

# Horizon Spa & Pool Parts makes big splash with Sage Software



## Customer

Horizon Spa & Pool Parts, Inc.

## Industry

Spa and pool parts wholesale

## Location

United States

## Solution

Sage CRM and Sage ERP

"Run by service technicians, for service technicians," is Horizon Spa and Pool Part's mantra.

The company Hydro-Quip's Vendor of the Year six times in a row, and it averages a steady 15 percent growth with almost no turnover. According to Becky Moore, controller, Horizon's success is due in large part to Sage CRM.

Since 1995, Horizon has relied on Sage CRM as its financial software. It uses Sage Accpac CRM to automate customer reminders and manage merchandise returns. Recently, it adopted Sage 300 ERP for computerized warehouse management.

## Warehouse waves

"We use Sage Software to run almost everything around here. We have six people who enter upwards of 500 orders a day into the Sage CRM Order Entry module. Often orders change throughout the day, and Sage CRM gives us the flexibility to make alterations until it's time to send the order through," says Moore.

"The Order Entry module interfaces directly with our Sage ERP, which is customized to perform web dispatches," she continues. "The system also allows us to send orders to the warehouse in waves. This creates a steady flow of work, rather than slamming the warehouse with hundreds of orders at the end of the day. The software is saving us from hiring three additional people in the warehouse alone."

'We offer technical support on all the boards we sell, plus repairs on parts, and use Sage CRM to automate the workflow.'

Becky Moore,  
Controller,  
Horizon Spa & Pool Parts, Inc

## Challenge

Horizon Spa & Pool Parts needed to automate processing of 500 orders per day, including order entry, financials, warehouse management, and returns.

## Solution

The company chose Sage CRM because of its complete suite of financial modules and integrated warehouse management software.

## Results

Without Sage Software, Horizon would have to hire two people in shipping, three in the warehouse, and could only do 1/7 of its current business volume.

### Practical picking

Sage CRM provides pick tickets, sorted by the most efficient method for retrieval. Warehouse workers use a scanner to pull four or five orders at a given time, and deliver them to a check station for sorting by individual customer order. The software ensures that orders are accurate, then drops inventory from the warehouse system and delivers it to shipping, complete with a ship ticket and label. A third-party module that integrates with Sage ERP calculates freight charges for speedy pick-up by Federal Express.

With more than 17,000 line items in inventory, keeping track of status could be a nightmare. Sage CRM and Sage ERP give Horizon real-time inventory, so the company knows exactly what items are in stock, and where to find each and every one of them. “We’d have to hire at least two more shipping clerks if we didn’t have Sage CRM,” explains Moore.

### Customized accounting

In the finance department, Horizon uses Sage CRM to manage payables, receivables, payroll and the general ledger, and to write a multitude of financial reports. “Sage CRM lets us incorporate checks and balances, such as special filters to hold orders for customers with payment issues,” says Moore. “The controls let us know when a credit card has expired, for instance, so we can take appropriate action.”

Similar comments appear in the Sage CRM Order Entry module. “We created fields for notes, for things like customers turned over to collections,” Moore adds. “Our reseller has been wonderful, working with us to set up customizations wherever we’ve needed them.”

### Plastic, not paper

Sage CRM has automated credit card processing as well. “It works great,” says Moore. “We no longer have to manually post payments or create a paper trail for credit card transactions. Now we report all charges for the day, charge credit cards the next day, and post instantly. This has cut the time we previously spent on credit card accounts in half.”

Moore appreciates the flexibility built into credit card processing, too. “We were able to select our own merchant services provider, instead of being forced into using the one a software vendor recommends,” she says.

Horizon’s timecard package interfaces seamlessly with Sage CRM, eliminating even more paperwork. After a supervisor approves timesheet data, information flows directly to Sage CRM for automated payroll processing.

### Must-have software

Horizon found a novel use for Sage 300 ERP and Sage CRM—contacting customers who haven’t ordered in a long time. It also takes advantage of Sage 300 ERP and Sage CRM for merchandise returns. “We offer technical support on all the boards we sell, plus repairs on parts, and use Sage CRM to automate the workflow,” notes Moore. “We like having returns in a separate part of the system, rather than in open orders, where we can manage them as a distinct workflow.”

Moore says that this business system is indispensable. “Sage CRM is a critical part of our company. If we didn’t have it, we’d be dead meat—and couldn’t even do \$1 million a year, rather than the \$7 million we do today.”

## About Sage CRM

Over 15,000 small and medium sized companies across the globe use Sage CRM every day to accelerate sales, drive business productivity and make every customer interaction count. It is used by enterprising, growing companies seeking new ways to interact with customers, leverage the power of social media and take advantage of the latest mobile developments to further grow their business. When combined with Sage ERP, our customers enjoy better business insight, increased efficiencies and productivity, and gain a single, customer-centric view across their entire business. So whether you're just starting out or have already grown to several hundred employees, Sage CRM can help accelerate your business success.

Accelerate your business success with a free 30-day trial at [www.sagecrm.com](http://www.sagecrm.com)

