



Trek Global

**Streamlining Your Order Process
with Cloud ERP**

Overview

We're going to explore some of the challenges and solutions with streamlining your order process:

- Mobile Order Taking
- Management of complex price lists
- Providing complete information to your sales team
- Efficiency in your order fulfillment processes
- Customer Service

Mobile Order Taking: Challenges

Sales teams are often on the road

- Trade shows, meetings with customers
- Disconnected from financial and ERP data

Without access to data, sales teams don't know what they can promise

- No insight to inventory availability
- Have to take hand orders
- Result is delayed fulfillment, risk of mistakes in what is promised
- Dissatisfied customers

Mobile Order Taking: Solutions

Benefits of Cloud ERP systems:

- Gives sales teams excellent mobility
- Access via a tablet or other mobile device
- While off-site, can check inventory, sales history, price lists



Sales teams can negotiate better terms

- Know what they can promise and deliver
- More accurate estimates of delivery time

Allows for faster fulfillment

- Enter order while with customer
- Improved efficiency – order processes right away
- Better service, increased customer satisfaction

Price List Management: Challenges

Increasing number of channels

- Webstores
- Amazon store
- eBay store

Greater complexity to manage price lists

- How to make sure prices are tied to costs
- Need to be able to identify margin

Price List Management: Solutions

Cloud ERP solution with complex price generation system

- Evaluates main cost of product
- Generates price that builds in your margin
- Prices for your different needs
 - Wholesale price versus general retail at a percentage difference
 - Special negotiated pricing for specific customers
 - Discounts based on flat rate
 - Discounts based on break level (quantity or price reached)

Sales Team Insights: Challenges

Sales has limited data when CRM is disconnected from ERP system

- Loses track of their leads once they become customers

Sales Team Insights: Solutions

Cloud ERP integrated with CRM

- See customer history
- Past orders, quantities
- Status of current orders, invoices

Opportunities to up-sell, cross-sell

Better service to customers based on effective interactions

Order Fulfillment: Challenges

Successful web store

- Great customer traffic
- Good presentation
- Effective sales process
- High volume orders

Order management not addressed by webstore

Efficient fulfillment is an issue

Order Fulfillment: Solutions

ERP integrated with webstore

- Pulls orders directly into ERP from webstore
- Eliminates data-entry, reduces labor
- Keeps inventory updated and accurate
- Improves process efficiency
- Data flows from orders all the way through shipping and inventory

Improved Customer Service

With ERP integration, automated communications are now possible

- Order has been placed
- Credit card has been charged
- Order has been shipped



For more information on this topic, listen to the full audio podcast: trekglobal.com/podcasts/streamlining-your-order-process

Additional topics can be found at: trekglobal.com/podcasts