BTM GLOBAL NETSUITE

YouCopia Organizes and Optimizes Operations for a "Woo Hoo" Customer Experience

Since its founding in 2009, YouCopia has helped millions of people discover the "woo hoo" feeling of being organized. The company creates useful, customizable products for a wide variety of items throughout the home. With almost effortless set-up (no tools or installation required), anyone can transform their space into a happy place.

Challenge: Enhance Operations and the Customer Experience

YouCopia sought to improve the efficiency, organization, and speed of its operations to ultimately enhance the customer experience. As a QuickBooks user, the company searched for a more modern ERP platform to better automate orders and seamlessly process fulfillment, invoicing, and customer collections. In addition, it wanted an ERP that could manage orders from its retailer network, with visibility into real-time financials.

"Our products help customers organize their home so they can focus on what matters most," said Shael Patel, director of finance at YouCopia. "Along those lines, we wanted to improve and better organize our operations so we could focus on what matters most – serving customers."

QUICK FACTS

- ➤ Implementation of NetSuite SuiteSuccess Manufacturing
- ➤ Landed-cost customizations
- ➤ Two days per month saved with financial automation
- ➤ BTM's SuiteBoost Managed Services

Solution: NetSuite SuiteSuccess Implemented by BTM Global

In NetSuite SuiteSuccess Manufacturing, YouCopia found a purpose-built, cloud-based ERP to keep pace with the company's evolution by streamlining and optimizing operations.

BTM Global was selected to lead all aspects of the NetSuite implementation, including full data migration and integration with third-party partners.

- Analyze, develop, and implement a landed-cost customization for tracking duties and freight costs that gives YouCopia more accurate financial insights
- Major integration and customization work regarding EDI requirements
- Celigo integration for Shopify stores, enabling YouCopia to receive and fulfill orders
- Trained the YouCopia team on NetSuite order-to-cash processes, financials, procure-to-pay and inventory management

"BTM's expertise in extending NetSuite beyond native fields gave us the ability to create processes that fit our exact needs," said Patel. "Our teams can do more with less, like using automation to process orders fast – even as our volume grows."

Results: Efficiencies and Insights to Support Growth

As YouCopia continues its growth trajectory, BTM worked alongside the team to implement a NetSuite system and functionality to support specific needs.

"BTM has been responsive and diligent, helping us fully utilize NetSuite's power," said Katie Kiley, director of operations at YouCopia. "NetSuite had the functionality, and BTM ensured it got us to a new level of productivity and ease."

Improved order automation and accuracy

YouCopia has significantly improved order validation and the automation of subsequent processes. The team can now review orders for pricing discrepancies or other issues prior to fulfillment. Any issues are caught ahead of time, protecting YouCopia's stellar customer service reputation.

Calculating royalties and commissions are done with just a few clicks, thanks to saved searches. YouCopia is also saving an enormous amount of time with automated invoice processing.

"We used to type in every single invoice," said Patel. "Now, can process thousands of invoices with one click. Our employees have refocused their time on doing more value-added work."

Instant reconciliation

"Prior to NetSuite, we were uploading CSV files of credit card information to the bank. We had two people dedicating a full day just to credit card uploads," said Patel. "Now we have direct feeds, and the work is done in half a day. So it's saved us about two days of work per month across the two people. That's huge."

Faster document and label handling

Documents are auto-populated and printed with custom fields, such as order totals and item specifications. No more manual edits or PDF files!

Extending the partnership: BTM's SuiteBoost Managed Services

YouCopia chose to continue the partnership with BTM via its SuiteBoost managed services for NetSuite. SuiteBoost plans can include functional, development, and administrative support services. BTM provides a dedicated contact and team to ensure YouCopia maximizes the power of NetSuite.

"We were really happy with BTM's partnership throughout the NetSuite implementation, and the ongoing support helps us shift and pivot as we play around with the system," said Patel. "For example, we had an issue with our bank feed, and BTM stepped in to create a custom solution that got everything back up and running. It's good to know BTM is there to help us when we need them."

Find out more at **btmglobal.com**
Contact us at **612-238-8800**