



Connecticut Distributor Reduces Order Processing Time by 50% Using Microsoft Dynamics® GP + SalesPad

“SalesPad allows me to keep a good handle on what is going on at my company every day. Documents that used to disappear in a filing cabinet are now visible to every team member through every step from quote to completed order.”

*Jack Norton, President
Warner Specialty Products, Inc.*



Customer:
Warner Specialty Products, Inc.

Web Site:
www.warnerspecialty.com

Location:
Cheshire, Connecticut

Industry:
Distribution

Former System:
Macola

Customer Profile:
Warner Specialty Products, Inc. is a material handling distributor and ergonomic equipment solutions provider with 10 employees.

- Highlights:**
- More functionality for a lower cost
 - Processes orders 50% faster
 - Access to data leads to better customer service
 - Visibility of projects from quote to completed order

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 stock any inventory or manufacture any products. It is a dealer for many manufacturers as well as engineers custom material handling products to fit the customer's needs. Each quote includes multiple steps and complex tracking, which was being managed by spreadsheets and manual processes. The goal was to have one integrated yet affordable system to make the entire sales process more efficient.

The Solution

After looking at several packages, Warner narrowed the choices down to Sage Mas90 and Microsoft Dynamics GP. “The way SalesPad allows us to do quotes is exactly what 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 the software cost because only a few of us need full access to the financial data in GP. Everyone else uses a less expensive SalesPad license. So we felt we got better functionality for 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. In fact, the new Microsoft Dynamics GP + SalesPad system made the process so much more efficient and automated, Warner was able to reduce the cost of one full-time employee dedicated to data entry and AP.

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*

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“In our old system, adding or deleting items from a quote was a long process. This single step that used to take 20 minutes in Macola, now takes 2 minutes in SalesPad,” says Kevin Almeida, Inside Sales Associate. “Overall, I feel we can process orders 50% faster now, thanks to SalesPad.”

“Workflow 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 in the process based on our workflow rules,” says Kevin Almeida.

“Complete Visibility During the Entire Sales Process”

“For me as an owner, 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 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,” 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 have the information at our fingertips. 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. It makes us look good to our customer when we can give them a complete answer right away.”

“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. And it is much easier to use than our old system,” says Alex Piscatelli, Inside Sales Associate. Penny Anderson adds: “The CAL Business Solutions team has been tremendous.”

Warner Specialty Products had a common problem: old, outdated software and business processes, and the bottlenecks that came with them. The company set out to upgrade its ERP system, but got more value for its software dollar. Using Microsoft Dynamics GP + SalesPad, it has improved time to customer, reduced overhead costs, and achieved a level of visibility on its order process that would have been impossible otherwise. For this small distribution company, implementing Microsoft Dynamics GP + SalesPad means it can serve its customers better now and as its business grows.

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.*