

# case study

**Client:**

Westcoast Tool Sales & Service Ltd.  
Vancouver, BC

**Owner:**

Eugene Hibbert

**General Manager:**

Robert Hibbert

**Product Solution:**

Windward System  
Five - OPE Edition

[westcoast-tool.com](http://westcoast-tool.com)

Westcoast Tools Sales & Service Ltd. | Windward Software Client Since: 2004



**Westcoast Tool Sales & Service Ltd., is a family owned business that has been serving customers for over 30 years.**

## Company Background

Located in Vancouver, BC - Canada, the company is a major distributor for Ingersoll-Rand, Bosch, Texas Pneumatic, Ajax, and many others tool manufacturers. The company operates as one of the largest repair and parts facilities in Western Canada.

The majority of the company's business functions were managed manually until recently. General Manager, Robert Hibbert began researching the market in 2003 for software that would help manage the services side of the business which accounted for approximately half of the overall business revenue.

"Although we needed a product specifically to help us manage our service division, we were really hoping to find an integrated solution that would tie in other areas of the busi-

ness too, like inventory and purchasing," says Hibbert. "What we found with Windward Software was a totally integrated solution. Our entire business is now managed from end-to-end using one comprehensive package".

Every area of the business is updated in real-time so all department views are accurate and up-to-date: point-of-sale, service, inventory, purchasing, receiving payroll, and accounting. Even our inside and outside sales representatives use it for customer relationship management."

Hibbert researched other products, like Accpac™ and Simply Accounting™. However, the products tended to excel in either the accounting side or the inventory side. Neither

product did both equally well. One product was unable to print invoices from inventory and the other was too modular which made implementation complicated and pricey.

Hibbert was impressed by Windward Software's total integration: "Because the software uses a single database, updates need only be entered once and are immediately applicable to all views of the database. There is no need to perform time-consuming manual updates throughout other areas of the software using printed reports for data comparison purposes. With Windward, we never need to worry that our inventory will be out of sync with our invoices.

**"The business has grown so much that without Windward's software solution, we simply could not function effectively! The software has become our business management foundation" - Robert Hibbert, GM.**

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-Robert Hibbert, G.M.

## Key Requirement - Service Centre Claim Checks

A key requirement for Westcoast Tools Sales & Service was the ability to generate Claim Tickets for items coming into the Service Repair Centre. With more than 500 items being repaired at any one time, it is not uncommon for a dozen or more of the same item type to be in the shop. It is critical to track items and their owners accurately and to ensure that the right repairs are being done to the right products, in a timely manner.

The intake and assignment process was improved with the introduction of printed claim tickets. “We simply print the tickets when the item arrives. Half goes to the client and half is attached to the product. The item can then be assigned to one of our technicians with detailed instructions about what needs to be fixed. Any staff member can then easily look up the owner, repair status, repair history, location and warranty information for each item.”

Hibbert says there are added benefits to this solution aside from unique item identification. He says clients feel special when they call in to check on their item or come to pick it up because the clerk has their whole history on electronic file. The G.M. says the ticket is also great free advertising, “It is like a business card because it contains the company logo, contact details, and people carry it around in their wallet.”

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## About Windward Software

Since 1984 Windward Software Inc. has specialized in developing integrated business management systems for businesses looking to improve their bottom line. With clients in over 22 countries around the world, we pride ourselves on being able to implement client-driven enhancements to the software.

Contact Windward Software today for more information about Windward’s OPE edition, and how your parts, sales and service business will benefit from a Windward Solution.

📞 toll free: 1.800.663.5750

🌐 online: [industrial.wws5.com](http://industrial.wws5.com)

## Return on Investment

### Staff Reduction

Old System: Two full-time accounting staff

Windward Software: One part-time person

### Purchasing

Process: service repair item would be taken off the shelf and a back order created for the purchaser who would then generate a purchase order.

Old System: 4 hours

Windward Software: 20 minutes

### Invoices

Old System: 1 day

Windward Software: under 1 hour

### Weekly Cheque Runs

Old System: 1 day

Windward Software: 2 hours

### Increased Sales

- The ability to track purchase patterns and generate relevant reports allows the company to anticipate customer needs and remain fully stocked with ‘hot’ selling items.

- Reports can be easily exported to Excel for more detailed analysis using the GRID export tool.

### Improved Customer Service

- The Customer Relationship Management (CRM) Tool provides immediate entry and access to full client history for faster inside sales and exceptional customer service.

- Invoice errors can be opened easily and fixed without having to issue credits. Secure access to the feature ensures that it can never be abused.

### Additional Benefits

Windward Software allows Westcoast Tools to take advantage of supplier cost-reductions by processing payments to meet supplier payment incentive deadlines. The system automatically deducts relevant percentages from the original supplier invoices and then automatically adjusts the cheque amount before printing.

