

Case Study

Steiner Tractor

PRODUCTS USED

SALESPAD DESKTOP | SHIPTO



THE COMPANY With over 4,800 replacement tractor parts in their catalog, Michigan-based distributor Steiner Tractor Parts is dedicated to preserving antique farm tractors and providing exemplary customer service.

THE CHALLENGE The Steiner Tractor Parts team had been successfully using Microsoft Dynamics GP for 18 years, but their order entry method needed improvement. For most of those years, customer service reps wrote phone orders on paper and gave them to another person who could enter them into Dynamics GP, a method E-commerce manager Elizabeth Gross describes as “cumbersome”. The company’s substantial growth over the last 10 years further complicated this challenging method, so in 2009 they began using their website for order entry. The new process worked better, but was still limited and slow to load, says Elizabeth.

THE SOLUTION SalesPad Desktop. With the help of their Microsoft partner, The TM Group, the Steiner team discovered that SalesPad Desktop, which integrates seamlessly with Dynamics GP, could not only streamline their order processing, but could solve a number of other pains the company was experiencing. “We looked at SalesPad and found that it had a lot of flexibility,” says Elizabeth.

Flexibility, and versatility. SalesPad functions in Steiner Tractor’s Marketing, Sales, Management, Shipping, Purchasing, and Receiving departments. Because of this versatility, Elizabeth says SalesPad’s first impact was on training. “Instantly, training was easier...we were using a number of separate systems in the past. Now, they only need to learn SalesPad,” she says.

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KEY BENEFITS OF SALESPAD DESKTOP

- Usefulness across multiple departments
- Increased efficiency and reduced costs
- Automated workflow
- Visibility and control
- Integration with UPS & FedEx
- Customizable

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Elizabeth Gross, E-Commerce Manager, Steiner Tractor Parts

SAVED POSTAGE One pain the Steiner team was looking to solve was their printing volume. SalesPad allows users to email and fax invoices individually or by batch, which Elizabeth confirms has both reduced how much Steiner has to print, and saves the company money on postage costs. Elizabeth says the team is “very excited” about these capabilities.

AUTOMATIVE WORKFLOW Prior to SalesPad, Elizabeth says the Steiner team “did a lot of manual checking and verification of every order in the past.” SalesPad has been able to simplify the process for them. “We now use workflow to identify exceptions that need to be reviewed and various staff members are assigned to check on different batches,” she says. With SalesPad, Steiner Tractor now has a fully automated workflow.

Steiner Tractor has also integrated web ordering with SalesPad workflow. Elizabeth explains, “We bring all of the web orders into a batch called ‘Web Orders.’ From there, we use SalesPad workflow to identify exceptions that need review and allow the orders to flow through the process.”

SHIPMENT TRACKING Along with chief product SalesPad, Steiner Tractor also uses SalesPad Solutions’ ShipTo, which integrates sales documents for shipping with UPS and FedEx. Elizabeth especially likes the visibility ShipTo brings to tracking packages. “We never wrote back tracking numbers to GP before; having the ability to see the tracking numbers immediately after shipping has been really beneficial to staff and customers,” she says.

CUSTOM FREIGHT QUOTING SalesPad developers created a customized function that calculates shipping costs during quote entry, allowing the team at Steiner to provide a freight quote up front rather than after an order is placed. “We have items that vary in size from a few ounces to several hundred pounds, so we have some fairly complex shipping needs,” Elizabeth explains,

“We wanted to be able to authorize the credit card for the full amount of the order, including shipping charges. Customers don’t like to be surprised with a shipping cost after placing the order; giving the quote up front improves customer satisfaction. We are very pleased with the way that SalesPad designed this solution; it is flexible and easy to modify.”

AUDIT TRAIL RECORDING The Steiner team also benefits from SalesPad’s auditing features, which record modifications to documents and purchase orders. “Now [we] can see where an order has been and what happened to it. This is critical for customer service,” says Elizabeth. Using ShipTo, they developed a way to view exactly who shipped an order and any customer service reps who accessed the order. “This has helped identify areas where there are problems and where we need to do additional training or make modifications to the workflow,” she explains.

EASY UP-SELLING The team at Steiner Tractor continues to learn additional ways to benefit from SalesPad. They are beginning to use Item Sales Options, which Elizabeth predicts will help increase profit from up-selling. SalesPad’s Item Sales Options feature allows custom details and additional selections to be added to items during order entry. Customer service reps see the configured options when entering a line item, and can offer add-ons or ask customers to make choices based on the selected item. Elizabeth says, “I have high hopes that it will create some [sales] increases. It is powerful for the CSRs to be able to up-sell items while they are on the phone.”

OUTSTANDING SUPPORT Elizabeth loves what SalesPad software has done for Steiner Tractor’s business, but she also appreciates the responsiveness of the SalesPad team. She says, “The support team at SalesPad is top notch. [They] have all been instrumental in helping us to really utilize SalesPad to its fullest potential. Each person that we have dealt with ... has been friendly, knowledgeable and quick to help.”