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

> "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. Easily!

Brandon Hall, President
Genex Turbine Technologies

Customer:
Genex Turbine Technologies, LLC

Web Site:
www.genexturbine.com

Location:
Manchester, Connecticut

Industry:
Distribution

Former System:
QuickBooks

Customer Profile:
Genex Turbine Technologies, LLC, (Genex), located in Manchester, Connecticut, 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

CAL Business Solutions Inc.
860.485.0910
sales@calszone.com
www.calszone.com

The Challenge

Genex 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. The team also did not feel QuickBooks could effectively track and analyze enough information on previous sales to help 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. I looked into the QuickBooks enterprise but it appeared to me it would not improve anything except make it easier to have multiple users. I looked at the popular third party applications for QuickBooks but did not think they were well done," comments Brandon Hall, President of Genex.

Genex has plans for steady growth. Since QuickBooks was already showing signs it could not handle Genex's business needs, the latter decided it was the right time to put systems in place to plan for future growth. It 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. The team 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 Microsoft 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 Provider...
moving you forward.

Microsoft Partner
Silver Enterprise Resource Planning

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 all interactions with a prospect, including date/time stamped notes to record all correspondence.

"Now I feel that 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."

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

"Going To Help Us Make a Lot of Money"

Brandon Hall concludes: "We are a small business with a lot of growth potential. I knew implementing new software was going to hurt, but I had this vision that SalesPad is what is going to help us make a lot of money, and I still believe that. Today, even though we are not making that kind of money yet, I can see that this is going to do it for us. It is truly going to make our job easier, and it already has."

As a growing company, Genex recognized the limitations QuickBooks was putting on its business. Its new Microsoft Dynamics GP with SalesPad system gives the Genex team 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. Microsoft Dynamics GP is the engine in the background but SalesPad is the interface I use every day.

Brandon Hall, President
Genex Turbine Technologies