

Genex Turbine Technologies Generates Quotes 10x Faster Using Microsoft Dynamics® GP + SalesPad



“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



Genex Turbine Technologies, LLC

Location: Manchester, Connecticut

Industry: Distribution

Former System: QuickBooks

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 easy to use. But the sales, purchasing, quoting and inventory functionality is awful. We looked at the popular third party applications for QuickBooks but did not think they were well done,” says Brandon Hall, President of Genex.

QuickBooks was already showing signs it could not handle Genex’s business needs. Genex 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 makes sense. The information is right at our fingertips.”

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 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. “We can make sure business is booked and shipped,” 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.

“Able to Make Changes Based 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,” says Brandon.

“A Smart Business Decision”

Brandon Hall concludes, “Today, we are experiencing growth at an accelerated pace. This software is truly making our jobs easier.”

www.genexturbine.com

Microsoft Dynamics® GP + SalesPad - The Perfect Tool for Distribution Companies

Learn how three companies improved operations, customer satisfaction and ultimately their bottom line.



Warner Specialty Products

Material handling distributor and ergonomic equipment solutions provider with 10 employees.

Highlights:

- Process orders 50% faster.
- Workflow keeps quotes from falling through the cracks.
- Quick access to information increases customer satisfaction.
- More features for a lower cost than traditional GP system.

“SalesPad allows me to keep a good handle on what is going on at my company every day. If I have a question about an order, I can easily pull it up and get a full sales analysis report. Documents that used to disappear in a filing cabinet are now visible to every member of the team through every step in the process from quote to completed order.”

- Jack Norton, President

www.warnerspecialty.com

Custom Bottle

Manufacturer and distributor of plastic bottles and jars employing over 150 people.

Highlights:

- Easy to install onto existing Microsoft Dynamics GP system.
- Detailed on-time delivery reports leads to increased business with existing customers.
- Single-screen access to customer and sales data including inventory across 10 warehouses.

“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 customer information and find ways we can increase business with them. I feel confident it is increasing our business.”

- Barry Lerman, President & CEO

www.custombottle.com

Genex Turbine Technologies

Developer of gas turbine component repair technology and supplier of gas turbine replacement parts.

Highlights:

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

“SalesPad helps us minimize the amount of work we have to do to keep quotes rolling out of here. I can confidently say that I can generate 10 times more quotes in a week using Microsoft Dynamics GP with SalesPad than I used to do in QuickBooks.”

- Brandon Hall, President

www.genexturbine.com



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.



Warner Specialty Products Reduces Order Processing Time by 50% Using Microsoft Dynamics® GP + SalesPad



“Now, when a customer calls to check the status of an order, we have the information at our fingertips. It makes us look good to our customer when we can give them a complete answer right away.”

*Penny Anderson, Office Manager
Warner Specialty Products, Inc.*



Warner Specialty Products, Inc.

Location: Cheshire, Connecticut

Industry: Distribution

Former System: Macola

The Challenge:

Warner Specialty Products felt its Macola accounting software was not flexible enough to fit its business model as a sales-oriented distribution company. The company does not manufacture or stock inventory. It is a dealer for many manufacturers as well as engineers custom material handling products to fit the customer's needs. The goal was to have one integrated yet affordable system to make the entire sales process more efficient.

The Solution:

“SalesPad allows us to do quotes exactly the way we needed; the combination of Microsoft Dynamics GP with SalesPad was a perfect fit,” says Jack Norton, President of Warner Specialty Products. “Using SalesPad also reduced our software cost as only a few of us need full access to the financial data in GP. Everyone else uses a less expensive SalesPad license. We got better functionality at a lower cost than a traditional GP system.”

The Benefits:

“Able to Process Orders 50% Faster”

Warner Specialty Products processes an average of 15 quotes and 10 orders per day. With Macola, at least 2 hours a day were spent rekeying data and proofreading for errors. Now, with the click of a button, the order is created instantly, with no mistakes. Warner was able to reduce the cost of one full-time employee dedicated to data entry and AP.

“In our old system, adding or deleting items from a quote would take 20 minutes. Now it takes 2 minutes in SalesPad,” says Kevin Almeida, Inside Sales Associate.

“Keeps Quotes From Falling Through the Cracks”

Because of the complex sales cycle, the workflow features in SalesPad are very important. “SalesPad gives us reminders so steps do not fall through the cracks like they did in Macola. I know exactly which quotes are waiting for drawings or approval. And when one is complete, SalesPad automatically moves it to the next step based on our workflow rules,” says Kevin Almeida.

“Complete Visibility During the Entire Sales Process”

“Using the Sales Monitor in SalesPad allows me to keep a good handle on what is going on at my company every day. If I have a question about an order, I can easily get a full sales analysis report. Documents that used to disappear in a filing cabinet are now visible to every team member through every step in the process,” says Jack Norton.

“Makes Us Look Good to Our Customer”

Penny Anderson, Office Manager, comments: “Now, when a customer calls to check the status of an order, we can see what stage the order is in at any given moment, plus who entered it and all their related notes. We are not fumbling with paper, or putting the customer on hold.”

“Much Easier To Use Than Our Old System”

The training and support provided by the CAL Business Solutions team were invaluable. “SalesPad was easy to learn. Within 2 weeks we were flying through orders quickly,” says Alex Piscatelli, Inside Sales Associate.

www.warnerspecialty.com

Custom Bottle Increases Sales to Existing Customers Using Microsoft Dynamics® GP + SalesPad



“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 you want, all on one screen.”

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



Custom Bottle, Inc.

Location: Naugatuck, Connecticut

Industry: Distribution, Manufacturing

Former System: Solomon

The Challenge:

Custom Bottle was using a heavily customized Microsoft Dynamics SL (Solomon) to fit its distribution and manufacturing requirements. 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.

The Solution:

Microsoft Dynamics GP offered Custom Bottle the most features that fit its business without customization. After using Microsoft Dynamics GP for some time, the company added SalesPad, which was easy to install onto the existing GP system and presented the existing Microsoft Dynamics GP data in ways that made the company more efficient. It also added a new layer of 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.

“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 is the increased visibility for customer service reps that do not access the main Microsoft Dynamics GP financial system. With SalesPad, they are able to safely view all the customer information, sales history and purchase order information on a single screen. 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. Barry comments: “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.”

“The CAL Support Team is Fantastic”

Barry adds: “Whenever we call our CAL Project Manager him, he comes back with a report showing what we want and how it will get done. And then he does it.”

www.custombottle.com