



Sustained Growth Triggers Successful Collaboration Between CBUSA and The Resource Group



Customer: CBUSA
www.cbusa.com
Portland, OR

Industry:
Distribution

Solution Selected:

- Microsoft Dynamics GP
- Management Reporter
- Nolan Advanced Bank Reconciliation
- Concur Expense Management
- Builder Rebate Enhancement created by The Resource Group

Key Benefits:

- Enhanced processing of cash receipts and correct application to various accounts.
- Automated update of customer contact records and integration with transaction data.
- Process improvement
- Online statements for customers
- Real-time access to customer account data enabling action on past-due accounts.

Microsoft Partner:
The Resource Group

Business Situation:

Catering to the needs of builders as well as suppliers and manufacturers across the nation in the building trades, CBUSA founded a premier home building network in 2004 to help local and regional builders achieve pricing and service equivalent to that of large-scale competitors.

As a CBUSA member, hundreds of premier builders have the combined purchasing volume and buying power of a national builder. This market strength allows members to gain a significant purchasing advantage over their competitors and to deliver increased purchase volume to the hundreds of vendors and manufacturers in the CBUSA network.

But it's no small task to effectively fulfill the needs of a widely dispersed and diverse audience. Driving that need to better serve customers was the overall growth of the business since first implementing Microsoft Dynamics GP in 2008. Brendan Sheehan, CFO of CBUSA, says "Over time our business model had evolved and we needed more automation to allow CBUSA to grow without excessive amounts of time spent on manual processes."

A customization to Microsoft Dynamics GP created by a different partner helped solve some of the data integration needs at the time but eventually problems arose. CBUSA's growth put pressure on the efficiency of the customization, plus the nature of app had data passing back and forth "outside" of Microsoft Dynamics GP.

CBUSA was looking for a solution that would allow them to seamlessly integrate their data with Microsoft Dynamics GP, efficiently automate processes such as rebates and cash receipts, and better service more than a thousand builders, vendors, and manufacturers across the US.

"At the launch, we were impressed with how much The Resource Group had done to enable a smooth and seamless transition to the new platform."

**Brendan Sheehan | CFO
CBUSA**

Learn how The Resource Group can help you with Microsoft Dynamic GP.

 **844.287.4760**  www.resgroup.com  info@resgroup.com

Solution:

The Resource Group completed an operational review of CBUSA's current use of Microsoft Dynamics GP, listened closely to their business needs, and designed a radically innovative solution to accomplish their goals by developing the Builder Rebate Enhancement. The new application is now built 100% within Microsoft Dynamics GP, not only streamlining many manual processes but most importantly, ensuring the integrity of the data. Prior to this enhancement, CBUSA was constantly on the alert for corrupt data and was often manually reconciling information. Growth was taking place but not within the financial processes where the ability to scale up to embrace new business was impaired.

Benefits and Outcomes:

Overall, the Builder Rebate Enhancement developed by The Resource Group brought widespread process improvement to CBUSA. Specifically, CBUSA now has...

- Greater confidence when processing cash receipts and credit cards and applying them to the various accounts.
- Improved processing of rebates earned by members. Formerly this was a time-intensive process that was not only simplified via workflows but is now accurate.
- Implemented a new level of integration between CBUSA's line of business applications and Microsoft Dynamics GP, allowing for more automation, better reporting, and a better customer experience.
- Eliminated a third-party platform for invoice delivery with the help of The Resource Group. In addition to a cost savings, CBUSA can now easily email professional looking invoices to customers via the forms printer, giving them more information and resulting in higher customer satisfaction.
- Real-time access to customer data allowing CBUSA employees to closely monitor and if necessary, take action on past-due accounts which improves cash flow in the long run.
- The ability to give members access to their account and transaction information in real-time.

"One of the best things about working with The Resource Group is that they were great partners. They have a great team, really experienced people who are experts in what they do, and gave a lot of thought to the high level architecture as well as the details. That care and expertise really showed in the final product launch."

**Brendan Sheehan | CFO
CBUSA**

4 Key Elements of Success

Another "win" was the close partnership that resulted between CBUSA and The Resource Group over the course of the development and implementation. Marty Schillaci, CEO, The Resource Group, says "The success of the project was based upon four key elements:

- A solid, engineered architecture and design;
- A platform built using standard Microsoft Dynamics GP tools so everything integrates well;
- A very knowledgeable developer, both with the tool set and with Microsoft Dynamics GP; and
- An amazing client to work with, Brendan is very sharp, made lots of great recommendations, and was a good communicator throughout the entire project."

Why The Resource Group:

CBUSA looked for a local Microsoft Dynamics GP partner that was thoroughly immersed in the product, had an extensive knowledge base, and offered ongoing education and training. They found all that with The Resource Group as well as quality people on staff, a deep technical expertise, and a depth of passion and commitment to making each of their customers successful.

Learn how The Resource Group can help you with Microsoft Dynamics GP.



844.287.4760



www.resgroup.com



info@resgroup.com