acumatica, integrating special order costs with EDI. “Our sales teams were initially skeptical about the system change,” recalls Brandi. “Net at Work helped lead a successful change management initiative, making sure they listened to the salespeople’s concerns, fully understood the changes that needed to happen, and then built out the customizations, tested them, and perfected them.”

SCALABLE AND EXTENSIBLE APPLICATIONS

Immediately following the implementation, Riley Sales put Acumatica to the test. “We grew exponentially throughout the pandemic,” Brandi explains. “Our experienced team has built out a sophisticated, highly accurate procurement program, and they were prepared for the onslaught of supply chain challenges. With their expert knowledge, and Acumatica’s automated workflows and flexible structure, we kept inventory flowing to our customers and had a record year.”

Net at Work introduced Riley Sales to TRAILD, an accounts payable automation application that integrates with Acumatica, and very quickly the solution more than paid for itself.



“We were able to go live on TRAILD in just two days,” Brandi says. “Suppliers send invoices to a designated email address and TRAILD handles it from there. For the best accuracy, it performs a three-way match against the purchase order receipt quantity, cost, and item number. TRAILD attaches a copy of the invoice to the transaction so there’s no more rifling through boxes for invoices. In addition, our approvers work right inside the application making the whole workflow faster, simpler, and more accurate. As a result of the efficiencies gained, we’re saving the equivalent of one full-time employee, and redirecting personnel toward more value-generating activities.”

All nine of Riley Sales’ locations are open to over-the-counter sales, and Acumatica is the application that fuels those transactions. “Acumatica Distribution Edition with Counter Sales works well in this environment,” notes Brandi. “Most customers have an account we bill monthly, but we’re currently working with Net at Work to implement a point of sale processing solution to more effectively handle walk-in sales.”

TURNING UP THE HEAT ON TOMORROW

While continuing to honor its 50 years of history and tradition, Riley Sales has its sights set on the future. The next stop on its digital transformation journey is advancing the integration of its eCommerce platform with Acumatica. “Thanks to Net at Work’s help, our B2B portal is already up and running,” says Brandi. “Plus, we are preparing to launch a B2C site in 2024, and also join another online distributor marketplace. Not only does eCommerce free up our salespeople’s time, but it also gives Riley Sales a larger market presence. We can penetrate markets that were out of reach before.”

With its Next-Generation ERP solution and skilled technology partner, Riley Sales is prepared to take on tomorrow’s growth opportunities. “Our sweet spot is smaller HVAC contractors that may have only one or two trucks and a couple of employees,” Brandi explains. “We help our customers scale their businesses with competitive pricing, expert service, and support. Net at Work has a similar commitment to supporting growing companies — meeting them where they’re at and helping them grow to where they want to be.”

She concludes, “Net at Work is an ideal partner for us. Their deep knowledge and ability to bring in additional business resources as necessary made this project a success. I see a real commitment to customer service and a true understanding of how to leverage technology to help businesses grow. Because we don’t have an in-house IT and run lean operations, having a Customer Experience Plan with Net at Work ensures we’re conducting updates, tracking progress points and interfacing with our Managed Service Provider and other key contacts to help prioritize and push initiatives forward. Net at Work’s knowledge base and expertise is what made our digital transformation possible.”

ABOUT NET AT WORK

Founded in 1996, Net at Work is a leading technology advisor to thousands of small-to-medium sized businesses throughout North America. The consultancy offers a rich portfolio of technology, expertise, and services to help organizations derive value from the transformative effects of technology.

To start unleashing the power of your business, visit www.NetatWork.com.