

Easy Transition, Training and Implementation with Solid Route Accounting™

Sun & Fun Specialties is a DSD¹ distributor located in New Mexico. With seven trucks, and three people doing warehouse picking, they carry over 4000 products, including apparel, health and beauty products, automotive products, snacks and sunglasses. They have been using Solid Route Accounting™ since January, 2005 for their mobile sales and route accounting needs. In this interview, Gilbert and Anna-Marie discuss their experiences with Solid Route Accounting and Solid Innovation®.

SOLID INNOVATION: To start, tell us why you chose Solid Innovation.

ANNA-MARIE: We moved from our last software to Solid Innovation because the old software company closed down and we couldn't get support. No one could help us if for any reason our backups were lost or our program crashed. Because of that experience, we thought it was in our best interest to purchase software from a company that has been around for a long time, and Solid Innovation has been around for twenty years. Also, the staff is friendly and knows what they are talking about.

SOLID INNOVATION: What was the transition from your old software to Solid Route Accounting like?

ANNA-MARIE: It was pretty smooth. After we decided to work with Solid Innovation, Bryan Shier, the Director of Client Services, called us to discuss the training and implementation process. First, Gilbert and I set up a meeting with him to discuss how we wanted Solid Route Accounting to work in Sun & Fun. Next, we started training. We had three telephone conferences with Bryan, each a couple of hours long, discussing how to make Solid Route Accounting fit our needs. He spent time with us going through the manuals, and we took notes. I looked at Solid Route Accounting from an accounting point of view. Gilbert looked at it from the point of view of setting up the routes, and entering the inventory. Bryan was good at training. He did a very good, thorough training. We were trained on the program before we started using it.

GILBERT: I agree. Changing to Solid Route Accounting from our old software was easy. It was easier than I expected. Every question we had, Bryan had an answer for us on time. He also transferred customer data over from our old software to Solid Route Accounting for us. After that, I trained our sales staff on the handhelds. It was pretty easy to train them. The sales staff were up and running right away on the software.

SOLID INNOVATION: How long did the entire transition take you?

ANNA-MARIE: We did it in three to four weeks. And, like I said, it went pretty smooth.

SOLID INNOVATION: How did you add your inventory into Solid Route Accounting?

ANNA-MARIE: We scanned the barcode on the product with the handheld and we made sure the inventory levels showed the right amounts. We did it, I think, in a matter of one or two days.

SOLID INNOVATION: How has Solid Route Accounting helped you with inventory control?

GILBERT: Well, it gives me more control around inventory tracking. It lets me see exactly what inventory is where, how it's being transferred. With Solid Route Accounting, all the transfers of damages and returns are done automatically. So we know it's accurate. Also, our drivers don't have to handle transfers any more, which gives them more time to focus on selling.

ANNA-MARIE: There's more control of inventory movement with Solid Route

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¹DSD – direct store distribution

Accounting than in the other software we used. That helps us a lot. It is a great time saver.

SOLID INNOVATION: Tell us about the reporting features available in Solid Route Accounting.

ANNA-MARIE: I like the reporting features in Solid Route Accounting. I run a lot of reports on bill transactions and bill analysis. With them, I can see all the transactions created in a certain time period, or a specific transaction by bill number. I check them against my daily reports to see that all the transactions that were supposed to be received were received. I also like to generate customer history reports. With it, I can see which ROA paid for which transaction.

SOLID INNOVATION: If you were to talk to your peers in the industry about the software, Solid Route Accounting, what would you tell them?

GILBERT: I'd let them know that it's a good program, it's pretty simple and easy to use, very user friendly, no issues as far as software problems go. Probably the best

thing about it is that it is user-friendly. I would suggest that if they are looking for route accounting software, to talk to Solid Innovation. I'd recommend it.

SOLID INNOVATION: What would you tell your peers in the industry about Solid Innovation?

GILBERT: It's a good company. The people that work at Solid Innovation are very friendly and very helpful. The Solid Innovation Client Services Team answers any questions that I bring up. The company is, from my stand point, very good.

ANNA-MARIE: I agree with Gilbert. The Solid Innovation Client Services Team is very, very helpful. They answer our questions or problems as quickly as they can. They make time for helping us, even though they work with hundreds of other companies. I've even called Bryan on the spur of the moment, and he'll help me. Kudos to Bryan. He's very helpful when we need him.

“The CEO and Senior Product Specialist, Craig Fisher, and the whole Solid Innovation team are the best I have dealt with. They are a very ethical and caring company. I would recommend Solid Innovation to anybody looking for a route accounting company or program.”

*Randy Lancaster
Partner
Sun & Fun Specialties*



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