

BELLA BATHROOMS AND TILES GET THE FORMULA RIGHT, thanks to Sage Intelligence Reporting



Customer

Bella Bathrooms and Tiles

Industry

Construction, Retail

Location

South Africa

System

Sage Pastel Partner and Zoho CRM

Time going down the drain

Bella Bathrooms and Tiles is a South African company that provides local and international bathroom-ware, furniture, accessories and tiles to clients in sub-Saharan Africa. Their wide range is available to interior designers, architects, developers and retail customers.

Although successfully using Sage Pastel Partner in conjunction with Zoho CRM Systems, Bella Bathrooms and Tiles still faced several, time-consuming reporting challenges. Firstly, most of their inventory related reports could not provide accurate stock counts of products that were already listed in sales orders and purchase orders, and they needed to know which products were overstocked. They also wanted a quick and accurate view of outstanding products by customer, to save time and provide a more efficient service. One of the outcomes they wanted most

from their reporting solution was the ability to generate quotations in Microsoft® Excel® that featured pictures of the products alongside each item. They further needed to export data from Sage Pastel Partner in a certain format so that they could import it into their online Zoho CRM system.

Above all, Bella Bathrooms and Tiles wanted to cut the time spent by salespeople on administration. Quotations are key in this company's sales process; where almost every customer requests a written quotation. This should be a simple process, however it was taking far too long to format each and every quotation into the Bella Bathrooms and Tiles template. Director, Deon Katzen also states that it took too long to calculate all the products that had to be ordered on a specific day. In a sales situation, the best tool is information, yet this sales team couldn't access the information they needed, when they needed it.

sage Pastel Intelligence Reporting

Sage Intelligence Reporting gets the formula right

Bella Bathrooms and Tiles knew that they wanted to keep Sage Pastel Partner, but they wanted the data it provided formatted in a specific way, and they wanted the resulting reports to run on a daily basis. After researching their options, Sage Intelligence Reporting quickly became an obvious choice because of its clean integration with Sage Pastel Partner. However, the biggest obstacle for the company was to get the reports in the exact format that would work for them. This is where their Sage Pastel business partner, Auto Excel, stepped in, using their experience and specialist knowledge to produce the very specific report layouts and formatting required.

"We are very happy with the outcome," says Deon Katzen,

of the successful implementation of Intelligence Reporting. All reports the sales staff need (especially the inventory reports) are now scheduled to run every evening, which makes it easier in knowing which products have to be restocked for customers. In addition, they can provide quotes which feature pictures of the products in question, and can easily import data into Zoho CRM. "The team can now produce quotes efficiently and quickly, and because the quotes feature graphic images of each product, they have become the effective tools we wanted them to be," adds Deon. They're also on top of overstocking now that they have accurate and meaningful inventory reports.

The best aspect of Sage Intelligence Reporting for Bella Bathrooms and Tiles? They love that the reports are delivered in Excel. This familiarity has meant an easier adoption of the system, meaning that they could enjoy the time-saving benefits from day one.

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Deon Katzen, Bella Bathrooms and Tiles, Director

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