



Optimizing Operations

e-automate inventory counts & service cancellations

Compiled by: Elizabeth Marvel, Office Technology Magazine

Following are two questions submitted by dealer members as part of BTA's Dealers Helping Dealers resource and some of the answers received. These answers and others can be found in the members-only section of the BTA website. Visit www.bta.org/DealersHelpingDealers. You will need your username and password to access this member resource.



If you are an e-automate user, what inventory tool are you using for physical inventory counts? We use ScanIt, but it has its limits and issues. I would love to hear from other dealers.

"We are a small ECI user and just use manual count sheets, but we only have three techs."

*Dennis McGalliard, owner
Western Business Products, Redding, California*

"We do physical counts only."

*Wayne Piskin, vice president
CCP Solutions, Farmingdale, New York*

"We do it manually."

*Stephen Valenta, president
Offix, Gainesville, Virginia*

"We have tried scanning and editing an Excel document with limited success. Hand counting is the standard."

*Shaun Easter, service operations manager
Seminole Office Solutions, Longwood, Florida*

"We're still using the old manual way of printing the count lists and counting. It takes two people just over an hour."

*Jeffrey Taylor, president
Kingsport Imaging Systems Inc., Kingsport, Tennessee*

What is your process when a customer cancels a service contract?

"We request they give us an email in writing and we will cancel the service agreement once we pick up the unopened toners."

*Dennis McGalliard, owner
Western Business Products, Redding, California*

"We check the terms and dates of the contract. We try to see what we can do to keep them. All of our contracts are for the term of the lease. We will send a final bill for the remaining months owed."

*Stephen Valenta, president
Offix, Gainesville, Virginia*

"Thirty days written notice of intent sent to contracts. Based on the contract, they can be liable for the remaining amount of money based on time. We send them to sales to see if there is a way forward as partners."

*Shaun Easter, service operations manager
Seminole Office Solutions, Longwood, Florida*

"If it's for a machine we replaced, we simply cancel on that day with the final meter and prorate if necessary. If it is a cancellation by the customer, we ask for the request in writing with the final meter and typically cancel on that day. We have the option for a 30-day notice, but rarely enforce it."

*Jeffrey Taylor, president
Kingsport Imaging Systems Inc., Kingsport, Tennessee*

"We request cancellation in writing and, once received, we have our designated account manager reach out to the person requesting the cancellation to understand why. If it's because they're being approached by a competitor, we can offer a revised contract that matches or beats the new price. Unfortunately, for those accounts we cannot save, it's usually because the owner has decided to retire or sell the business and the new owners have an established relationship (i.e., national or corporate accounts) with another dealership. We are able, thankfully, to salvage a majority of the requests by just digging in and finding out what it causing the request for cancellation."

*Christina Dargis, vice president of operations
Copy Concepts Inc., Fort Myers, Florida*

"We have a 90-day cancellation clause, but we usually only enforce 30 days on a monthly CPC contract."

*Lynn Pickford, president
Precision Copy Products Inc., Clairton, Pennsylvania* ■

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