



WHO:

Air Filters, Incorporated

LOCATION:

Houston, TX

INDUSTRY:

Manufacturer of HVAC
Filters & Equipment

PROJECT:

Infor CloudSuite Industrial ERP
Implementation

DEPLOYMENT:

Cloud

RESULTS:

- Infor Mongoose facilitates simple and effective modifications
- Planning functionality simplified operations
- Cloud deployment allowed flexibility to work-from-home
- Scalability promotes future growth

ABOUT AIR FILTERS, INCORPORATED

Air Filters, Inc., is a specialty filter manufacturer in Houston, Texas. The company manufactures HVAC filtration, industrial ventilation, and air purification systems. Operating for over 65 years, the company holds patents for new filtration products and is continuously innovating.

OUTGROWING THE LEGACY SYSTEM

Air Filters, Inc., was running on a system built predominantly as a CRM and sales tool. The system had minimal manufacturing capabilities and was no longer supported by the vendor. While Air Filters, Inc., was able to customize some warehouse management capabilities into the system, it had many limitations.

By 2018, Air Filters, Inc., had outgrown the legacy system. The company hired an independent selection consultant for assistance in its search for an ERP system to suit its current needs and manage future growth. The selection firm interviewed each department and finalized the requirements. Covering all the bases from accounting to inventory to sales to manufacturing, it was determined that CloudSuite Industrial was the best fit. In May 2019, Air Filters, Inc., went live on CloudSuite Industrial.

WORKING WITH DRI

While Air Filters, Inc., opted for a self-guided implementation, Decision Resources, Inc., (DRI) assisted with training and kept the implementation on track. "Working with DRI was great," said Gary Travis, IT manager at Air Filters, Inc. "They have good a crew that covers every aspect of the product. When I needed help learning how to do some customizations, DRI provided knowledge of the product in all capacities."



CASE STUDY



Decision Resources, Inc.
Results. No Surprises.

BENEFITS OF CLOUDSUITE INDUSTRIAL

Air Filters, Inc., saw many immediate benefits from its new ERP system. In particular, the built-in planning capabilities simplified operations. The CloudSuite Industrial planning functionality allows organizations to balance supply and demand, set goals, and plan for revenues, margins, and costs of items sold. Most of this functionality was not available to Air Filters, Inc. in the legacy system.

Another key benefit was the flexibility and scalability offered with the cloud. When the COVID-19 pandemic shut down the United States in 2020, the transition to work-from-home was seamless for Air Filters, Inc. Because the company had deployed its new ERP system in the cloud, users were able to access the system from home. The cloud is also scalable, allowing for future growth. Unlike its legacy system, Air Filters, Inc., will not outgrow CloudSuite Industrial.

Air Filters, Inc., has also found that CloudSuite Industrial is a user-friendly and the department heads are well-trained in their areas of the ERP system. When a new employee is hired, the department handles the training of its staff. Intervention from IT is minimal and generally only occurs when new ideas are identified that require custom development.

INFOR MONGOOSE DEVELOPMENT PLATFORM IN THE CLOUD

While scalability, flexibility, planning, and user-experience were exceptional benefits, perhaps the most beneficial aspect of CloudSuite Industrial has been Mongoose. Mongoose is a development platform that allows users to quickly build and deploy custom applications with minimal coding. Mongoose is included as a part of the CloudSuite Industrial solution and provides a significant advantage to users deployed in the cloud. Use of Mongoose requires no knowledge of source code or programming language – allowing everyday users to quickly and easily develop applications to support their organization.

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With Mongoose, Air Filters, Inc., could modify the system to match the flow of its operations in areas where it didn't already. For example, customer forms were modified to add a "history" tab that included quotes, invoices, sales orders, and other pertinent information for the sales and customer service teams. While this information was available in CloudSuite Industrial, Air Filters, Inc., customer service reps would need to toggle between forms to access all the information they needed. Mongoose allowed the company to pull all the information into one tab within the customer form for easy access. This tweak sped up interactions, leading to more satisfied customers.

Air Filters, Inc., also used Mongoose to set up custom pricing models. The company breaks down its customers into five categories: commercial, industrial, OEM, distributors, and residential. Customers are identified by type within CloudSuite Industrial. Item quotes are modeled based on these types. Air Filters, Inc., built its own models to determine average pricing margins based on product type. This speeds up the estimate process by providing automated pricing margins for the sales team. Estimates are generated and recorded in the ERP system as they are created. When an override is required, it is automatically emailed to the sales manager.

THE FUTURE

The future is bright for Air Filters, Inc. Getting its business and operations cleaned up with CloudSuite Industrial has set the company up for future growth. And there has been no better time, as the company was recently acquired by a large organization. In the near future, Air Filters, Inc., will upgrade to version 10, the latest version of CloudSuite Industrial. The new capabilities of 10 coupled with the company's streamlined processes will set Air Filters, Inc., up for exceptional growth.

