AccountMate®

Client

Orthopedic Physical Therapy Products (OPTP)
optp.com

Type of Business:
Supplier of orthopedic, physical therapy, rehabilitation, fitness products and educational materials

Number of Locations: 1

Number of Employees: 25

AccountMate Users on System: 15

AccountMate Modules:
▪ Accounts Payable
▪ Accounts Receivable
▪ General Ledger
▪ Inventory Control
▪ Manufacturer's Inventory
▪ Purchase Order
▪ Sales Order

3rd Party Application
AMmobile

"Over the past 20 years, OPTP's sales have doubled, but accounting and customer service staff levels have remained unchanged in large part because of the efficiency and effectiveness of the AccountMate accounting system."

– Richard Carlson, Accounting and IT Manager, OPTP

Global Orthopedic Supplier Double Sales and Maximizes Online Efficiencies

Located in Minneapolis, Minnesota, OPTP (Orthopedic Physical Therapy Products) is a recognized leader in providing individual consumers, healthcare and fitness professionals with orthopedic, physical therapy, rehabilitation and fitness products and educational materials. OPTP believes that trends toward self-care, coupled with efforts to contain healthcare costs, are shaping tremendous opportunities for those who deliver conservative care.

For over 35 years, OPTP has selected high-quality physical therapy and wellness products. While initially serving clients in the United States, OPTP expanded operations and currently distributes their products directly to customers, distributors and wholesalers globally. Today, as the company continues to grow and expand its operations world-wide, OPTP remains committed to producing quality, innovative health and wellness solutions.

Since 1979, as the demand for orthopedic, physical therapy, rehabilitation and fitness solutions increased, OPTP experienced consistent growth. 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.

While OPTP was satisfied with their core AccountMate SQL system, AccountMate Business Partner, iSOFT Systems, LLC, recommended that the company implement additional solutions that supported their growth objectives. As Richard Carlson, OPTP Accounting/IT Manager explained, "So far we've been pleased with our AccountMate SQL system – it's a very stable and reliable financial management solution that enables our company to run from start to finish."

The Challenge

Keeping pace with increased 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 error-prone.

The Solution

Enhancing Web Orders
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, 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."

Third Party Solutions Increase Efficiency
OPTP attends approximately 24 trade shows per year that last anywhere from two-to-four days in duration. While OPTP was satisfied with the core accounting processes of their AccountMate management system, it did not provide essential real-time information, automation and logistics

![AccountMate logo]

that they desired 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. As a result, handling this manual process became progressively more problematic as orders from trade shows increased over the years.

OPTP leveraged AccountMate's award-winning program design to add on industry-specific programs 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.

Reports for Monitoring Data
AccountMate SQL has over 100 standard reports in each module, providing a real-time snapshot to current and historical customer information, sales data and inventory details. OPTP required additional reporting that fell outside the scope of AccountMate's standard reports. To comply with internal requirements, iSOFT created customized reports so OPTP can quickly obtain necessary documentation and reporting in real-time. For example, by

having a customized invoice summary report by customer class 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. Using AccountMate to monitor sales and production data equips company personnel with invaluable business insights to help ensure the continuum between planning, sales and distribution.

The Result

Using industry-specific program solutions for sales functions and AccountMate financial software as its business backbone, OPTP has a comprehensive front-to-back office solution.

According to Carlson, "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 – and we are very satisfied with business operations."

About Third Party Application

AMmobile is a mobile solution for AccountMate that allows clients to take their AccountMate system on the road. AMmobile can be reached at **ammobile.net.**

About iSOFT Systems, LLC

iSOFT Systems specializes in ERP/accounting systems for small to mid-size companies and has been ensuring successful AccountMate installations and satisfied customers since 1990. With over 25 years of experience, iSOFT received the President's Award in 2010 and Innovative Innovation Award in 2013. iSOFT can be reached at **isoftsystems.com**.

About AccountMate

Founded in 1984, AccountMate develops and markets fully customizable business management software designed to meet the growing needs of small to medium-sized businesses. Systems range from single user versions to those that support over hundreds of users simultaneously. AccountMate software is available for local installations or cloud deployment. It is distributed exclusively through a worldwide channel of authorized solution providers. AccountMate can be reached at (800) 877-8896 or **www.accountmate.com**.