

CBSi Client Success Story

\$145,000 Annual Savings from Dynamics NAV Software Investment

Client - Dallas based distributor of consumer products

- 34 years in business, had achieved 350% in growth since 1996
- B2B business model, selling to dealers authorized to sell their products

Return on Investment

- **Cut \$85,000 per year** in personnel costs by eliminating 2 data entry positions the first week of go-live
- **Extended time** for accepting Sales Orders for same day shipping, from 3:30 p.m. to almost to 5 p.m.
- **Saved \$60,000 per year** in supply costs by using less paper.
- **Eliminated time** needed to key in freight amount and tracking #'s from UPS and FedEx and eliminated inaccuracies since this information automatically populates into sales orders / invoices.
- **Eliminated holding** invoices and packing slips for the new month until the previous month was closed.
- **Shaved days off** closing out the month - Controller's job was made easier as the month is now closed within a day, compared to 3-4 days in the past.
- **Time saved** in procurement, by using the NAV purchase requisition worksheet which automatically suggests and creates purchase orders.
- **Packing mistakes reduced** by using bar code scanning and verification process during shipment.
- The president can now view the Income Statement throughout the day to analyze progress and spot potential errors.
- Fast sales order entry system supporting 10 in-house sales people. Director of sales says that they are **"Light years ahead, compared to where we use to be."**
- Each sales person now has hours more per week to perform direct sales functions.
- Immediate access to customer sales and pricing history inquiry during sales quote process with single click
- Managing customer returns for credits, exchanges, or defective product is greatly simplified.

- Quickly pulling up viewing scanned images of customer contracts, purchase orders, etc. is more convenient since they may be attached to any area of the sales and purchase order process within Microsoft Dynamics NAV.
- The change log, which optionally tracks any kind of changes, adds, & deletions in the system, by user, has been very beneficial to the President.

During the process of selecting software to meet their business needs, the president, vice president, and sales and accounting departments evaluated *Infor*, *Prophet 21*, and *Dynamics GP (Great Plains)* before selecting **Dynamics NAV** and **CBSi Services** as their preferred solution to meet their business needs.

Customer Benefits

- Customers receive automatic e-mail notifications upon shipment, including package tracking id's.
- Online web store enables customers to:
 - Place orders online, which automatically appear in Dynamics NAV
 - Query product availability
 - Find out order status
 - Reprint invoices
- Improved efficiencies in finding customers, items, and other records within the system with unlimited, fast search features which previously could only be found by name, address, telephone or contact information.

Financing

Cash and existing credit lines were preserved by using Microsoft financing for both **Dynamics NAV** and **CBSi Services**.

Next Step – Leap Ahead

Learn more about what CBSi can do for you, call 972.612.1122 or e-mail sales@cbsi-corp.com.

www.cbsi-corp.com



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