

CASE STUDY

An efficient transition to a new inventory management system

A manufacturing and distribution business required a cost-effective system to manage sales orders, stock purchases, and inventory – as well as integrating with Xero. Empower Business converted data from a legacy system, and provided training and support on the new system.

“It was good to have someone with cross-knowledge of different business areas, such as accounting. The communication throughout the project was extremely good, with Trevor always replying promptly, and he provided helpful troubleshooting support. He was flexible and open to suggestions, and also showed us some helpful shortcuts. I’d definitely recommend Empower Business.”

BACKGROUND



Paneltec supplies high quality, decorative laminated panels for building facades and interiors to installers throughout New Zealand. The panels are manufactured at Paneltec’s factories overseas, and are warehoused at the company headquarters in Dargaville, Northland, for cladding on commercial buildings and high-end homes and apartments.

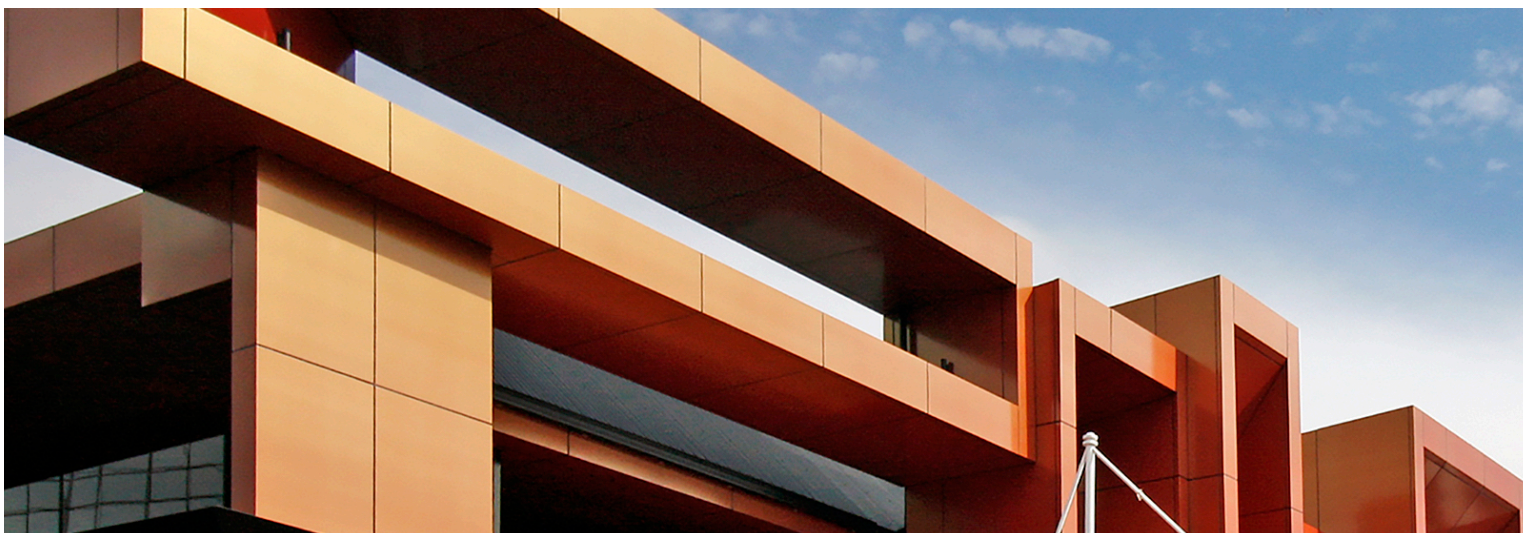
THE PROBLEM

Paneltec was made a separate entity from its parent company at the beginning of the tax year. This provided Paneltec with the opportunity to install a new system to manage its sales orders, stock purchases, and inventory. To date, Paneltec had been using the parent company’s system, but found it to be complicated, lacking in reporting functionality, and not user friendly.

Company Director, Judah Simpkin, was keen to use the change in business structure as an opportunity to move away from the legacy system, to software that better suited its needs.

Paneltec also needed a solution that would be cost-effective for a small business consisting of a team of three people. Additionally, the software needed to interface with Xero, and support multiple currencies as Paneltec imports its products from its overseas factories. Accurate inventory management, reordering, cost management, and pricing were key areas that the software solution needed to address.

JUDAH SIMPKIN – DIRECTOR
www.paneltec.co.nz



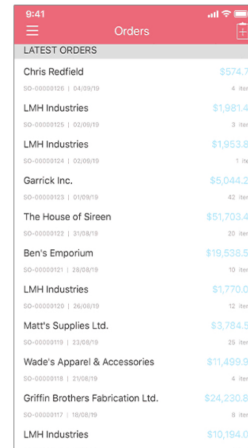
THE SOLUTION

Judah Simpkin researched available software options, and identified that Unleashed provided the functionality that was needed, and at a cost-effective price.

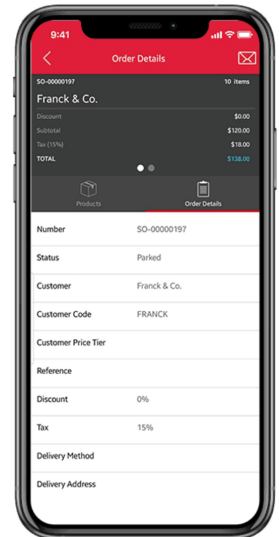
To make the transition to the new software, Judah Simpkin required an Unleashed Implementation Partner to manage and implement the new system. Empower Business & Accounting Solutions was selected, due to a recommendation from a local business, as being competent, easy to work with, and with good communication.

The work completed by Empower Business involved the following tasks, completed at a fixed price:

- Data on customers, suppliers and products was converted from the existing system to Unleashed.
- Customised form layouts and other set up tasks were completed.
- Two full-day sessions onsite at the Paneltec office in Dargaville for additional setup plus training.
- Post-installation support provided via Zoom, to resolve any issues, as well as training Paneltec's bookkeeper on the integration between Unleashed and Xero.



LATEST ORDERS	
Chris Redfield	\$574.77
LMH Industries	\$1,981.46
Garrick Inc.	\$5,044.28
The House of Sireen	\$51,703.42
Ben's Emporium	\$19,536.50
LMH Industries	\$1,770.00
Matt's Supplies Ltd.	\$3,784.57
Wade's Apparel & Accessories	\$11,499.96
Griffin Brothers Fabrication Ltd.	\$24,230.84
LMH Industries	\$10,184.00



Order Details	
Discount	\$0.00
Subtotal	\$120.00
Tax (15%)	\$18.00
TOTAL	\$138.00
Number	SO-0000197
Status	Parked
Customer	Franck & Co.
Customer Code	FRANCK
Customer Price Tier	
Reference	
Discount	0%
Tax	15%
Delivery Method	
Delivery Address	

The Unleashed mobile app provides critical information on the go.

OUTCOMES

Paneltec has a cost-effective inventory management system that suits its needs. The software was implemented efficiently and with good communication and support from Empower Business.

Paneltec is now able to undertake:

- Accurate purchasing and product costing.
- Accurate and complete stock valuation, including batch control.
- Full sales management, from quote, to order, to dispatch and invoice.
- Accurate accounting and financial reports in Xero.

WHAT IS UNLEASHED?

Unleashed software is designed for manufacturers, wholesalers, and distributors, to provide clarity across suppliers, production, inventory and customers. Unleashed provides real-time data and reporting, including a mobile sales app. It helps with critical data, such as:

- Accurately recording and allocating costs at each stage of the production process, improving forecasting ability.
- Identifying choke points in wholesale, distribution and retail channels due to surplus inventory.
- Optimising cash flow to ensure losses as a result of lost sales are avoided altogether.
- Analysing stock across multiple warehouses, in multiple locations, anywhere in the world.

Contact us for more information:

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