



**CUSTOM
BOTTLE**

Connecticut Distribution Company Increases Sales to Existing Customers Using Microsoft Dynamics® GP + SalesPad

“To be able to show our customers that we shipped 99% of their orders on time is very powerful. SalesPad gives us a better way to analyze our customer information and find ways we can increase business with them.”

*Barry Lerman, President & CEO
Custom Bottle, Inc.*

Customer:
Custom Bottle, Inc.

Web Site:
www.custombottle.com

Location:
Naugatuck, Connecticut

Industry:
Distribution & Manufacturing

Customer Profile:
Custom Bottle, Inc. manufactures and distributes plastic bottles and jars at its state-of-the-art facility in Naugatuck, CT, employing over 200 people.

Highlights:

- Easy to install with existing Microsoft Dynamics GP
- Detailed on-time delivery reports lead to increased business with existing customers
- Single-screen access to customer and sales data across 10 warehouses

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The Challenge

Custom Bottle was using Microsoft Dynamics SL (Solomon) but it had been heavily customized to fit its distribution and manufacturing requirements. Because of the extensive modifications, it was not able to take advantage of new releases, which left the company feeling stuck on old technology that was unstable.

Custom Bottle wanted a fresh start with a new accounting software package and strong core financial functionality out of the box.

The Solution

Although it looked at other packages, Custom Bottle felt Microsoft Dynamics GP offered the most features that fit its business without customization. After using Microsoft Dynamics GP for some time, the company added SalesPad. SalesPad was easy to install onto the existing GP system and presented the existing Microsoft Dynamics GP data in ways that made the Custom Bottle team more efficient. It also added a whole new business layer of business analytics, light CRM and workflow to the sales and purchasing process.

The Benefits

“Helps Us Increase Business with Existing Customers”

The sales reps now have the ability to see detailed sales reports, including sales graphs on customer cards. They can then email the sales history reports to customers to reinforce that Custom Bottle has been meeting their goals, making it easier to request more business.

“We wanted to track on-time delivery for the manufacturing facility, and SalesPad could do that very easily,” says Barry Lerman, President & CEO.



Microsoft Partner
Silver Enterprise Resource Planning

CAL Business Solutions is a Connecticut Microsoft Partner focused on Dynamics GP (Great Plains) financial management/ERP 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
- Dynamics GP training center
- Microsoft Dynamics President's Club Member, recognizing the top 5% of Dynamics Partners worldwide
- Leading SalesPad implementation partner

"SalesPad is the most exciting add-on to GP that I have seen in the last 10 years."

*George Mackiewicz, President
CAL Business Solutions*

Request a Free
ERP Pricing Guide at
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"Customers want to know you are doing a good job for them. To be able to show them that we shipped 99% of their orders on time is very powerful. SalesPad gives us a better way to analyze our customer information and find ways we can increase business with them. I feel confident it is increasing our business."

"Gives Us Single-Screen Access to All Our Data"

A main benefit of using SalesPad with its Microsoft Dynamics GP system is the increased visibility for customer service reps that do not access the Microsoft Dynamics GP financial system. With SalesPad, they are able to view all the customer information, sales history and purchase order information on a single screen in an easy-to-understand format. "The reality is that you plug in a customer's name and immediately get all the sales graph information, sales documents, quotes, AR history and contact details that you want, all in one screen," says Barry Lerman.

The sales team can now input orders faster, link sales orders to purchase orders, and share detailed notes between the two for added convenience. Then they can quickly check inventory across the company's 10 warehouses to determine the best shipping location.

"I Love Reviewing Customer Sales Graphs"

Custom Bottle takes advantage of powerful reporting features available in Microsoft Dynamics GP and SalesPad.

"Personally, I love reviewing customer sales graphs with my sales team to see how their accounts are doing versus what our plan was. Monthly reporting of sales and comparisons by month are so simple to get now. The 'Export to Excel' feature is fantastic too. I can easily send the Excel report to the customer or my sales team; it's a huge benefit."

"The CAL Support Team is Fantastic"

The support provided by CAL Business Solutions, a leading SalesPad Partner, has been a key contributor to the success of this project. Barry comments: "Our CAL Project Manager is fantastic. Whenever we call him, he comes back with a report showing what we want and how it will get done. And then he does it."

Because Custom Bottle extended its existing Microsoft Dynamics GP application to the rest of the organization using SalesPad, it has increased the amount of information employees know about customers and their orders. What Custom Bottle discovered was true for most companies: when employees who wouldn't normally use the ERP system are given access through SalesPad, it positively effects sales, deepens the relationship with customers, and adds value that positively affects the bottom line.

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*Barry Lerman, President & CEO
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