

Horizon Spa & Pool Parts Makes Big Splash With Sage Pro ERP

“Run by service technicians, for service technicians.”

The formula is clearly working for Horizon Spa & Pool Parts in Tucson, as it has won Hydro-Quip’s Distributor of the Year six times in a row, and 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.

Since 1995, Horizon has relied on Sage Pro ERP as its financial software, regularly updating as new versions and capabilities became available. It also uses SageCRM to automate customer reminders and manage merchandise returns.

Warehouse Waves

“We use Sage to run almost everything around here. We have six people who enter upwards of 500 orders a day into the Sage Pro Order Entry module. Often orders change throughout the day, and Sage Pro 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 integrated warehouse management system, 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.”

Practical Picking

The Sage system 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 orders are accurate, then drops inventory from the warehouse system and delivers it to shipping, complete with a ship ticket and label.

Customer

Horizon Spa & Pool Parts, Inc.

Industry

Wholesale Trade—Swimming Pools and Equipment Merchant Wholesalers

Location

Tucson, Arizona

Number of Locations

One

Number of Employees

35

System

Sage Pro ERP

Accounts Payable

Accounts Receivable

ProAlert

Customization Manager

General Ledger

Inventory Control

Order Entry

Payroll

Purchase Order

Challenge

Automate processing of 500 orders per day, including order entry, financials, warehouse management, and returns.

Solution

Sage Pro with the complete suite of financial modules, plus integrated warehouse management software, and SageCRM to manage return authorization workflow.

Results

Thanks to Sage, Horizon is able to achieve success without hiring the five additional people that would be needed to accomplish only 1/7 of its current business volume.

With more than 17,000 line items in inventory, keeping track of status could be a nightmare. Fortunately, Sage Pro technology has given 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,” explains Moore.

Customized Accounting

In the finance department, Horizon uses Sage Pro software to manage payables, receivables, payroll, and the general ledger, and to write a multitude of financial reports. “Sage Pro 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 Pro Order Entry module. “We created fields for notes, for things like customers turned over to collections,” Moore adds. “Our Sage business partner has been wonderful, working with us to set up customizations where we’ve needed them.”

Plastic, Not Paper

Sage Pro software 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.

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

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

Must-Have Software

Horizon found a novel use for SageCRM—contacting customers who haven’t ordered in a long time. It also takes advantage of SageCRM for merchandise returns. “We offer technical support on all the boards we sell, plus repairs on parts, and use SageCRM 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 their business system is indispensable. “Sage Pro is a critical part of our company. If we didn’t have it, we’d be dead meat—and couldn’t even do a fraction of the business we do today.”

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