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CERTIFICATE MANAGEMENT: STOP MISTAKES AND SAVE TIME by Dennis Cowhey

Is Certificate Management Slowing You Down?

Maintaining and delivering proper certifications is as important as delivering the right part in many instances. Fastener distributors know that it can become a complex part to handle if an item requires certification. Each product can have varying certification requirements for each customer. When entering a purchase order, someone must specify the type of certifications that are required. If your software does not have a certificate management system integrated into your purchasing processes, things are easily and often lost later down the line when the details are crucial. Costly mistakes can be made that result in returns and can lose customers.

Knowledge In The Warehouse

While receiving inventory, someone needs to know what information is required, and they must be confident that they go with the product. Certifications are often different based on individual customer requirements. Depending on who you are selling to, an order could require any combination of documentation. Material Test Reports (MTR) are a certified record of a material's physical and chemical properties. These qualities are necessary for assuring proper compliance, reporting, and application purposes. In some instances, an MTR is enough; other times, it is not enough or can be too much.

The warehouse personnel needs to be able to identify the correct lot of the product that has the required certifications on file, and they need to be sure

that the documents go out with the product. If any step in this process is missed, there is big trouble. When orders are shipped without the required paperwork, customers reject the parts and insist that all the missing documentation be produced. Once a customer writes up your company for nonconformance, you risk losing all future sales to that customer.



Let Salespeople Sell

When a customer orders a part that usually requires certifications, the person placing the order may not specify it during the sales call. When the salesperson is taking an order, they should not have to remember to identify the customer's previously stated requirements.

When your system remembers the details, you are free to stay focused on selling and customer relationships. If you require manual steps during your sales process and in each stage of handling parts to assure that the proper certs go out, you are inviting problems. This approach is time-consuming and error-prone.

Problem Solved

The Business Edge™ Certificate Management System offers the ability to receive lot certificates from a vendor and automatically send them to the customer. In conjunction with the documentConnection™ module, all certificates are stored electronically for easy retrieval.

Automation

CERTIFICATE CATEGORIES

The Business Edge™ allows companies to create their own list of certificate types that they need to receive from vendors and provide to customers. Each certificate type has a default cost for purchase orders and a default price for sales orders.

DEFAULT CERTIFICATES FOR PURCHASING

Every product can require different types of certificates. The Business Edge™ allows you to define a unique default list of certificate requirements for each product. The defaults are used when the product is placed on a purchase order. These settings help people track which certificates should be received from vendors and offer an opportunity to override the cost when desired.

FLEXIBILITY

When entering a purchase order in The Business Edge,™ the system uses your default certificate settings for each item. During the entry of a purchase order, a person can request additional certs or remove specific default items. The override features allow for custom certification requirements for specific purchase orders.

SIMPLE RECEIVING

The Business Edge™ can prompt you to scan or drag-n-drop the different required certificates while receiving, or they can be uploaded at a later time. The system allows scanning

one document that fulfills multiple certificate types or multiple documents per lot number. The documents are scanned into the documentConnection™ and linked to the specific product, lot, and certificate types. The relationship between lots and documents is maintained after things have been shipped.

KEEPING TRACK OF REQUIRED DOCUMENTS

Product inquiry screens show you which lots have all required certificates scanned in and which ones are missing required certifications. The system warns the accounts payable personnel when entering the vendor invoice if all the certificates have not been uploaded. A variety of inquiries and reports help people track any lots that are missing their required certificates.

CUSTOMER CERTIFICATE DEFAULTS

There are two different ways of setting up default certificates for each customer. First, you can choose which certificates the customer will get for all products on all orders. Assigning a customer with a general rule for all products is helpful when they require the same certificate type for all orders. Second, The Business Edge™ also allows default certificates for a specific product for a customer. Managing settings per item enable customers to have different certificate requirements without extra work.



SALES ORDERS WITH SPECIFIC REQUIREMENTS

Each sales order will default to the customer's requirements based on the products entered. Once a product is added to an order, the requirements can be changed whenever the customer requires something different than their usual. When allocating lots, the system has the ability to not allow a lot that does not fulfill the customer's requirements. Certificates can be printed or emailed automatically with the packing list and invoice. System and customer level flags ensure you meet your customers' requirements.

What People Are Saying

"The Business Edge's™ documentConnection™ has shaved hours PER WEEK off my Certification Management duties. The ease of uploading test reports while receiving a PO, even direct from your vendors, makes for a smooth, no-brainer operation. When you have "non-connected" vendors, it's just as easy to do with a scanner - AGAIN - while still receiving your PO! It's SO EASY! We really like the professional look it sends to OUR customers—sending a clean and clear cert packet with their invoice. Our customers appreciate not having to track down an MTR because it is attached right to their invoice. All in one task! TBE claims that it is a time-saver; their certificate management features are a great example of this motto! Thank you, TBE, for saving me a lot of time and headaches!"

**Rick Fisher, Purchasing & Inside Sales
Fastco, Inc.**

"The Business Edge™ is THE software for the fastener distribution industry. Computer Insights understands the needs of our industry and delivers the software necessary to run a successful business. We moved from two different systems, one of them very powerful but antiquated and the other was brand new but bloated. TBE is the perfect middle ground, it has everything we need without the extra bloat. With ease, we can manage inventory, including document management for drawings and certs. VMI customers are consistently impressed

at the level and detail of data we can provide via TBE reporting to help them reduce inventory turns. On top of it all, the staff at Computer Insights is knowledgeable when support is needed and listens to their customers when there is a suggestion for improvement."

**Jeff Kempka, President
Global Fastener & Supply**

"Donnie, Billy and I still consider our trip to Chicago in the fall of 2007, on a Saturday to learn about The Business Edge™ (appropriately named) software and the subsequent first check write to become a partner with Computer Insights, Inc. was one of the very best business decisions we have made to date! Our deepest thanks go out to you, your Dad, Ms. Diane and your staff, a first-class company run by first-class people that produce first-class results"

**Robert Lomas
LTR Fastener & Supply**

Conclusion

SIMPLE, FOCUSED, & EFFECTIVE

The Business Edge™ is designed exclusively for fastener distributors, and the Certificate Management System is just one more example of how it is saving companies time and money. The Certificate Management System makes necessary steps easier and eliminates nonessential steps. The system automates many processes without the need for human intervention. Countless hours of tedious, boring, and unproductive work disappear. Customers continue to demand more customer service from their suppliers. The Business Edge™ helps companies do more, in less time, with fewer people.

Start Saving Time & Money

For more information about The Business Edge™ contact Dennis Cowhey, President, *Computer Insights, Inc.* 108 Third Street, Bloomingdale, IL 60108. Tel: 1-800-539-1233, email: sales@ci-inc.com or visit them online at www.ci-inc.com. 