



## IT Introduces Transparency and Lower Operational Costs

Here's the story of a Bengaluru-based firm that turned to technology to iron out the kinks that marred its accounting processes. It also wished to minimise costs and ensure its operations were transparent. Technology helped it achieve all three goals!

Since its inception in 1996, Strategi Automation Solutions has been in the business of manufacturing custom-built factory automation equipment and distributing motion control product-based solutions to industries like packaging, printing, machine tools, instrumentation, et al. At the very outset, the company's management team had realised that to succeed and grow, it was critical to adopt the necessary technology tools. And this strategy has proved to be a tremendous growth-enabler for the organisation. In a span of less than two decades, the organisation has opened up six branches across the different parts of the country and offers over 700 products from reputed suppliers. No wonder, its revenue has crossed ` 13 crore.

### Higher revenues, courtesy technology.

The Strategi Automation team was keen to adopt the relevant IT software solutions to ensure that its seemingly complicated activities ran smoothly on a daily basis. R Sivakumar, Assistant Manager, Strategi Automation Solutions, recounts: "If not for technology, most of our time would have been spent on tracking client records and verifying information about them." Today, the technology solution deployed has not only increased the company's efficiency but has also cut costs and saved time.

### Moving with the times

From the beginning, the Strategi team was clear that the accounts and inventory management ought not to be done, manually. Hence, it was decided in 1996 that the Tally 5.4 version would be deployed as the accounting software. The

company has continued to use the same software for over a decade. However, in 2009, the management realised that Strategi required a customised feature-rich application that had more features and functionalities to cater to the complex requirements of the business, which had grown and diversified with time. These features were not available in Tally 7.2, which was with them since 2005. The firm needed something beyond the simple book keeping application that merely recorded transactions. Sivakumar explains the requirement that called for a change in the transaction management software: "We sell a lot of products and it is difficult to keep track of stock and client payment details. For instance, we have to collect a C-Form from our clients for the invoices prepared. If they fail to submit it, we end up paying the balance tax due, with a penalty. We were not aware that many clients had never sent us the C-Form, yet consignments were moving to them on a regular basis. We learnt this the hard way and hence wanted to deploy a solution that could address all our operational complexities".

When Tally.ERP 9 came to the rescue Strategi hence decided to upgrade to Tally.ERP 9 by investing between ` 10,000 and ` 15,000 and got it customised to meet its requirements. The management began to record its requirements for the new system. First and foremost, the top brass wanted a system which could alert them about the C-Forms pending for over 180 days. The system also generated notifications to such clients so that they could be prompted to submit the form, and once that was done, they could continue taking the delivery of their consignments. The ERP system: Tuned to

Strategi's needs The company also decided to go for a customised quotation model, capable of generating invoices, online too. "Earlier, we used to use Excel spreadsheets to create quotations. Now, when we type the model number, all related details appear, automatically, as the information has been pre-loaded in to the software. This means that we do not have to hunt for details related to products pertaining to price and capacity," says Sivakumar. Strategi also decided to include additional descriptions of its products in the quotation module. The previous version only had room for a brief description of 10 to 15 characters, which permitted only the model number of the product. But the new system allows users to include nearly 100 characters. This covers the model name, price, capacity, domains it can be used in and other relevant details that are helpful while sending quotations to clients.



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### Restricted access to vouchers

The company also wanted the new software to address a few requirements like voucher security. Sivakumar explains: "Vouchers include goods receipt notes, delivery notes, stock journals, manufacturing journals and physical stock journals. All stock movements need to be recorded and maintained in stock registers. Strategi wanted to make sure that this data was secure." When customising voucher security, user rights have been restricted for the creation, alteration, cancellation, deletion and printing of a specific voucher type. The administrator can also restrict the use of default Tally facilities like upload, e-mail,

and export. Data synchronisation and Dashboard creation At present, Tally.ERP 9 is being used in the Bengaluru and Mumbai branch of Strategi. This required stock synchronisation as data from all centres is being entered in the software here, says Kishor S, Enterprise Solutions Manager, BE Solutions, a Master Tally partner. "Hence, we customised the ERP such that the company's management team could view the stock value, closing balance, warehouse details, last purchase details and information about the last sales like dates, quantities, prices and whom it was sold to," he adds.

The dashboard feature was also enhanced as part of the software customisation process. "It is now possible to look for things like transactions over a certain period of time, get a list of top customers, the current bank balance, outstanding receivables, overdue payments, and top selling products, with just a click. This would have taken days to accomplish without the help of technology," Sivakumar asserts. Going forward, Strategi is also planning to enable employees to log in from anywhere in the world to access their Tally records, and also implement a Tally feature that allows users to take print outs on used stationery. Since the adoption of technology has so far proved good for Strategi, the company plans to make IT a part of its future.