

# CLIENT STORY



Company: Clean Coast Supply, LLC.

Products: Microsoft Dynamics 365 Business Central, ODT Rentals, ODT Service.

Industry: Safety & environmental supplies, industrial site services, and safety equipment rental.



Clean Coast Supply optimizes day-to-day operations after migrating to Dynamics 365 Business Central with ODT Rentals & ODT Service.

## Safety & Environmental Supplies Dealer Saves Time & Enjoys More Efficiency with New Integrated Software for Rentals & Service

### CHALLENGE

#### Clean Coast Supply Held Back by Disconnected, Manual Processes & Inefficient Software

Clean Coast Supply is a mid-sized safety and environmental supply company that provides industrial site services and safety equipment rentals. With two locations in Pasadena, Texas, Clean Coast Supply (CCS) was established in 2002 and started with providing products in environmental clean-up and emergency response. A few years ago, they expanded to offering equipment rentals to better accommodate their customers' needs.

The company had operated on Epicor Prophet 21 (P21) for many years. Operations were satisfactory at first with a small rental fleet. But as their fleet grew, it became quite difficult to manage the business using this software without an effective rental module.

“We just didn’t have the support and access to training we needed,” explains Lanna Scroggins, operations manager at CCS. “We did receive some brief training, but it wasn’t very good, and there was no online resource to access answers when we needed them. We were looking for ease of use, something that would be easier to train new employees on, where we could spend less time training them manually.”

The company migrated to Dealer Information Systems (DIS), but it was not user friendly for everyone on the team and they still lacked efficiency in processes and procedures. Only the rental manager really knew how to use the software. If they were out of the office, the team had to wait until the manager was back to bill their customers and get paid.

“Sometimes customers complained about what their invoices looked like and we weren’t able to change that, which was frustrating,” says Lanna. “It wasn’t very customizable and just didn’t fit our industry, so we only had it for a year.”

## SOLUTION

### Migrating to a New Software Solution with the Right Training & Support for Success

Again, the team began seeking a better ERP system that included all the features they needed, such as accounting, rentals, and service management, and especially something that was far easier to use. They connected with Open Door Technology at the end of 2022 and eventually chose a dual-phased migration to a new Dynamics 365 Business Central system, and then integrated in ODT Rentals, ODT Service, and Cosmos a short time later.

“Implementation wasn’t bad,” recalls Lanna. “We had two system migrations in two years and Business Central was the easier one because everything could just be put into a spreadsheet pretty easily and moved over. Phase 1 happened over a weekend in March 2023 if I’m not mistaken, and we were using it the next week. I mean, people were still struggling to learn DIS while we were switching to Business Central.”



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- Lanna Scroggins, Clean Coast Supply

As with any new system implementation, there were some learning curves and new setups the team didn't understand yet. But Open Door provided sufficient user training and continues to provide support as needed.

“Everyone we worked with at Open Door was really nice,” Lanna says. “It doesn't take your team very long to get back to me when I need help, so that is good.”

## RESULTS

### **Smoother Processes & More Accessible Data Gives Team a Better Snapshot of Financials**

Clean Coast Supply has been using Business Central with ODT Rentals and ODT Service since spring 2023. Lanna reports that their accounting processes have gone a lot smoother and more efficiently. The team is getting months processed and closed out quicker than they have in the past. They are also enjoying more visibility on sales data that they couldn't see before, such customer sales history, and bank reconciliations are more accurate and accessible.

“Business Central & ODT Rentals have come in and made processing a lot easier for everyone,” Lanna explains. “Processing quotes and other tasks like that have become efficient. We have a better snapshot of where we are financially. I can now see all of what we couldn't before and can pull reports and period billing up so we know in advance where we'll be in the future.”

Another noticeable improvement CCS has experienced is that the staff feel more supported and well-trained to use the new system. Lanna shared that everyone seems to like it as there are now multiple ways to find specific data and less steps are needed to process transactions.

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“The biggest draw was that there is so much support and resources online for Business Central users,” says Lanna. “Now the system is user friendly enough that our employees can just jump in and do invoicing, receive equipment, or get a quote out, and we don’t have to do any babysitting or checking anymore. So that’s big!”

The CCS team has recommended Open Door Technology to other colleagues in the industry. They are also looking to add more solutions to their system to further streamline processes and save time and money. For example, they’re planning to use a scanning app, Dynamics Ship, to help their warehouse minimize human error and function more efficiently.

“Absolutely, I think the new system will help us grow - especially when we eventually go online with a webstore,” explains Lanna. “We’ve already discussed with Open Door’s Sales staff what apps will make that a smooth process in future.”



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