

Connecticut Distribution Company Generates Quotes 10x Faster Using Microsoft Dynamics® GP + SalesPad

“I can confidently say that we can generate 10 times more quotes in a week using Microsoft Dynamics GP with SalesPad than we used to do in QuickBooks. Easily!”

Brandon Hall, President
Genex Turbine Technologies



Customer:
Genex Turbine Technologies, LLC

Web Site:
www.genexturbine.com

Location:
Manchester, Connecticut

Industry:
Distribution & Manufacturing

Former System:
QuickBooks

Customer Profile:
Genex Turbine Technologies (Genex), is a leader in the development of gas turbine component repair technology and a supplier of gas turbine replacement parts.

Highlights:

- Easy to use
- Generates quotes 10x faster
- Flexibility allows changes based on customer requests
- Gives team insight into each step in the sales process

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The Challenge:

Genex Turbine Technologies was using QuickBooks accounting software, but it lacked the functionality the company needed to handle multiple cost levels, detailed packing lists, and complex invoicing requirements. Plus, the team did not feel QuickBooks could effectively track and analyze information on previous sales needed to grow the business.

“From an accounting standpoint, QuickBooks is fine and very easy to use. But the sales, purchasing, quoting and inventory functionality is awful. We looked into QuickBooks Enterprise but it seemed it would not improve anything except make it easier to have multiple users. We looked at the popular third party applications for QuickBooks but did not think they were well done,” comments Brandon Hall, President of Genex.

Since QuickBooks was already showing signs it could not handle Genex’s business needs, the company decided it was the right time to put systems in place to plan for future growth. The company took advantage of the economic slowdown as the perfect time to invest and prepare for busier times.

The Solution:

The team at Genex felt confident that Microsoft Dynamics GP could provide the accounting functionality the company needed but was nervous that it might be too complicated after coming from a simple QuickBooks environment. They also wanted to be sure it could handle the more technical side of the distribution business.

When CAL presented Microsoft Dynamics GP with SalesPad, it was clear it was the right fit. Brandon Hall recalls: “SalesPad was definitely the reason we chose Dynamics GP. SalesPad is well thought out. The way you work through things and drill into information just make sense. It is easy to use; the information is right at our fingertips.”

Brandon Hall now says: “SalesPad is the most exciting tool I have to run my business. Microsoft Dynamics GP is the engine in the background, but SalesPad is the interface I use every day.”



CAL Business Solutions Inc. is a Microsoft Gold Certified Partner focused on Microsoft Dynamics GP (Great Plains) financial management systems. The company offers implementation, data conversion, customization, training and support to over 200 customers in 16 states.

- Serving customers since 1982
- Dedicated in-house development team
- Connecticut's only GP training center
- Six-time Microsoft Dynamics President's Club Member, recognized as the top 5% of Dynamics Partner worldwide
- Leading SalesPad implementation partner

"Microsoft Dynamics GP with SalesPad creates a state of the art distribution system that accelerates the entire sales process."

*George Mackiewicz, President
CAL Business Solutions*

Request a free ERP pricing guide at www.calszone.com/30questions

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The Benefits:

"Insight into Each Step of the Sales Process"

Genex has a complex multi-step quoting and bidding process. This used to be a labor-intensive manual process with multiple spreadsheets and documents. Now the entire process is set up and tracked in SalesPad, including automated workflow that pushes the quote through multiple steps of the process. It can also be used as a light CRM system to show interactions with a prospect, including date/time stamped notes to record all correspondence. "Now we all have insight into each step of the sales process. We can make sure business is booked and shipped, and we are ready to expand," says Hall.

"Able to Generate Quotes 10x Faster"

Earlier, the Genex team would waste time duplicating research efforts when unique parts were ordered. Now, company personnel can enter extensive notes linked to the part, and when it is ordered again, the information is already available in SalesPad.

Brandon Hall adds: "SalesPad helps us minimize the amount of work we have to do to keep quotes and orders rolling out of here. I can confidently say we can generate 10 times more quotes in a week using Microsoft Dynamics GP with SalesPad than we used to do in QuickBooks. Easily!"

"Able to Make Changes Based on the Customer"

The Microsoft Dynamics GP and SalesPad system is flexible and allows Genex to present quotes and invoices in many ways depending on the customer. "We do international business, so we need to change our invoices based on customer requirements. In SalesPad, we put orders in a "pro forma" queue and a "waiting for payment" queue, and it is easy to see what is going on with each order. Also viewing the history of inventory and item numbers has been a big plus for us," says Brandon.

"A Smart Business Decision"

Brandon Hall concludes, "I knew implementing new software was going to be painful but I had this vision that SalesPad was the right tool to help us make a lot of money, and I still believe that. Today, we are experiencing growth at an accelerated pace. I believe this software implementation is one of the smartest business decisions we have made to date. It is truly making our jobs easier."

As a growing company, Genex recognized the limitations QuickBooks was putting on its business. Its new Microsoft Dynamics GP + SalesPad system gives Genex the tools it needs to work more efficiently now, and take the company to the next level of expansion.

SalesPad is the most exciting tool I have to run my business...I believe this software implementation is one of the smartest business decisions we have made to date.

*Brandon Hall, President
Genex Turbine Technologies*