



On-the-Go Selling

How AIDP Streamlined Its Customer Workflows with White Cup CRM + BI

When efficiency, mobility, and data visibility became top priorities, AIDP modernized its sales operations with White Cup – giving reps more time to sell and teams a single view of every customer relationship.

At a Glance

Customer: AIDP, Inc.

Industry: Nutritional ingredients distribution

ERP: Epicor P21

Headquarters: City of Industry, CA

CRM Users: 12 sales reps, full cross-functional rollout

Challenge: Fragmented sample tracking and limited mobile access

Solution: Migration from TDF to White Cup CRM + BI

Results: Streamlined field workflows, faster follow-ups, and unified visibility across teams

A Platform Built for How Sales Teams Work

AIDP needed a system that would travel with its reps, not slow them down.

“We were looking for a true CRM – something mobile, flexible, and customer-focused. TDF served us well for operations, but we wanted a platform that felt more like a sales enablement tool. White Cup checked every box.”

— Taylor W., AIDP

White Cup CRM + BI gave AIDP a modern, intuitive platform that connects sales, service, and leadership around a shared view of customer activity — whether in the office or on the road.

Mobility That Changes the Game

Before White Cup, reps relied on spreadsheets and emails to plan customer visits. Now, everything they need fits in the palm of their hand.

“One of the biggest wins has been mobility. The team loves being able to open the app, see nearby accounts on the map, and plan their day around it. It’s a completely different level of visibility than we’ve ever had.”

Powered by White Cup’s Near-Me Mapping feature, reps can instantly see accounts, open opportunities, and nearby prospects in real time — turning travel time into selling time. From the mobile app, they can access customer history, log visits, and follow up instantly, creating a faster, more connected sales process.

From Samples to Strategy

Sample requests are central to AIDP's sales cycle, but managing them used to be slow and disjointed.

"Before, if we requested a sample, we'd just get a tracking number days later with no visibility into where it was in the process. Now we can see where every sample stands, assign tasks, and keep projects moving. It's a lot more efficient."

With White Cup CRM, AIDP built a custom pipeline tailored to its unique business needs. Each stage reflects a key step in the sample-to-sale journey — from request and shipment to customer feedback — giving sales and business managers clear visibility into what's next.

By transforming an informal process into a structured, measurable workflow, AIDP now keeps projects moving faster and ensures no opportunities fall through the cracks.

Smarter Selling with AI and BI

To save time on documentation, AIDP's field team is piloting AI Field Notes, which automatically records meetings, summarizes discussions, and generates follow-up actions.

"AI Field Notes is saving us huge amounts of time. Instead of sitting down after every meeting to type out notes and to-dos, the follow-ups are already there. It's like the 'set it and forget it' version of note-taking."

And White Cup BI gives the team instant visibility into the data they need — helping them respond faster and identify new opportunities.

"If one of our reps is visiting a customer, they don't have to call customer service or wait until they're back at their desks — they can answer on the spot."

That same access has empowered customer service and business managers as well, reducing internal back-and-forth and enabling more proactive customer engagement.

Visibility That Drives Results

With CRM and BI connected, everyone from reps to leadership now sees the business in real time. Dashboards have become a key part of AIDP's management rhythm, turning reviews into data-driven conversations.

"The dashboards have changed how we talk about the business. Leadership can log in and see the state of the business in one snapshot. Instead of asking 'what's going on,' they can literally see what's going on."

The visibility is paying off. Reps are identifying gaps in customer activity, reigniting dormant accounts, and creating new opportunities.

"White Cup makes us proactive instead of reactive. We're catching things earlier, closing gaps, and having smarter customer conversations."

With White Cup CRM + BI, AIDP has unified its people, processes, and data — helping every team member work smarter, move faster, and stay connected wherever business happens.

Why AIDP Chose White Cup

-  Epicor Prophet 21 Integration
-  CRM + BI combination
-  Powerful dashboards
-  Mobile App Made for Field Sales
-  Unified, real-time visibility

Ready to modernize how your team sells in the field?

See how White Cup CRM + BI helps distributors like AIDP centralize data, simplify workflows, and stay connected — wherever business happens.

[Learn more at whitecupsolutions.com](https://whitecupsolutions.com)