

Global Orthopedic Supplier Achieves Double Sales and Maximizes Trade Show and Online Efficiencies

AccountMate logic for automatically generated web and tradeshow orders relieved 100% employee manual entry

Petaluma, CA ([PRWEB](#)) August 21, 2015 -- Using industry-specific program solutions for sales functions and AccountMate financial software as its business backbone, OPTP (Orthopedic Physical Therapy Products) has a comprehensive front-to-back office solution. “AccountMate and AMmobile helped us solve many of our sales and logistics issues. Due to the efficiency and effectiveness of the system, we have doubled sales in the past 20 years while maintaining the same number of accounting and customer service employees,” said Richard Carlson, OPTP Accounting/IT Manager.

For over 35 years, as the demand for orthopedic, physical therapy, rehabilitation and fitness solutions increased, OPTP experienced consistent growth, distributing their products directly to customers, distributors and wholesalers globally. Keeping pace with growing sales became increasingly challenging, specifically with processing online web and off-site customer orders. As a result, OPTP found the need to address several business challenges that significantly impacted their internal operations.

The first step in OPTP’s technological advancement involved enhancing web orders. Keeping pace with higher volume sales and logistics became increasingly challenging with orders obtained from the company website ([www.optp.com](#)), which comprise 25% - 30% of the corporate revenues. Previously, orders submitted online were received in the sales department via e-mail notification. All of the pertinent data needed to be re-keyed and entered into AccountMate by sales support personnel. While this internal step was seamless to customers, the process was inefficient, time consuming and prone to errors.

OPTP required an overhaul of the placement, tracking and management of web orders. By customizing their AccountMate system, OPTP could leverage their original investment with a modifiable solution that provided superior scalability for their growing business. To handle these transactions, their AccountMate Solution Provider, iSOFT, built a highly customized system within AccountMate logic to ensure that orders were submitted directly into AccountMate, bypassing the customer service department 100%. As a result, the necessary internal processing required to place, track and follow-up on web orders was automatically generated. Customer service representatives (CSR’s) were no longer required to re-enter web orders. This change has enabled OPTP to effectively manage web orders with minimum effort and dramatically increase efficiency.

“This system enhancement eliminated the need to manually enter 25% -30% of company orders,” said Carlson. “The website interacts with AccountMate almost like a CSR, entering the information directly into the Sales Order system.”

The next step in their technology update involved increasing efficiency with off-site orders. OPTP attends approximately 24 trade shows per year that last anywhere from two-to-four days in duration. OPTP required real-time information, automation and logistics at trade shows.

Without up-to-the-minute data, the outside sales team was hampered by a manual order processing system that required orders to be re-entered and payments processed “back at the office” when the trade show concluded. This process was time consuming and frequently prone to errors and payment delays when numbers or letters

where transposed.

OPTP leveraged AccountMate's program design to add on industry-specific solutions to solve their sales support and distribution challenges seamlessly. AMmobile is a mobile solution for AccountMate that allows clients to take their AccountMate system on the road via iPad. With AMmobile, OPTP authorized personnel can upload an attendee list prior to the event so contact information is already available in the system. With this mobile solution, the sales team can submit, ship and sync orders directly into AccountMate instantaneously. This automated process allows orders to be purchased and paid for via credit card swipe in just a few seconds directly at the trade show and without having to re-key orders, enabling faster order taking and improving customer satisfaction.

“Before we used AMmobile, about 15-20 people may be lined up to purchase products at some trade shows,” states Carlson. “If the lines are too long, people may not have time to wait, and they'd leave our booth, which resulted in lost sales. The faster we can process orders, the more people we can sell to.”

In addition, OPTP and iSOFT developed a modification which allows the shipment information to be automatically sent to both the UPS and FedEx systems and then back to AccountMate. The shipping department simply scans a barcode on the invoice and all of the shipping details populate into the appropriate fields, allowing for an extremely efficient shipping process.

Another technological update involved creating custom reports to monitor company data. One such report was a customized invoice summary report by customer class which allows OPTP personnel to view sales details by customer type, such as medical doctor or physical therapist and gain valuable sales information on who is buying their products. The customized web report provides key sales data that allows OPTP personnel to “monitor web sales with a push of a button,” according to Carlson.

Equipped with AccountMate and third party systems, OPTP personnel now has invaluable business tools to help ensure the continuum between planning, sales and distribution for years to come.

About AccountMate

Founded in 1984, AccountMate develops and markets fully modifiable business accounting software. Systems range from single user versions to those that support over hundreds of users simultaneously. [AccountMate software](#) is available for local or cloud installation. It is distributed exclusively through a worldwide channel of authorized solution providers. AccountMate can be reached at (800) 877-8896 or at accountmate.com.



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