



Above: James "Doc" King — marketing communications mgr.

Right: Penny Rosen and store manager Luis Bourdon

Retail Store: American Soil & Stone

Location: San Rafael

Challenge: Track inventory

for timely ordering

**"Now we know it's time to reorder, before we run out."** — Penny Rosen, accounting mgr.

## POS Makes a Rocky Inventory Smooth

Every time American Soil & Stone's (AS&S) San Rafael store ran out of flagstone or soil amendment, owner Alfonso Garcia lost a sale.

So it was with some urgency that he and Accounting Manager Penny Rosen began looking into point of sale (POS) inventory management systems. They checked out a couple of options and ruled them out, realizing it made sense to link a POS with the company's QuickBooks accounting software.

When all roads led to a QuickBooks POS, Penny and Alfonso went to the QuickBooks website to learn about the system and check out local POS-certified consultants. Although they spoke to a couple of the listed companies, Marin-based Business Cents owner David Glantz was the only one they met with. "We liked him immediately," says Penny. "There were good vibes."

David brought the POS system to the American Soil office and demonstrated how it would streamline the way they did business, and alert them when it was time to reorder. Alfonso and Penny liked what they saw.

### The client

American Soil & Stone, a landscaping materials supplier at 565A Jacoby Street in San Rafael

### The challenge

Integrate industrial inventory management with QuickBooks accounting. Must identify reorder point to avoid lost sales.

### The solution

QuickBooks Point of Sale Pro integrated with existing QuickBooks Premier Retail accounting

- POS workstations and administrative server
- Bar code scanners and printers
- QuickBooks Merchant Services with integrated credit/ATM card swipes
- Business Cents consulting, system installation and training

### The result

- Automatic, accurate inventory tracking
- Higher sales because material outages are prevented
- Save one to two full days of administrative time every month because of integration with accounting software

### Getting set up

AS&S hired their computer support vendor to put together a network of four sales stations and an accounting station for Penny. Meanwhile, Business Cents purchased the QuickBooks software and POS hardware, including the bar code scanners and POS printers, and took them to the computer vendor's office. David installed the POS components and incorporated a long-overdue upgrade to QuickBooks Premier Retail accounting software.

"I thought I could set it up myself, because I've installed software before," says Penny. But Alfonso thought it was better to have David do it. "He was right. David knew things I wouldn't have known to do," Penny agrees.



From creating the merchandise accounts and setting up the customer database to customizing the system to enhance AS&S operations, it saved time to get it right the first time.

Once the system was in place, David trained the staff by walking them through business scenarios, such as how to ring up a customer who wants 500 pounds of a custom soil blend and three Tuscan pots, delivered. Then, to make the transition smooth, he spent the day the system went live in the store with the AS&S sales staff.

The sales team took to the system easily. James "Doc" King, a self-professed non-computer person, says, "It's very intuitive. The screens lead you through the process. Click an icon and it gives you choices."

## Translating tons to pounds

The system customization involved an unusual element – setting up calculations necessary to receive materials by the ton, then sell them by the cubic yard or by the pound. "The system couldn't do that and David made it happen," Penny says.

And it was working like a charm, until a routine software maintenance patch arrived from QuickBooks that accidentally undid all the conversion calculations. Suddenly, the AS&S books showed they were paying more to purchase the products than they were charging customers.

David sent the data to QuickBooks, and with his background in IT, was able to work closely with the corporation's tech staff to unravel the kink. "To minimize the disruption, I restored the data to American Soil's system in the middle of the night," says David.

## An industrial retailer

Because American Soil is not a typical storefront retailer, "We had a couple of oddball problems David hadn't seen before," Penny says. "But he knew the system inside and out and he made it easier for us."

For example, unlike most stores that process only cash and credit sales, many AS&S transactions are recorded on account and invoiced later. They also keep track of job costing for landscapers and contractors who are reselling the materials. Another less common requirement is a mechanism to calculate and charge for deliveries. Business Cents made sure these options were in place.

## The big difference

Now, Alfonso and his sales team always know what materials are on hand and are alerted when it's time to place a reorder. His staff easily generates purchase orders on the system and can speed the process by emailing them directly to suppliers.

On the accounting side of the business, and most important to Penny, every time a customer makes a purchase the resulting invoice automatically becomes part of her financial data. That's a radical change from the pre-POS days when she had to input a big pile of complex invoices by hand at the end of every month.

"The integrated system saves me a full day or two every month," Penny says. "It has helped me immensely. And I would highly recommend Business Cents."