

# Mar-Hy Distributors Boosts Epicor P21 ROI With White Cup BI

Mar-Hy Distributors offers a one-stop shop for commercial HVAC equipment and supplies to help contractors reduce the cost of carrying inventory and provide technical support. While the company's ERP system, Epicor P21, was ideal for managing inventory and finance, it didn't make it easy for them to see customer, product and sales trends at a glance. Learn more about how Mar-Hy enhanced its business intelligence and reporting with White Cup BI, helping them identify growth opportunities.



**HVAC  
DISTRIBUTOR**



**BETTER BUSINESS  
INTELLIGENCE**



**STRONGER CUSTOMER  
RELATIONSHIPS**



**GREATER  
EFFICIENCY**

## The Challenge: Finding the Right Business Intelligence Software To Integrate with Epicor P21

As the Mar-Hy team prepared to transition from their previous ERP to Epicor P21, they knew they would need a new reporting solution. While they could export data from Epicor P21, its reporting capabilities are not intuitive. The team couldn't easily filter ERP data into reports to meet specific needs — such as reporting certain KPIs to its manufacturers or elite contractors.

They could find recent transactions for products, but not global sales for those items.

Without easily accessible product and sales data, it would have been difficult to report on overall business performance or identify areas for improvement. VP of Operations Eric Schmidt knew his team didn't have the time to create custom reports each time they needed to answer a question — or the desire to learn all the nuances of reporting in Epicor P21.

**“It’s always nice to be able to build a report once.  
We’re HVAC distributors; we’re not IT people.”**



**Eric Schmidt**  
VP of Operations  
Mar-Hy Distributors

## White Cup BI Improves Reporting on Key Performance Indicators

When Schmidt saw the intuitive nature of White Cup BI, he knew it would be ideal for his team. White Cup’s pre-built reports and dashboards that would automatically update was especially appealing.

Executive dashboards give him and his team a clear picture of overall business performance, including total sales, top customers and top products, so they can identify areas for growth and improvement.

“It’s been easier to immediately notice a trend a month or two ahead of time because White Cup is looking at many more data points and displaying it in a way that shows trends,” he said. “There is nothing in P21 that gives you that really quick snapshot outside of the monthly sales report.”



Monthly reports that only show total sales can be misleading, he said, because they don't account for price increases. Year-over-year sales might be up, but a decline in the number of units a customer has purchased for a certain product indicates a change that the Mar-Hy team may not notice until months later, when they have excess inventory.

While implementing a new ERP, BI software and document imaging solution at the same time was a lot of change to manage at once, Schmidt said White Cup BI was the easiest part of it. Because of the White Cup team's experience mapping data to ERP systems, they could integrate the systems seamlessly.

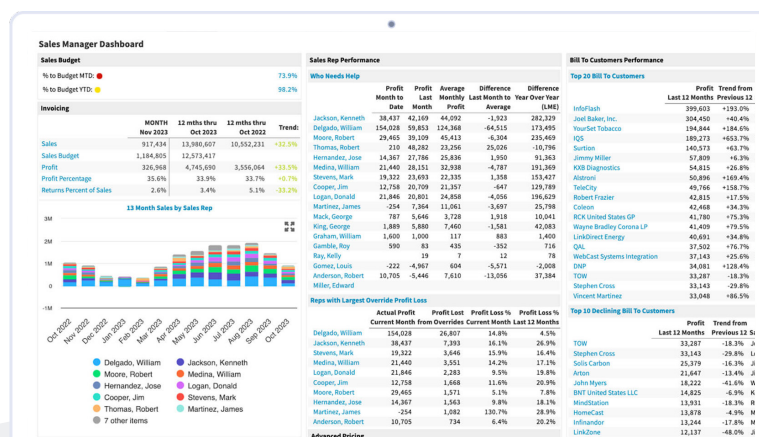
"I felt I had really good support," he said, adding that White Cup has continued to be responsive anytime his team has questions. "The White Cup team is awesome."

## Improving Sales Performance and Marketing ROI

Without White Cup BI, his company would have limited visibility into overall product and sales performance.

"Things like turns and fill rate, those things have immediate value, especially going through the pandemic when the goal was to get the fill rate back up. Sales by product group is super important; showing it year over year, month by month. And the top 20 bill-to customers and top 20 declining; I cannot tell you how I would figure that out in P21."

Being able to see these top 20 customers responsible for most of their revenue helps sales reps stay focused on the right priorities.



If they notice a decline in sales for a particular customer or product, they can follow up to find out why.

Schmidt also regularly receives sales commissions reports and reports on products sold from various sources, including local utilities that partner with them on marketing promotions.

The reporting in White Cup BI makes it easy to see the return on investment in those efforts. It's also much easier to teach his team to use the software.

**“You’ll be hard-pressed to find a reporting software, let alone a trends software, that has such ease of use. It’s a user-friendly way for anybody to access the data they want.”**



**Eric Schmidt**  
VP of Operations  
Mar-Hy Distributors

#### KEY RESULTS

- Implemented **better business intelligence** with White Cup
- Significantly **improved reporting** on key performance indicators
- **Team saves significant time** with pre-built reporting templates and dashboards
- **More proactive customer outreach** with easily accessible sales data

**Start Making  
Data-Driven  
Decisions**

Unlock the information buried in your business systems with powerful reporting and analytics from White Cup BI.