

Many small and midsize businesses use manual processes in their warehouses and other areas of their operations. Businesses that manage inventory, reorder products, and do other essential tasks by hand are missing out on the advantages of business automation. A business automation platform speeds up tasks, eliminates double data entry in multiple solutions, improves data accuracy, and helps workers be more productive.

In this white paper, we'll cover more than a dozen operations that a business automation platform dramatically improves in the following order:

- Picking
- Packing
- Shipping
- Emailing Customers
- Ordering
- Bill of Materials
- Billing and Invoices
- E-commerce
- Warehouse Management
- Reports
- Unit of Measure Conversions
- Calculating Part Costs
- Multi-currency Conversions
- Supply Chain Management

***Even if some of these [business] processes are being automated with various software solutions, further automation through a common business platform, like Fishbowl, will greatly increase efficiency.***

First, we'll address the shortcomings of attempting to handle these things manually and then we'll explore the advantages of automating them. Even if some of these processes are being automated with various software solutions, further automation through a common business platform, like Fishbowl, will greatly increase efficiency.

### **Picking**

**MANUAL:** Picking manually involves printing out a pick ticket or perhaps even having to do it solely by memory. A warehouse worker must walk through aisle after aisle of their warehouse, hunting down every last item to fulfill a single order.

**AUTOMATIC:** There's a better way to pick orders. Once a purchase order is received and a sales order entered, the business automation platform lets employees know what needs to be picked to fulfill it. A warehouse worker can then use a wireless barcode scanner or other mobile device to look at a routed list of the warehouse and see where everything is. That way, they don't have to spend valuable time going up and down aisles in search of difficult-to-find items. Warehouse workers can scan items' and locations' barcodes while picking to improve the speed and accuracy of the whole picking process. Plus, the workers can perform batch picks, meaning that they can pick multiple orders at the same time. So they can get a lot more work done in one walkthrough instead of having to go back and forth multiple times

### **Packing**

**MANUAL:** Whoever is doing the packing has to eyeball it. It's up to them to decide which container will best fit the item(s) being shipped in it. Packing lists are also an essential part of the pick, pack, ship process, but each item in the order will most likely have to be added from memory and physically typed in. This can lead to typographical errors or other costly mistakes.

**AUTOMATIC:** Some shipments are already prepackaged, so workers can simply mark them as auto-packed to skip that step in the software. Companies can set default containers, and then warehouse workers can decide which boxes or cartons to use, depending on the nature of the order. Packing lists are generated automatically based on information straight from the order, eliminating any pressure on the warehouse worker to get it right every time. Plus, managers can check the status of orders every step of the way in the packing process.

### **Shipping**

**MANUAL:** To ship products to customers without an automated platform, businesses have to call various shipping companies or go to their websites to get price quotes. Shipments may or may not have tracking information attached to them, and they're difficult to keep organized.

**AUTOMATIC:** In a business automation platform's interface, workers can instantly generate price quotes from shipping companies, such as UPS, and determine which price and delivery time will work best for each shipment. They can ship multiple orders at the same time by doing them in batches. Plus, they can get regular updates on the progress of shipments as they make their way to their final destinations.

### **Emailing Customers**

**MANUAL:** Without any automation, it's up to warehouse workers to manually send emails to customers when they finish preparing an order.

**AUTOMATIC:** Businesses have the option to set up automatic emails to customers when their order is shipped. The email contains the auto-generated packing list and tracking number(s) so customers will know what is coming and when they can expect it.

### **Ordering**

**MANUAL:** In a manual setup, goods flow out of a warehouse, and they don't get reordered until someone notices that they're nearly or completely out of stock.

**AUTOMATIC:** A better way to keep parts and products in stock is to set up automatic reorder points on everything in a warehouse. That way, when a product is in danger of running out, warehouse workers are immediately alerted to that fact and they can order more. They can even set up their inventory system to automatically generate a purchase order for the part in the appropriate amount.

### **Bill of Materials**

**MANUAL:** When it comes time to manufacture new items, manufacturers usually start by creating a bill of materials. If they have to do this manually, it can hold up the entire manufacturing process. Adding each part to a bill of materials every time a new product

needs to be manufactured is an arduous task fraught with dangers of errors creeping in or something essential being left out.

**AUTOMATIC:** With a business automation tool, manufacturers can save every bill of materials they create and then duplicate it anytime they want to make another product that is identical to the one they made before. This ensures the manufacturing process can get going right away instead of being held up at the start. And it standardizes the products by keeping the parts going into them the same every time. Not only that, but companies can use Auto Manufacture Orders to automatically generate the necessary documents and start the manufacturing process as soon as any part falls below its reorder point.

#### **Billing and Invoices**

**MANUAL:** Double data entry is quite common when working with billing and invoices in multiple solutions. When a company receives a purchase order, they also have to add the financial information from it into their accounting solution to create an invoice.

**AUTOMATIC:** A business automation platform integrates inventory, accounting, shipping, and many other solutions together. For example, after a new purchase order is completed, the accounting solution is informed and told to record that purchase in the general ledger. And when a purchase order is received, the accounting solution generates an invoice for the customer listed on that purchase order.

#### **E-commerce**

**MANUAL:** When selling products online, companies have to be careful that they don't oversell. If their various accounts on Amazon, eBay, Etsy, and other e-commerce platforms are not connected, they run the risk of committing the same products to different customers if they make multiple sales close together before they can manually update the quantities available.

**AUTOMATIC:** If all of a company's e-commerce accounts are connected through a single interface, such as Fishbowl Commerce, then after a sale is made through one, every other gets updated on a scheduled basis. This significantly reduces the risk of overselling. Once a product is sold, it's quickly taken out of circulation on other websites where it is listed for sale. Companies can schedule as many syncs as necessary throughout the day to keep up with the number of sales that they expect to make. This synchronization saves a lot of time in the order fulfillment process. New orders get pushed from e-commerce solutions to Fishbowl automatically, and then Fishbowl updates the e-commerce solution with tracking numbers and order statuses.

#### **Warehouse Management**

**MANUAL:** Warehouse management is a huge challenge without the benefit of automation. Cycle counts often have to be conducted on a weekly basis, if not more, to update constantly changing inventory records. It's also difficult to standardize warehouse management processes, especially when a company has inventory in multiple warehouses.

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**AUTOMATIC:** A business automation platform allows companies to streamline their warehouse management. Warehouse workers have to perform far fewer cycle counts because their inventory records get accurately updated to reflect changes in real time from ordering and selling products. They can also check inventory levels in multiple locations from a single interface and quickly transfer products between warehouses, when necessary. In addition, a company can organize its inventory into three categories: A, B, and C. Products in the A category are small items that are sold frequently and they make up the vast majority of the inventory. Products classified under B and C are larger, more expensive, and have less of an impact on overall sales. A business automation platform can automatically separate every product into each category by calculating their sales over a certain period of time.

### **Reports**

**MANUAL:** If a company keeps inventory records with a pen and paper, it can forget about the idea of running reports on its data. If it uses Excel spreadsheets to contain information about inventory quantities, vendors, sales orders, purchase orders, etc., then it's possible to obtain reports. But it's also extremely difficult and time consuming.

**AUTOMATIC:** With all of the information on a company's inventory, sales, and other details contained in a business automation platform, warehouse workers can instantly generate detailed reports to see gross sales by product or salesperson, study inventory trends by location, and look at their inventory turnover ratio. Not only that, but reports can be used to generate barcodes for parts, which help with inventory tracking, reordering, cycle counting, and other important warehouse tasks. There are virtually endless numbers of reports that can shed light on all sorts of aspects of a company's operations. These reports can be set up to be viewed in a dashboard, making it easy for each employee to see the information contained in them.

### **Unit of Measure Conversions**

**MANUAL:** When products come in, they are frequently counted by pallets, boxes, or other large containers. But when they're sold, it's usually on an individual basis. This means that companies have to convert their units of measure because otherwise their inventory and accounting records would fail to accurately measure the number of items coming in and going out.

**AUTOMATIC:** A business automation platform can automatically use unit of measure conversions to eliminate this worry. When a carton of products is received, there's already a system in place to instantly separate the value of each product in that carton from all of the others. So when it comes time to sell them they'll be in the right unit of measure.

### **Calculating Part Costs**

**MANUAL:** Adding up all of the costs that go into a final product can be more difficult than it might seem at first. In addition to the total cost of the parts and materials, there's also labor cost and overhead. All of this can be difficult to calculate manually.

**AUTOMATIC:** By integrating manufacturing software with a time clock solution, companies can easily add time, labor, and overhead costs as line items on a bill of materials. That way, the total cost of the parts will be automatically added to those other

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components and it will produce the most accurate number as the total cost. This will help immensely during the process of setting product prices and when looking for ways to trim costs.

### **Multi-currency Conversions**

**MANUAL:** Companies that do business in more than one country (whether they're selling to customers overseas or ordering parts and products from foreign vendors) have to convert the money they receive or that they find on invoices into their home currency. This ensures proper bookkeeping and inventory valuation. Doing these currency conversions by hand requires daily checks of currency comparisons because they change all the time in relation to each other.

**AUTOMATIC:** Instead of doing multi-currency conversions by hand, companies can create and receive both sales orders and purchase orders in any currency and then automatically convert them into their home currency. They can also assign currencies to their vendors and customers in other countries and let their automation platform do the conversions and send the updated financial figures to their accounting solution.

### **Supply Chain Management**

**MANUAL:** Supply chain management means keeping track of all of the vendors, shippers, warehouse space, and other components of the ordering process. Doing all of this manually requires a lot of time and effort, and it can still be inadequate when supply chains get disrupted or vendors don't offer the best payment terms or service.

**AUTOMATIC:** Being able to track vendor performance over time is a crucial part of supply chain management. By storing data on incoming shipments, including their on-time deliveries, payment terms, and other factors, a business automation platform gives companies the data and the tools they need to negotiate with vendors and explore their options. When a problem occurs and a shipment is delayed, warehouse managers are quickly alerted in order to avert unnecessary delays.

### **A Better Operation Through Automation**

**AUTOMATION IS THE WAY TO GO.** By automating key processes in the warehouse and elsewhere, a business not only improves its overall coordination between departments, but it also saves a great deal of time and money while vastly improving the customer experience. As a company grows, it needs to integrate its shipping, e-commerce, manufacturing, warehouse management, payment gateway, CRM, and accounting solutions together.

Fishbowl's business automation platform is a powerful solution because it not only automates individual processes, but it also allows all of them to work in conjunction with each other. A company's several software solutions don't have to work independently, but they can work as one when they're all connected through Fishbowl. Fishbowl integrates advanced manufacturing and warehouse management solutions with dozens of other business software and hardware:

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- Amazon
- Android
- Apple
- Authorize.Net
- Avalara
- BigCommerce
- DHL
- Dropbox
- eBay
- Endicia
- FedEx
- Fishbowl Anywhere
- Fishbowl Commerce

- Fishbowl Go
- Fishbowl Hosted Services
- Fishbowl SalesPoint
- Fishbowl Time & Labor
- HighJump TrueCommerce EDI
- LemonStand
- Linux
- Magento
- Microsoft Surface
- Motorola
- OnTrac
- QuickBooks

- QuickBooks Canada
- QuickBooks Online
- QuickBooks Payments
- Reckon
- Salesforce
- ShipRush
- ShipStation
- ShipWorks
- Shopify
- SolidWorks
- SPS Commerce
- Symbol
- 3dcart

- Unitech
- United States Postal Service
- UPS
- Volusion
- Wasp Barcode
- Windows
- WooCommerce
- X-Cart
- Xero
- Zebra
- Zen Cart
- And many more

#### **ABOUT FISHBOWL**

Fishbowl's business automation platform is the No. 1 requested manufacturing and warehouse management solution for QuickBooks® users, and it is also a popular standalone solution for organizations or enterprises looking to track assets. For QuickBooks and Xero® users, it provides the same advanced features and flexibility larger organizations enjoy, but at a fraction of the cost.

**Learn more about Fishbowl's business automation platform and sign up for a free trial at [www.fishbowlinventory.com/free-trial](http://www.fishbowlinventory.com/free-trial)**



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