

Client

Tech Trading / DPI
techtradinginc.net

Type of Business:

Wholesale distributor of
copy and printer supplies

Number of Locations: 1

Number of Employees:
45

AccountMate Users on
System: 30

AccountMate Modules:

- Accounts Payable
- Accounts Receivable
- Customer Inventory
- General Ledger
- Inventory Control
- Pricing Control
- Purchase Order
- Return Merchandise
Authorization
- Sales Order

3rd Party Applications:

ACCU-DART
RedTail Solutions
Sales Analysis

"AccountMate will be crucial for our organization as we strive to be the industry premier low cost, specialty distributor of name brand copier and fax supplies."

– Brian Tedesco,
President, Tech Trading

Wholesale Distributor Capitalizes on AccountMate's Inventory Control Software to Increase Profitability

Tech Trading is a wholesale distributor in the highly competitive copier and printer supplies industry. In order to grow and stay profitable, Tech Trading needed a scalable and customizable business system that would provide information to operate efficiently, handle high volumes and generate profits on very tight margins.

The Challenge

Tech Trading was operating with outdated proprietary software for sales order, purchase order, inventory control and accounts receivable. EDI, General Ledger and Accounts Payable were not integrated. Warehouse processes for receiving, storing and shipping 3000 products were manual operations. Tech Trading management knew that further investment was needed to stay competitive and grow the business.

Customer retention in this industry is based primarily on competitive prices and reliable order fulfillment. The software systems, manual warehousing, standalone shipping and EDI systems needed to be replaced.

The Solution

Steve Rosenstein and Bill Papanestor of Figtree Consulting, Inc. worked closely with Tech Trading management and staff to build a system that streamlined Tech Trading sales and warehouse procedures. Figtree started with the AccountMate accounting system because it could be modified and enhanced to exactly fit Tech Trading's requirements. Plus, it provides an order entry system that allows for quick data entry and was easy to learn. The enhancements provide the immediate, interactive information needed to make profitable sales decisions.

Tech Trading required a sales order solution capable of automatically allocating available inventory to sales orders on a first come, first serve basis with the ability to override allocations. Automatic commitment of inventory to orders and printing of pick lists, consolidation orders, automatic credit hold, multi-level pricing and enforcement of minimum prices and minimum margins were essential to staying profitable.

The old system required entering purchase order receipts four to six hours after receiving goods. This was not acceptable, nor competitive. Real-time updates to the inventory system for warehouse receipts, bin transfers and picking was implemented in order to book orders as well as to commit the product to open sales orders.

Tech Trading has thousands of items in inventory. AccountMate's sophisticated inventory control gave Tech Trading many of the features that they need to help them manage their business. Figtree integrated ACCU-DART software to simplify and provide real-time shipping and receiving from the warehouse with the accounting system. Container and pallet content information is captured using the handheld terminals.

The RedTail Solutions EDI interface was enhanced to include Tech Trading specific business rules for importing trading partner purchase orders into the Sales Order module. The time consuming and cumbersome batch files used to run exports and imports were replaced by this fully integrated EDI solution. Importing EDI purchase orders, maintaining cross reference tables and handling exception reports is now a simple clerical function. Figtree's AccountMate add-on, Sales Analysis Reporting, helps manage sales by providing an accurate picture of sales by sales rep, product line and customer. It provides comparisons of dollars, units and margin.

The Result

The AccountMate solution, together with best-of-breed vertical applications, provided a better information system which allows Tech Trading to operate more efficiently, handling more volume at higher profits.

About Third Party Applications

ACCU-DART—ACCU-DART is a real-time warehouse & inventory management solution that is designed to integrate directly with AccountMate. Using radio-frequency, bar-code technology, it allows the warehouse staff to instantly update the AccountMate accounting system, ACCU-DART functionality includes: shipping sales orders, receiving purchase orders, put aways, picking, bin transfers, warehouse transfers, bin replenishment, physical counts, serial/lot control and more. www.accu-dart.com

RedTail Transaction Manager—RedTail Solutions is an out-sourced EDI service that enables companies who work with large trading partners in such industries as retail, grocery, manufacturing, and automotive to become EDI-compliant with their large trading partners. RedTail Transaction Manager enables the supplier to receive, review any electronic purchase orders and send them directly to their AccountMate accounting system. Likewise, invoices and shipping information are automatically routed back through the RedTail Transaction Manager for transformation and forwarding to the corresponding trading partner. www.redtailsolutions.com

Sales Analysis Reporting—This powerful yet simple to use Sales Analysis reporting module provides a wide range of reports (by customer and product or product line, by customer and salesperson, one year versus another, one year versus projections and more). It shares the same interface as all AccountMate reports and requires no additional training. www.figtree.com

About Figtree Consulting, Inc.

Figtree believes that an accounting system should increase profitability, add management control and streamline business processes. Each client is unique and requires a system appropriate to its needs. Developing a business system is a joint effort between the members of Figtree's professional staff and their clients. Figtree can be reached at www.figtree.com.

About AccountMate

Founded in 1984, AccountMate develops and markets fully customizable business management software designed to meet the growing needs of small to medium-sized businesses. Systems range from single user versions to those that support over hundreds of users simultaneously. AccountMate software is available for local installations or cloud deployment. It is distributed exclusively through a worldwide channel of authorized solution providers. AccountMate can be reached at (800) 877-8896 or www.accountmate.com.

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