



Orchid Case Study:

ORCHID'S EXTENDER HAS WESTERN MARKETING FIRING ON ALL CYLINDERS

“Orchid Extender just might be the most powerful third party app ever. The sky's the limit.”

IAN COOK, KERR CONSULTING, THE WOODLANDS, TEXAS, USA

Company

Western Marketing, Inc. (WMI) is a leading regional supplier and distributor of petroleum products, lubricants, coolants, and other automotive and engine-related accessories. They also supply bulk-oil storage tanks and pumps. They were founded in 1953 in Abilene, Texas before expanding into other states to service a growing customer base. (www.westmktg.com)

Challenge

WMI were finding that standard Sage 300 data structures and functionality didn't support some of their business requirements. Specific issues they were keen to address were:

1. Identifying the date on which each invoice had been processed.

(Sage 300 captures the Invoice Date, Posting Date and associated Fiscal Year and Period for every invoice. Due to the volume of invoices, and the number of imported invoices, WMI also needed to know the date of invoice entry to facilitate reconciliations and customer reporting.)

2. Data validation shortcomings, e.g.:

- a. Lack of controls to ensure the correct price list was used on all orders.
- b. Items missing standard cost records, with flow on impacts to the integrity of COGS and sales commission calculations.
- c. Difficulty enforcing a rule that all sales be in whole units, while simultaneously permitting fractional units of measure in the Sage 300 database (necessary as many items are held in partial gallons).

3. How best to create and maintain custom data about individual bulk-oil tanks, to support Business Intelligence reporting.

E.g. tank capacity, tank ownership (WMI or their customer), and whether or not the tank has an automated gauge.

Solution

WMI's solution provider, **Kerr Consulting**, had successfully used **Orchid Extender** on other sites, and immediately saw its potential here.



With their client's support, the following were implemented:

1. An Event was configured in Extender to track inserts via the OE Invoice and Credit Note Views, allowing WMI to identify new transactions with confidence.
2. Python scripts were developed to run within Extender, creating enhanced business logic to ensure that:
 - a. All Ship-To Locations are assigned to the correct price list, based on parent Customer and the customer billing cycle.
 - b. Orders are automatically placed on hold if there is no valid standard cost record in the location details for an ordered item.
 - c. Transactions could not be created for quantities equating to partial units.
3. A Custom Table and a Custom Screen were created using Extender to easily look up individual oil tanks at Customer Ship-To Locations, and store additional attributes.

Result

Ian Cook of Kerr Consulting was delighted with the outcome for their client, saying:

"I am VERY, VERY happy with the results... Having now used Extender as an Audit Logger, UI control tool, and custom table tool it really is the bomb!"

The client, WMI, was equally enthusiastic. Thanks to this imaginative use of Orchid Extender:

- They can now be confident in the accuracy of statements for payment sent to their customers.
- They have far greater confidence in the integrity of their Sage 300 data when creating transactions and calculating commissions.
- Custom data about oil tanks, held in their Sage 300 database, can be combined with sales data as input into Business Intelligence reports. This gives them great visibility of tank utilization, and allows them to determine whether individual tank placements are cost effective.

Why Orchid?

Orchid Systems, a global Sage Endorsed and Gold Development Partner, has been part of the Sage community for over 20 years. We develop innovative Add-ons to enhance the functionality of Sage 300 (formerly Accpac).

We are a winner of multiple awards from Sage, including International Development Partner of the Year. All our Add-ons are developed within the Sage Software Development Kit (SDK), so they look and feel like other Sage 300 modules.

Visit our website anytime, or contact us to find out why over 5,000 Sage 300 sites worldwide rely on Orchid Add-ons every day to help their businesses work smarter.



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