

## CBSi Client Success Story

### Manufacturing & Distribution Software Implementation

This client has been a manufacturer and distributor of agricultural and related industrial plastic and steel components for the last 30 years. They are a fast growing, profitable company, having doubled their sales, worldwide over the past 4 years. Their 200,000 square foot state-of-the-art facility in Dallas has plastic injection molding, plastic sheet fabrication, and metal fabrication departments and a well-stocked warehouse for immediate shipment around the world.

After a previous attempt to replace their existing accounting system failed, the client was especially wary of replacing their software, which had become the lifeblood of the company despite its limitations. Additionally, the president's personal research had shown that most software implementations of this kind significantly exceed the budget, so he was especially sensitive to potential cost overruns.

After a careful selection process for both software and provider, the client chose Microsoft Dynamics NAV and the services of CBSi. The project was completed on time and *under* budget, including data conversion, implementation, customization for unique needs, and training.

#### Project Return on Investment:

- 18 days saved by automatically creating, scheduling, and emailing Excel reports
- 50% improvement in number of days to close the month
- 2 hours saved daily via automatic printing of UPS, FedEx, LTL shipping documents - a person no longer has to stay late into the evening for shipping.
- Eliminated need to have personnel manually preparing report documents to recap the daily sales and bookings
- Greater visibility into production
- Improved efficiencies in finding customers, items, and other records within the system by using unlimited, fast search features
- Allowing continued growth without adding staff
- Additional ROI's are being determined as client uses the system longer

#### Project results:

- A single knowledge base of company-wide information related to a variety of accounting and non-accounting information available to everyone with a need to know
- Rapid sales order entry system to support a dozen in-house sales people
- Full customer sales and pricing history during quote and sales process
- Implementation across several companies with different year ends
- Financial statements by cost center, item class, product type, territory, salesperson, customer class, and production machine

- Automation of UPS, FedEx, and LTL shipping labels, commercial invoices, package tracking, and manifests
- Able to see tracking numbers, etc. online.
- Easy reporting via automatically created and emailed Excel reports
- Automatic sales quote follow-up via email
- Purchase order approval workflow
- Ability to change and update Quotes and Orders instantly
- Ability to attach documents, images, and other files to many areas of the sales and purchase order process to quickly view this information within Microsoft Dynamics NAV

### **Financing:**

Cash and existing credit lines were preserved by using Microsoft financing for both software and CBSi services.

### **Next:**

Learn more about what CBSi can do for you, call 972.612.1122 or visit us at [www.cbsi-corp.com](http://www.cbsi-corp.com).

See other software implementation success stories at <http://www.cbsi-corp.com/services/success.asp>.

