

PLANAR SYSTEMS

Experlogix manages multi-currency quoting for Microsoft Dynamics CRM™ customer



Company

Planar Systems
Wilsonville, OR
www.planar.com

Corporate Details

Planar Systems is the leading provider of Digital Visual Messaging solutions to the retail, public venue and institutional markets. Clarity delivers solutions designed for a wide variety of settings including: restaurants, financial services companies, arena and conference facilities, transportation centers, events and large corporate facilities.

Benefits

- Create quotes in multiple currencies
- Improve forecasting accuracy
- Eliminate redundant data entry and human error
- Pass correct manufacturing part numbers to ERP
- Add MS CRM opportunity & quote products quickly



Experlogix, Inc.

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Planar Systems has helped revolutionize the sign industry with its large-scale, changeable, flat-panel displays commonly found in fast-food restaurants, airports and department stores.

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When Planar expanded their market by acquiring a French company, their sales team needed to create quotes in U.S. dollars and Euros with Microsoft CRM. "We needed a strong multi-currency solution for our Microsoft CRM system. After evaluating another product, we selected Experlogix Configurator because of their ease-of-use, user interface and total cost of ownership," says Kim Buchanan, IT Administrator.

"I have received absolutely fabulous service, great response time and endless patience with the learning process."

- Kim Buchanan, IT Administrator

Today, Planar's sales reps simply choose an account and a product price list in Microsoft CRM. Experlogix automatically recognizes the price list selected, applies the correct currency, and computes the totals. Reps also enjoy Experlogix's catalog-style user interface, enabling quick selections of products.

"The added benefit of using Experlogix gave our sales force the time-saving ability to add opportunity and quote products with significantly less mouse clicks (in MS CRM). We saved an immeasurable amount of time. Our forecasting accuracy has improved as well because Experlogix does all the calculations," comments Buchanan.

Planar also eliminated double entry on the sales order side of their business. According to Buchanan, the sales department uses a marketing nomenclature when selling display units. Their manufacturing ERP system uses different part numbers which roll-up to features and options.

"Experlogix gave us the ability to configure our display units and pass the correct part numbers that made up the entire display to our other system. This effectively eliminated the double entry and human error," says Buchanan.

