

Tropic Supply and Phocas: Right information. Right people. Right time.



HVAC/R company gets unprecedented insights into sales and counter promotions with Phocas

Tropic Supply Inc. (Tropic) has been serving the HVAC/R industry in Florida for the past 45 years, opening its doors in 1973 out of a warehouse in Miami. Since that time, the company has added 21 new branches, covering both coastlines from Miami to Jacksonville and Tallahassee to Naples. The independent family-owned business with more than 250 employees provides 24/7 access to HVAC support and services.

As Tropic has grown, so has its need for reporting. In January 2012, the company upgraded its ERP to Infor SX.e and started to deploy the system's "generic" reporting, which users found cumbersome.

Tropic tried to enhance the ERP's capabilities with a variety of tools, including a software product that downloaded reports directly to Excel spreadsheets.

Unfortunately, the combination of systems and tools was still limiting. In 2014, the company went through the process of evaluating other data analytics solutions, ultimately deploying Phocas.

Client [Tropic Supply](#)

Sector Wholesale distribution

HQ Location Sunrise, FL

ERP Infor SX.e, version 11



“We really liked Phocas because it was **easy to use and allowed us to deploy BI to non-technical people** who were able to take care of their own reporting needs.”

Michael Clay, director of IT and operations at Tropic Supply.

One solution does it all

Clay and his team are using Phocas for a variety of reasons and have recognized a number of benefits.

One of the main benefits of Phocas is getting the right sales information into the hands of the people that need it on a daily basis. Today, 17 Tropic sales reps have their own log-ins and are using Phocas to manage 50 accounts within their own territories.

They now have access to everything that their customers have purchased and can see their sales from the beginning of their time with the company.

“Data is pulled from SX.e, and **as long as the data is accurate on the accounts receivables side, it works flawlessly**,” said Clay. “Sales reports are critical, and our sales people now run their own commission reports directly from Phocas. In addition, purchasing, executives and owners, and recently added branch managers can use Phocas for their specific needs and functions. **One solution does it all.**”

Phocas helps Tropic evaluate whether customers are hitting set pricing levels based on anticipated sales. Some customers promised to spend more, so Tropic moved them to better equipment pricing levels.

After a period of time, Tropic used Phocas to track their purchasing habits by product category once they were given better pricing. Tropic found that a few dealers were taking advantage of the better pricing levels for one-off, short-term projects, instead of their intended function as a long-term business partnership.

Tropic now uses Phocas to pull in customer information by product categories and by warehouse to determine the most appropriate pricing.

CHALLENGES

Needed executive-level dashboards

Difficult to manipulate and view data

Too much time spent on custom reports

Former solution challenging for non-technical users

“The flip side to this is that we noticed a few customers at lower pricing levels who were spending more than \$125,000 with us. So, we went to them, thanked them for their business and support, and were able to give them better pricing,” said Clay. “**Phocas allowed us to proactively work with customers to put them at the appropriate pricing levels, and our customers couldn’t be happier.**”

Phocas helped Tropic overcome a number of challenges with its previous solution, including:

- **Ability to manipulate and view data how Tropic’s users want.** Something as simple as combining sales totals by customers or product categories for Tropic’s two North Miami locations, which was a challenge previously, is now possible with only a few clicks in Phocas.

- **Building customized reports.** Every sales report downloaded to spreadsheets from the previous software contained high-level, sensitive company sales information, regardless if the report was run for a specific customer, location or product category. Each time a report was run, administrators would have to manually remove net sales and net warehouse sales. With Phocas, users can easily control every piece of data so every report can be customized.
- **Performing custom work.** Many of Tropic's ad hoc report requests required custom work, which meant additional fees incurred by the software provider. In Phocas, every click is a report, allowing Tropic to do much of its own custom work.
- **Simple and fast ad hoc reporting.** An ad hoc report that took 10 minutes in its previous solutions takes Tropic only 90 seconds to create in Phocas.
- **Easy to use for non-technical team members.** The prior software was not designed for non-technical users. As the Tropic team went through Phocas training, many team members embraced the solution because of how easy it is to use.

SOLUTIONS

Switched from former solution to Phocas

Learned about Phocas' latest product offerings

Phocas also helped Tropic with counter promotions

At a meeting about a new counter promotion, the owner asked all the managers if they knew how many customers spent less than \$10,000 with Tropic.

The owner was certainly not expecting an answer right then, but with a couple clicks in Phocas, Clay responded, "427."

Tropic then incentivized the counter team with a performance bonus based on the number of these customers they could get to spend more with the company.

OUTCOMES

Sales team had increased access to data and reporting

Ability to track customers' purchasing habits by product category

Adjust customers' pricing based on purchase history

“**We turned around a few customers and were able to flip some to better pricing levels,**” said Clay. “Perhaps more importantly, we have team members specifically assigned to work with these customers, which lets them know that we care about their business and is having an impact on retention.”