Luxury-Hotel Robe, Towel & Linen Provider Boca Terry Transforms Operations with Acumatica Retail Edition

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OVERVIEW

Boca Terry LLC, a supplier of towels, robes, and linens to luxury hotels and others, survived on QuickBooks, ACT! and Microsoft Access for more than two decades. The company was supported by a single external software developer. As the company grew, the owners realized they needed a more modern platform for growth. Boca Terry deployed Acumatica Retail Edition, gaining deeper visibility into their operations, improved inventory control, and increased process automation which allowed the business to run much more efficiently.

KEY RESULTS

- Implemented a single, connected, modern commerce platform that made owners' lives easier
- Gained instant visibility into all operations, improving decision making and capturing opportunities for growth
- Eliminated manual data entry through automated financial reporting, saving employees' time
- Created tailored dashboards with real-time metrics, including profitability by SKU, geographic location, and customer
- Gained visibility into overseas shipping information and in global warehouses, improving customer service
- Automated processes, increasing employee productivity and customer satisfaction
- Eliminated $500 a month customer-statement mailings, saving $6,000 annually with an automated process
- Acquired remote access, increasing productivity, saving time, and shortening response times

CHALLENGES

When 5-star hotels such as the Ritz Carlton and the Four Seasons and luxury brands such as Royal Caribbean Cruises need new linen, bathrobes, towels, or slippers they contact Edward and Bruce Cohen of Boca Terry, located in Deerfield Beach, Florida.

Founded in 1996, the two garment industry executives have built an impressive organization based on offering quality products at competitive prices and providing outstanding customer service.

"I had been importing out of China and Europe for years," says Bruce Cohen, Boca Terry President. "And Edward was doing manufacturing in the Dominican Republic, so we knew how to manufacture and sell."

The company started with terry-cloth towels and bath robes and later expanded its product line to include other linens as well as lounge chair covers and luxury spa products, and, when the pandemic hit, face masks. The company contracts with manufacturers overseas, embroiders brand names on items in-house or subs them out, and ships products from distribution centers located in Florida, California, Canada, China, and the United Kingdom.

Boca Terry's business operations include manufacturing, wholesale distribution, and eCommerce. About 98 percent is B2B, and the rest, B2C. The company has its own eCommerce store on BigCommerce, and an outsource partner sells its products on Amazon.

Years ago, the company deployed QuickBooks for accounting, ACT! for CRM and a customized Microsoft Access program for sales order entry—none of which were connected. The order entry program was created by a friend of the Cohens' father, who also maintained and supported the software for more than 20 years.

Company
Boca Terry
www.BocaTerry.com

Industry
Distribution and Retail:
Luxury robe, towel, linens

Number of Employees
Approx. 15 full time employees

Locations
Deerfield Beach, FL with distribution centers in Canada, China, and the UK

Products
Acumatica Retail Edition with:

- CRM
- Inventory Management
- Procurement
- Sales Order Management
- Accounts Receivable
- Accounts Payable
- eCommerce Connectors
- Financials
- Banking
- Warehouse Management

and extended applications that include:

- Avalara
- BigCommerce
- eBizCharge
- PaceJet

Customer Social Sharing Details

- www.facebook.com/bocaterrybathrobes
- www.instagram.com/bocaterrybathrobes
- https://twitter.com/bocaterry
- www.youtube.com/@bocaterrybathrobestowelssp5138
- www.linkedin.com/company/boca-terry-llc

Partner Details

i-tech

i-Tech Support, Inc
www.i-techsupport.com

"We were very fortunate," says Edward Cohen, CEO and who runs the company's finance operations. "Anytime Bruce or I needed a custom report, we would call (the software developer) and he would develop it."

"But later, we started to realize if something happened to him, what would we do?"

The Cohens also realized that their reliance on antiquated and disconnected software programs hindered operations and growth. For example, the sales staff hand wrote orders, but then someone else typed them into the Access database. That person was also responsible for shipping. "She was never getting anything done," says Edward. That duplicate process was also prone to errors.

The old on-premises computer system was slow, hard to search, and because information was stored in three applications, executives lacked visibility into what was happening in the business. Bruce, Boca Terry president, had to ask Edward to create simple finance reports like a P&L and email it to him. Not only did that interrupt Edward's day but it also took time to pull information from three places and create the report.

Edward constantly fielded customer calls on the status of their orders. Locating the answers meant he had to search for information in several applications, a trying task.

NetSuite Increased Complexity

The Cohen brothers sought to replace their Access developer with someone new, a move they eventually decided against due to the reliance on a single person and older software. To remain competitive long-term, they knew they needed a modern business solution.

Initially, Boca Terry chose Oracle NetSuite. "We needed a solution to join our three different applications into one, and didn't know about Acumatica when we went with NetSuite," says Edward.

But three months later, they reopened their search for a better ERP because NetSuite increased the complexity of some of their workflows rather than streamlined them.

"NetSuite was pretty difficult to use, and inventory IDs were limited to a certain number of digits. We were facing changing all of them because we used dashes," Bruce says. Boca Terry also had a difficult time with NetSuite's out-of-country support teams.

SOLUTION

Acumatica Retail Edition

After a second ERP search, Boca Terry decided to implement Acumatica Retail Edition with help from Acumatica partner i-Tech Support Inc.

"Acumatica's integration and ease of use seemed better than NetSuite," Edward says. "When we viewed the demos, it was so much more outstanding than anything else we looked at. It fit like a glove and the integration of what we do as a company seemed like it would be a smooth transition."

BENEFITS

With Acumatica, Boca Terry executives have full visibility into critical business information that they use to make real-time, data-driven decisions. They understand where inventory is located, what they have in stock, and can deliver the right products to the right places at the right times. Financial information is available instantly through various dashboards. Boca Terry now operates much more efficiently, the Cohens say.

"We don't have to take an hour or so to figure out what's going on," says Edward. Nor does he have to pause his day to compile spreadsheets and email updates to Bruce, who operates out of California, and didn't have access to necessary data previously.

Boca Terry has decreased the number of days it takes to ship an order because Acumatica provides full visibility into what they have in inventory, which is information they didn't have available previously. The shipping manager concentrates on the task on hand, and no longer wastes time manually typing in lengthy sales orders.

When supply chains were disrupted by the pandemic, Boca Terry's inventory orders stretched from just a few months to more than six months. With Acumatica, Boca Terry gained visibility into what was on the water and when it was expected to arrive so they could give customers more accurate estimates. That was visibility they didn't have previously.

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> – Edward Cohen,
> Chief Executive Officer,
> Boca Terry

Now, anyone logged into Acumatica sees when robes or towels are scheduled to arrive and can provide this information to customers. Visibility and notifications around stock and container tracking allowed Boca Terry to improve its customer service.

The company has also improved its order-to-cash cycle. They now accept more credit cards, and processing payments is much easier with Acumatica's integrated credit card processing.

With Acumatica, many of Boca Terry's administrative tasks are now automated, which has led to untold time and monetary savings.

Improved Operational Efficiency

The Boca Terry team is more efficient. The sales team enters orders directly into Acumatica, which has eliminated the need for a full-time order entry person. That person now focuses on shipping and getting orders out faster.

To track order status, employees log into Acumatica and can instantly view an order and its status.

Previously, they had to call Edward, who manually had to spend time looking and searching for the required information. With real-time information always available in Acumatica, Edward has eliminated at least eight calls a day, he says, and has recouped hours he now uses to concentrate on running the business.

"Acumatica made my life so much easier. It's unbelievable," Edward says.

For example, "If I didn't update customers and salespeople every week, they wouldn't know what estimated due dates were, and for me to update them every week, it would take me a week to do it," he says.

"Acumatica and i-Tech were able to develop a system for us that when a container leaves the Far East or wherever it's coming from, we upload the whole container with everything on that purchase order. We put in an estimated ship date when it's due because once it goes on the water, we know within three days when it's due in the country."

Because every item on a purchase order is automatically available, the Boca Terry team does not spend an hour manually receiving every single style against a purchase order when a container arrives. "When a container comes, all we have to do is hit 'received' and you're done," Edward says. Once items are received, anyone can see that information and share it with customers.

In addition, Boca Terry has insight into the profitability of every item it sells, information executives didn't have before. "Previously, what would happen every quarter or month is that we'd go into QuickBooks. And then look up our FOB (freight on board) and then we'd have a total freight and total duty figures," says Bruce. "We could get an overall gross margin. But now we can get a gross margin on every individual style instantly."

"We can also drill into purchase orders to look at notes whereas it would take me three or four steps previously."

Automated Manual Tasks

When a sales order is entered into the system, an automatic order confirmation is sent to the customer; no one has to remember to send out an email. Customer statements are no longer printed and mailed, which has saved roughly $500 a month, Edward says.

When a custom order is booked, Bruce and Edward—who approve and create purchase orders for overseas factories—are automatically notified; sales staff doesn't have to remember to email them. Previously "If someone didn't tell you about it, we wouldn't even know," Edward says.

If a certain style of robe or towel is ordered that needs to come from a certain supplier, an automated report notifies the Cohens if a purchase order hasn't been written for those items. "We don't miss anything now," Edward says. "Before it was a nightmare."

"Anytime someone inputs a sales order, it comes up with the correct price," says Bruce. "That didn't happen before. You'd have to look up the base price and then go to a mill's spreadsheet just to make sure the information was correct."

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> Boca Terry

Acumatica's native connector for BigCommerce automatically transfers online orders, says Edward. "In the old Access system, we couldn't bring in sales, and we were probably losing $500,000 a year because we weren't really connecting it. We would just make journal entries of cash coming in and not associating it every day. Now, every single sales order that comes in from the e-commerce site is automatically uploaded and in Acumatica so we're able to see that sale."

Shipping e-commerce orders is easier and takes less steps, he adds. Rather than going into BigCommerce, downloading all the information, printing purchase orders, and then sending information back to customers, "it's all done automatically."

Gained Remote Access

Acumatica's mobile application allows executives to access information from anywhere, which has freed them to work from anywhere and enjoy vacations more. "I just got back from Antarctica," says Edward. "I was onboard a boat that had very limited Wi-Fi, but it was great because I could sit in my stateroom and pull up (company files) and look at what was going on." On previous trips, he says, it was hard to remotely log into an on-premises server, and many times he couldn't secure a connection.

The remote sales team can log in from anywhere and has instant access to information no matter where they are. They no longer phone Edward seeking information and can be more productive. Having instant access means Boca Terry isn't limited by VPNs, Bruce says.

Acumatica offers an unlimited number of user licenses, which means executives don't worry about escalating software costs when adding additional employees. Previously, the Cohens delayed adding additional sales people because of the increased per-user costs and remote access headaches.

Poised for Growth

The Cohens continue to refine Boca Terry's operations and are considering adding functionality via Acumatica's vast library of third-party application providers, including one that would automate more shipping functions, says Bruce. They are confident that Acumatica's road map and continuous improvement plan will help Boca Terry grow well into the future.

"Acumatica is very receptive to listening to their customers and making sure that we can continue to grow," Edward says, praising the company's annual platform investments and growing community of third-party developers.

"If someone is dealing with two to three or four different applications all day long, Acumatica is the way to go," he says. "Acumatica is a no brainer."

"Acumatica is allowing us to run the company better," he adds. "We're much more efficient, we have answers quicker, and it gives us the confidence in what we're doing on a daily basis. We have accurate information at our fingertips and can make decisions quickly."