

Mastering Efficiency in NetSuite:

A Guide for IT Resellers in a Fast-Paced Marketplace



Purchasing
Assistant



Purchase
Planner

 **Interact**



Sales Margin
Tracker



House
Margin

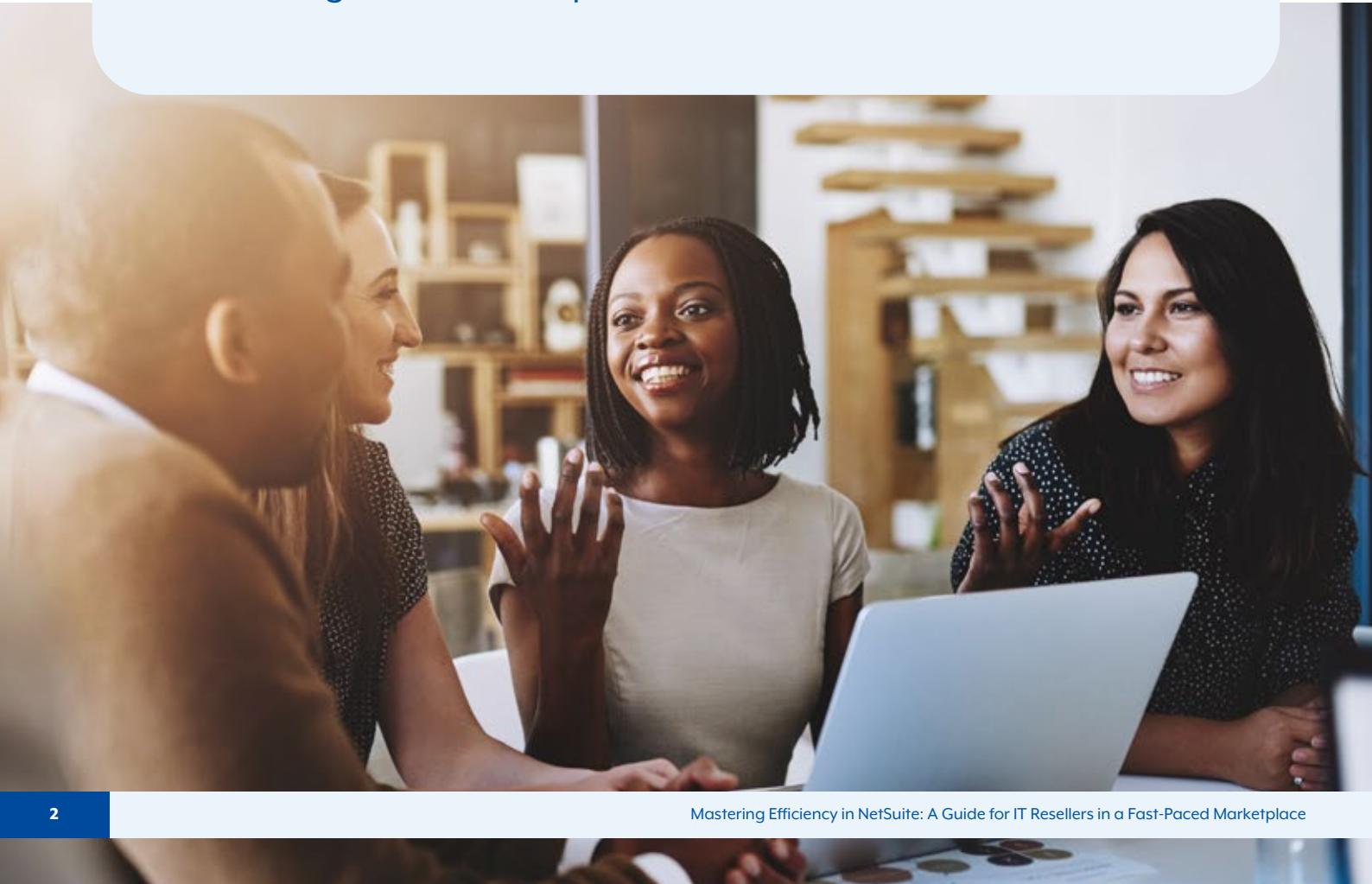


Nolan
Business Solutions

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Staying Competitive in an Ever-Changing Market

In today's rapidly evolving technological landscape, the role of IT resellers are the unsung heroes linking suppliers, distributors, and end-users. However, they face a fiercely competitive market, with a range of challenges, from the accelerated speed of technological advancements that demand constant adaptation to the intense competition that puts pressure on profit margins. Supply chain disruptions and complex sales cycles all add to this, while managing relationships with vendors and embracing digital transformation becomes paramount. To thrive, IT resellers must skillfully navigate this intricate web, offering value, innovation, and top-notch customer experiences.

A well-orchestrated, automated process between IT resellers and their supplier and distributors is paramount for staying competitive and meeting the ever-growing demands of customers. Establishing seamless communication between back-end systems and supply chain is the golden ticket that can propel an IT reseller's business forward.



Benefits of Improving Automation for IT Resellers

-  **Improved Customer Experience:** With a streamlined and automated process, orders move like lightning from customer to reseller to distributor, ensuring a quicker delivery. Hassle-free transactions and automated email updates make customers happy, and happy customers are repeat customers!
-  **Reduced Costs:** Efficiency isn't just about speed; it's about saving money too. Automating your process cuts down on wastage, errors, and unnecessary delays, which means less money spent on fixing mistakes and more money in your pocket.
-  **Stronger Partnerships:** When your processes run smoothly, suppliers and distributors love working with you. They appreciate your reliability and efficiency, making them more inclined to offer you better deals and priority access to new products.
-  **Better Resource Management:** Automated processes help you allocate your resources more effectively. It helps you manage your inventory, reduce overstock or shortages, and optimizes your workforce so they can spend time on more important tasks.
-  **Real-time Decision Making:** Having automated processes and access to real-time data ensures that your team can make better decisions with live pricing and stock availability.

Boost Efficiency and Cut Costs with eInteract SuiteApp

Used by the UK's #1 IT Reseller, eInteract frees sales teams from transactional tasks and empowers them to focus on their core responsibility of selling and greatly increases the number of accounts a salesperson can manage.

For businesses leveraging NetSuite as their ERP solution, the eInteract SuiteApp by Nolan Business Solutions is a game-changing addition. This comprehensive suite seamlessly integrates various facets of the IT VAR supply chain, empowering IT Resellers to streamline the entire sales order lifecycle, from quoting to order conversion and customer service while ensuring accuracy and efficiency.

The solution evaluates incoming sales orders based on predefined criteria, such as order value, customer details, and more. By flagging orders that require special attention, eInteract saves valuable processing time and prevents potential issues.

The 6 key features

- 1 Automatic Item Feed**
- 2 Quotes and Sales Orders**
- 3 Back-to-Back Purchase Orders**
- 4 EDI (Electronic Data Interchange) Purchase Order**
- 5 EDI Delivery Advice and Fulfilment**
- 6 EDI Supplier Invoice**



Advantages:

Empower Sales Teams and Reduce Costs:

eInteract liberates sales teams from mundane transactional tasks, allowing them to concentrate on their core function of driving sales, effectively slashing the cost-per-transaction.



Integrated Business Application:

A single, robust business application harmoniously supports sales, distribution, finance, and customer service functions, achieving up to 80% reduction in processing time from quotation to delivery through real-time integration.



Real-time Connectivity and Product Data Accuracy:

Benefit from automatic product data updates, real-time pricing, and stock availability.



Effortless Purchase Orders:

Purchase orders are electronically dispatched to distributors via EDI, including the ability to attach special bid reference numbers.



Automated Order Fulfilment: Receive and process order confirmations and delivery advice from distributors, triggering automatic purchase order and sales order fulfilment in NetSuite.



Serial Number Compatibility:

Seamlessly manage serial numbers, utilizing standard NetSuite serial items or custom fields for storage.



Efficient Invoicing and Optimized Cashflow:

Streamline disti and customer invoice processing, automate inventory item feeds, and save huge amounts of time by automating the processing of supplier invoices.



Enhanced Customer Service:

Automatically notify customers when distributor shipping notices are received, enhancing customer satisfaction.



Purchasing Assistant: Optimizing Procurement



The Purchasing Assistant functionality increases procurement efficiency by conducting an intelligent evaluation of approved sales orders to see if the order can be processed automatically. This is achieved through a set of rules set in the configuration, including order value, customers and items.

Eligibility Check:

- Determine if the order qualifies for Purchasing Assistant at line level.

Real-time Enquiry:

- Conduct real-time price and availability enquiries from all item suppliers.

Supplier Selection:

- The system intelligently selects the best distributor based on price and availability, and optimizes purchase costs considering factors like delivery costs.

Automated Purchase Orders:

- Generate purchase orders automatically inside NetSuite and link them to the relevant sales orders.

Dispatch Method:

- Send Purchase Orders via EDI feed directly to supplier, if available.
- Email Purchase Orders to supplier if EDI link is not accessible.

Furthermore, sales order lines not meeting Purchasing Assistant criteria or lacking an ideal distributor are conveniently accessible to the purchasing department via Purchase Planner.

Purchase Planner: Enhancing Purchasing Efficiency



Within eInteract, the Purchase Planner functionality seamlessly simplifies complex order management for Purchasing teams, fostering enhanced efficiency and productive supplier dialogues. Utilizing filters based on suppliers, product groups, customers, locations and real-time price and availability features, the Purchasing department is also able to gain greater control over sales order lines.

eInteract empowers EDI Suppliers with a range of capabilities:

- **Acknowledgment of orders** triggers automated purchase order updates.
- **Supplier updates**, including pricing and ETA, harmonize seamlessly with ongoing purchase order processing.
- **Dispatch advice** from suppliers drive purchase order and sales order fulfilment updates, positioning Sales Orders for "Pending Invoicing" status.
- **Effortless EDI invoice reconciliation** aligns incoming invoices with NetSuite purchase orders.

This holistic Sales Order Lifecycle approach ensures fluid transitions, from being entered onto NetSuite to sales order fulfilment and customer invoicing.

For resellers of fast-margin, low-value items, eInteract streamlines stock management. Regular uploads from disti feeds normalize product data via Manufacture Part Number, creating a unified NetSuite record for each item with supplier details, pricing, and quantities. Automated feeds and real-time data empower purchasing assistants, purchase planners, and sales teams for optimal sourcing decisions.



Sales Margin Tracker: Elevating Profit Insights



The Sales Margin Tracker (SMT) enables NetSuite customers to view a detailed analysis of the actual margin achieved on a sales order by providing real-time data on sales transaction header and line level profitability.

SMT simplifies intricate margin calculations by:

- Sourcing costs from diverse documents for individual sales order lines.
- Dealing with various delivery costs for separate purchase orders linked to each line.
- Streamlining multiple sales order lines within a single purchase order and delivery cost.
- Handling fluctuating delivery rates based on carriers.
- Tackling supplier challenges and revisions.
- Managing supplier returns, credits, and re-invoicing complexities.



House Margin: Enhancing Margin Visibility and Accurate Profit Analysis



House margin provides IT resellers with a way to increase the cost of an item based upon flexible rules. The rules are based on attributes like manufacturer, supplier or item category.

The increase is presented in the Price & Availability screen to the sales team to help guide their decision-making when setting selling prices and selecting which disti to potentially buy from. This gives management the ability to influence actions in line with wider company goals.

Some companies accumulate this additional revenue and use it to cover the costs of staff-related benefits such as staff parties or lunches out. Others will simply retain it. Essentially, it is up to the company how they wish to make use of this.

House Margin also enables decision-makers to place impetus on selling one line of products over another. By adding a House Margin, IT Resellers can incentivize sales teams to shift their focus to selling whatever is best for the business at that time.





Softcat and Nolan: Unleashing Growth Through Value-Aligned Partnership



Greater automation
and a system that
supports growth



Significantly
reduced cost-
per-transaction



60% of hardware
transactions
purchased without
human intervention



Seamless year-end
without needing
additional support

“In projects like these, you need a partner you can trust, a partner with deep industry knowledge who are prepared to go the extra mile, which we certainly found in Nolan”

Rob Parkinson – Chief Information Officer, Softcat

The Customer

Softcat are the number 1 IT Reseller in the UK with customers ranging from small and medium businesses to large corporations and public sector organizations.

With headquarters in Marlow, they now have offices all over the UK with additional international satellite offices. Big on culture and community, Softcat are ferociously people- and customer-led, abiding by their values of Fun, Intelligence, Community, Responsibility and Passion.

Relationships are at the very core of Softcat’s growth, and their employees and customers are at the heart of everything they do.

The Challenge

Over the last few years, Softcat experienced phenomenal quarter-on-quarter growth, to the extent that their back office couldn’t keep up. Having used the same core system for more than twenty years, with more and more functionality added along the way, Softcat had a ‘hairball’ of different programs which limited them in efficiently scaling with the growth of the company.

Softcat required moving to a new sustainable system that was supported and could integrate with other contemporary systems and wasn’t so heavily customized using outdated technology with inconsistent data tables.

The new system would need to be able to scale up, automate more processes, and have the flexibility to add functionality as and when needed.

The Solution

Following a rigorous RFP process, NetSuite stood out to Softcat with its ease of use, ability to configure to their needs and, and flexibility to add new functionality. NetSuite's OneWorld solution would provide Softcat with financial and operational visibility both domestically and internationally.

However, with other strong offerings in considerations, for Softcat it came down to finding a partner that they could work well with, one that aligned with their values, who knew how they operate, and what success means to them.

Nolan first started working with Softcat in 1998 and had built a strong relationship. They also had a strong track record with IT solution providers and expertise in ERP customisation and development. Yet above all, it was the value aligned partnership that gave Softcat the confidence that Nolan could deliver a personalised ERP system that really worked for them.

The outcome

The implementation was a huge success for Softcat and delivered many benefits to the company associated with increased performance, greater automation and a system that will support growth.

Combining NetSuite's strengths in providing pertinent information, through features such as related records and a powerful global search, with Nolan's eInteract SuiteApp, means that Softcat spend less time working with the system and more time interacting with their customers and suppliers.

The project has brought immediate benefit in supporting their multinational growth aspirations, making expansion overseas scalable, while still providing a consolidated view of their business.

Year-end would often mean Softcat needing additional support with their legacy system, this year it came and went seamlessly- the system was stable and they had no issues.

Softcat's growth continues at pace. Being able to support this growth with systems that would scale appropriately was a big part of what the NetSuite implementation was about.

"We had outgrown our existing software and needed a more flexible scalable solution that would future-proof our business for years to come"

Howard Holland - Group Financial Controller, Softcat

ORACLE
NETSUITE + eInteract

"Through the combination of NetSuite and Nolan's eInteract SuiteApp, we've been able to reduce our cost-per-transaction. Up to 60% of all hardware transactions we process are now purchased automatically by our system without any human intervention."

Howard Holland - Group Financial Controller, Softcat



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