



## Becoming More Automated: Whitaker Brothers Business Machines, Inc.

# WHITAKER



### ABOUT WHITAKER

Headquartered just outside of Washington, DC, Whitaker equipment can be found in 115 countries and on every single continent in the world. Whether it's in a major military installation or a small office, their shredders, disintegrators, and office machines are always hard at work.



### PROJECT HIGHLIGHTS

With the help of KTL Solutions, Whitaker was able to:

- Upgrade from Microsoft Dynamics GP 9 to Microsoft Dynamics GP 2013 seamlessly.
- Implement Dynamics CRM to automate their outdated custom built FilemakerPro.
- Integrate a communication system between all new solutions for a more effective approach to business processes.
- Increase their average service completion billing time from 7-10 days to 1-2 days.
- Integrate various ISV solutions to enhance usability.

KTL Solutions began working with Whitaker Brothers Business Machines, Inc. (Whitaker) in 2006 as their go-to VAR. In 2014, Whitaker need to upgrade their business system infrastructure, including ERP, CRM, ecommerce, and service models. Their ERP system software was Microsoft Dynamics GP 9 with patchwork SAP Business One. Whitaker found this to be unsupportive of their business requirements. Additionally, the CRM system being used was a custom built version of FilemakerPro, while their ecommerce platform was Magento. Each of these systems were stand-alone applications with no integrations and communication in between.

### TACKLING THE CHALLENGES

After further analysis by KTL Solutions' consulting and development team, it was discovered that Whitaker's Service Division was also experiencing tremendous inefficiencies using a paper-based process to support the service model in Microsoft Dynamics GP. Their service techs were processing manual forms, typing their entry of service form into Dynamics GP. Together these system processing challenges contributed to Whitaker spending excessive amounts of labor on daily business processing of sales purchases and service orders. On average, their service completion to billing time was anywhere between 7 to 10 business days.

### KTL SOLUTIONS GETS TO WORK

When KTL Solutions analyzed each of the Whitaker business processes, it became apparent that the most efficient formula would be to systematically define and deploy a cloud based software solutions system. As a starting

PUT YOURSELF IN A POSITION TO  
**SUCCEED**



# WHITAKER

Whitaker is a family owned and operated company who has been in business for over 70 years. They service the Federal Government, DOD contractors, and commercial businesses by providing data destruction equipment and services at competitive prices.



Set and System Solutions Provided to Client

## KTL SOLUTION SET

- Microsoft® Dynamics® GP
- Microsoft® Dynamics® CRM
- Industry ISVs

## KTL SYSTEM SOLUTIONS

- Financial and Accounting
- Operations
- Ecommerce
- Workforce Management
- Business Intelligence
- Custom Development
- System Integration
- Training and on-going support



point, KTL Solutions began with an upgrade to Microsoft GP 2013, coupled with a system migration from FilemakerPro to Microsoft Dynamics CRM.

With the deployment of Dynamics CRM, KTL Solutions was able to offer Whitaker the benefits of standardized and automated quote offerings coupled with a dynamics customer database from which to launch their coordinated marketing plan. These enhancements permitted a more efficient order processing flow along with a Dynamics marketing database platform to communicate with their customers.

KTL Solutions also introduced k-eCommerce, a trusted ecommerce ISV. The k-eCommerce software integration allows for web order automation with cross system functionality into their Microsoft Dynamics GP and Microsoft Dynamics CRM systems.

The upgrade to Dynamics GP 2013 introduced many features, to include items such as:

- Integrated Credit Card Processing and Capture
- Custom SmartLists creation to meet data processing and management data reporting requirements
- Automation of email for invoices and order confirmations

**“...It became apparent that the most efficient formula would be to introduce and systematically define and deploy a cloud based software solutions system.”**

The upgrade also allowed for KTL Solutions to integrate other trusted ISV products such as Avalara, which permits the automation of sales and use tax across multiple state, local, and district jurisdictions; and FieldConnect, a software solution for connecting the field and back-office. The upgrade to FieldConnect allowed a more mobile work functionality. Whitaker supplied all of their service techs with tablets, gaining more efficiency. These communicated directly with their home base solutions allowing the elimination of a service representative to manually enter service documentation in Dynamics GP, as the tablet already communicated and updated when a ticket was closed out. Overall, this also increased the service call response rate allowing more processed calls per day, improved inventory cost control, and the service completion billing time was now an average of 1 to 2 days rather than the 7 to 10 days.

## KTL SOLUTIONS BRINGS BUSINESS EXPERTISE TO PROJECTS

The KTL Solutions team was able to meet the precise requirements of Whitaker because they know how to address challenging business constraints. With deep development and business process experience, KTL was able to solve the tough challenges Whitaker dealt with in order to make their business successful.

Since the installment of Whitaker's system solutions and integrations, they have been able to migrate from a focus on existing business processes to a more structured focus towards the continued growth of their business. KTL Solutions is still their trusted VAR and we continue to be in constant contact continuing our relationship while sharing our advice on issues and updates that come about for their solutions.



www.ktlsolutions.com  
sales@ktlsolutions.com  
1.866.960.0001 (Toll free)  
301.360.9743 (Fax)

