

# SCHAEFER SASH & DOOR IMPROVES MILLWORK AND MORE WITH ACTIVANT FALCON



## Executive Summary

Using Activant Falcon® since 2006, Schaefer Sash & Door's millwork, special order, and quotes and bids processes have improved. Inventory is more accurate, which saves time and improves buying decisions. Performance Driver Suite provides key decision makers with quick, accurate snapshots of business performance.

## PROFILE

**Headquarters:** Cordova, Tennessee

**Annual Sales:** \$20 Million

**Sales Breakdown:** 95% contractors/builders, 5% retail

**Number of Employees:** 110

**Locations:** 1

**Founded:** 1982

**Affiliation:** None

**"The Activant account manager told us how the Millwork module would work and it's done exactly that. All of our expectations were met."**

PAUL SCHAEFER  
CO-OWNER

## Growing Company Needs Robust Millwork Solution

After starting as a door and window company 25 years ago, Schaefer Sash & Door expanded rapidly by adding a hardware division carrying a full line of hardware and lighting, and by starting a lumber company. Having outgrown the capabilities of its Woodware system, Schaefer implemented Falcon in June 2006.

"The Falcon Millwork module was one of the big reasons we implemented Falcon. We needed more accurate tracking of our millwork inventory. Our previous solution didn't automatically transfer materials inventory as windows and doors were built. We had to enter the transfer transaction manually, and more often than not, we circumvented the system. We were forced to physically count to know what inventory we had," explains Paul Schaefer, co-owner. "The Activant account manager told us how the Millwork module would work and it's done exactly that. All of our expectations were met."

Falcon automatically transfers inventory as millwork orders are built and delivered. In addition to improving raw materials, work in process and finished goods inventory tracking with Falcon, Schaefer's millwork process is now more efficient. "The flow of millwork tickets has improved. Order information is properly entered and the workflow runs better. Millwork specialists print their tickets and know exactly what they need to build that day. They pull their materials and start working," describes Paul.

## Streamlined Quotes, Orders and Special Orders

The Schaefer sales team appreciates their new ability to convert quotes to orders with a click. "With Falcon we enter orders more efficiently and shifted one person to do inside sales part-time and spend the rest of her time coordinating between sales and the shop to make sure that orders flow smoothly," says Paul. "We didn't have someone to do that before. It's a much better use of a resource than re-typing orders."

The special order process also runs more smoothly, giving Schaefer a competitive edge in the slow housing market. "We enter a special order and can then track it to know when it comes in. In the past, an order could come in and we may, or may not know about it for a couple of days. Now we get that information instantly," continues Paul. "With the housing decline, the builder market is more competitive. Our ability to use information to deliver better customer service is more important than ever before."

#### **Accurate Inventory Leads to Better Buying Decisions**

Schaefer's inventory is more accurate, which results in lower adjustments at year-end and provides the purchasing team numbers they can trust. "I think the biggest benefit since we switched to Falcon is that the inventory is a lot more accurate. We have the confidence that when Falcon says we have 12 of something, we believe the system and don't double-check by going out and manually counting," explains Paul. "We save time and make better buying decisions."

#### **Performance Driver Suite Dashboards Improve Business Management**

A few months after going live on Falcon, Schaefer added Activant Performance Driver Suite to provide its management team with the ability to monitor the business with easy-to-use dashboards. "Performance Driver Suite gives us a quick snapshot of all the important business information we need. We can see our divisions separately or all together. When we had questions before, we had to go to paper reports and/or build a spreadsheet to find the answer. Now it's all right in front of us," says Paul. "It's very powerful to have instant access to key information in a format that's easy to understand. My father who is not a 'computer guy' uses Performance Drive Suite throughout the day to track sales, inventory, receivables and cash flow. It's a wonderful tool!"

"We knew our Millwork operation would run better on Falcon. The added bonus is that everything runs better on Falcon. And we easily monitor our entire, complex operation with our Performance Driver Suite dashboard. With the business slowdown, we have a competitive advantage with Falcon," concludes Paul.



With the Millwork module, the special order process runs more smoothly, giving Schaefer a competitive edge in the slow housing market.

#### **ABOUT ACTIVANT**

Activant, a leading technology provider of business management solutions serving small and medium-sized businesses, offers customers tailored proprietary software, professional services, content, supply chain connectivity, and analytics. Activant's systems are designed to help customers increase sales, boost productivity, operate more cost-efficiently, improve inventory turns and enhance trading partner relationships.

**To learn more about this or other  
Activant products and services,  
please call 888.463.4700.**



Activant Solutions Inc. • 7683 Southfront Road • Livermore, CA 94551  
Phone: 888.448.2636 • E-mail: [industry.marketing@activant.com](mailto:industry.marketing@activant.com) • [www.activant.com](http://www.activant.com)

© 2008 Activant Solutions Inc. All rights reserved. Activant, Activant Falcon and the Activant Logo are trademarks or registered trademarks of Activant Solutions Inc. All other company or product names are trademarks or registered trademarks of their respective companies.

07FSSSCHAEF