SALESPAD™ DESKTOP

Case Study
AUBREY ORGANICS

PRODUCTS USED

SALESPAD DESKTOP

The Company   Aubrey Organics, Inc. is a Tampa, Florida-based manufacturer of all-natural, certified organic fragrances, cosmetics and other personal care products.

Founded in 1967, Aubrey Organics now produces over 200 natural hair, skin, and body care products sold in health stores across the US and Canada, as well as throughout Europe, Asia, and South America. The company's extensive catalog and commitment to customer service requires a robust software solution that can handle a variety of sales and customer relations tasks.

The Challenge   Aubrey Organics has been using Microsoft Dynamics™ GP since 1997. By the end of 2009, due to Microsoft's software support timeline and the company's growing produfct line, Aubrey Organics was ready to make some changes and upgrade from version 8.0 to version 10.0. At this time, the company selected InterDyn CFO Consulting, a Microsoft Gold Certified Partner, to help with the enhancement.

With their knowledge of Dynamics GP and ability to offer a comprehensive overview of Aubrey Organics' sales process, the team at InterDyn CFO was able to help Aubrey Organics get maximum usage out of the Microsoft Dynamics GP system. But Microsoft Dynamics GP alone no longer fit the company's needs. Aubrey Organics' 12-person call center relied on a multi-level process for their sales, which involved several customizations.

Aubrey Organics needed to update and simplify their setup in order to reduce order entry time and better handle their unique special pricing needs. After a review of the company's systems, InterDyn CFO was able to offer a solution.

The Solution   **SALESPAD DESKTOP** The InterDyn CFO team determined that SalesPad Desktop, an independent software system from SalesPad LLC, would simplify Aubrey Organics' data & order entry steps out of the box and provide increased functionality to better assist their sales and customer service reps. SalesPad Desktop, which seamlessly integrates with Microsoft Dynamics GP, is the perfect fit for Aubrey Organics. SalesPad provides a one-step screen to place a sales order, making order entry much quicker and easier than the multiple windows that reps previously worked through for each transaction. With customer history, order tracking, CRM, and special discount capabilities all in one place, SalesPad Desktop streamlines Aubrey Organics' workflow process, eliminating the need for additional custom add-ons.

AUBREY® ORGANICS

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KEY BENEFITS OF SALESPAD DESKTOP

- Easier order entry
- Access to customer info
- Cost savings

> ## "WE'RE INCREDIBLY PLEASED WITH HOW SALESPAD HAS STREAMLINED OUR ENTIRE ORDER ENTRY PROCESS."
>
> **Debrona Turnage**, Customer Service Supervisor, Aubrey Organics

The Benefits **EASIER ORDER ENTRY** Before SalesPad, Aubrey customer service reps had to proceed through five to seven windows before even beginning to enter an order. Debrona Turnage, Customer Service Supervisor at Aubrey Organics, says order entry, along with accessing account holds, tasks, and other necessary customer information, used to take up to 15 minutes. But with SalesPad 's built-in customer notes pop-up and tasks checklist, order entry time has been reduced to three to five minutes total. "We're incredibly pleased with how SalesPad has streamlined our order entry process,"Debrona says.

ACCESS TO CUSTOMER INFO Before SalesPad, customer service reps couldn't see CRM notes while placing an order, which was problematic at times. For example, Debrona explains, "If a customer was on hold, it would take several minutes to determine why. Now we can access everything we need directly from the transaction. With SalesPad, everything is right in front of us on the customer card."

SAVINGS With SalesPad as the solution, Aubrey Organics benefits not only from reduced order entry time and increased functionality, but increased cost savings as well. In addition to eliminating the need for add-on customizations to GP, implementing SalesPad allowed Aubrey Organics to reduce GP user count by nine. SalesPadhas a substantially lower per-user cost than Dynamics GP, and because it integrates completely with GP, many users do not need to operate in both programs. "We're pleased with the savings, and customers are pleased with the time they save too. Having our reps operate in SalesPad makes everyone happy," says Debrona.

SALESPAD™