

Stockton Graham & Co.

A Client Success Story



Stockton Graham: A Blend for Success with MAS 200

Business Challenge:

Creating an easy to use accounting system for “non-accountant” users, with strong reporting capabilities.

Results Achieved:

- More control over equipment and other fixed assets
- Expanded distribution and manufacturing segments
- Greater flexibility over information tracking and reporting

“Business Technology Solutions is focused on providing quality products and outstanding customer service – values we both share.”

919-781-2900
www.btsolutions.net

The Challenge

Stockton Graham, a wholesale specialty beverage and accessory supply company, was enjoying tremendous growth and business transformation. They had recently sold the retail portion of their business and were expanding their distribution and manufacturing segments. Their inventory was growing and they felt constrained by their existing Peachtree solution. They felt they needed to move up to a new solution that would provide them access to:

- Better reporting and distribution capabilities to determine which brands were selling and which ones were not
- Know what inventory levels they should maintain to minimize inventory stock costs and enable them to make more strategic purchasing decisions; and
- Enhanced sales order processing functionality that would accommodate a larger number of users so more of their staff could enter and assess the information to make decisions.

Stockton Graham's president and co-owner, Jeff Vojta, knew he needed a new accounting solution and was familiar with the packages available. He also knew he needed an experienced implementation partner who would understand their growth, provide guidance with process flows and improvement suggestions, and be committed to their success.

The Solution

For the past several years, Jeff had been discussing his business and accounting solution with fellow CPA, Lissa Johnsen, president of Business Technology Solutions (“BTS”). Having known Lissa for many years, Jeff knew Lissa and BTS had the experience to guide Stockton Graham to the next level of growth. In addition, Jeff knew that Lissa shared his CPA background and a common customer-centric business philosophy with a commitment to customer satisfaction. As Stockton Graham continued to grow, it was natural for Jeff to contact BTS to discuss migrating from Peachtree by Sage to Sage MAS 200.

The BTS team took the time to really understand Stockton Graham's business and their objectives for the new accounting solution, chief concerns, and business processes. The BTS implementation team went through the solution them, sharing and demonstrated the package for with the team at Stockton Graham insights into how different people would use the solution and detailing how Stockton Graham could achieve their goals using MAS 200.

Additionally, the BTS implementation team built a unique implementation plan around the skills and knowledge of Stockton Graham's personnel to develop a conservative, yet realistic proposal - a fact appreciated by Vojta.



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Stockton Graham chose to work with BTS because they felt that BTS would be a genuine implementation partner with the knowledge and experience to implement the MAS 200 solution and provide the training and support to ensure that the Stockton Graham team would be self-sufficient.

The Process

BTS upgraded Stockton Graham from their existing Peachtree solution to a MAS 200 core accounting, distribution and light manufacturing solution supplied by the same publisher as their Peachtree solution - Sage Software.

The BTS staff conducted a project kick-off meeting to ensure that all parties involved in the implementation were informed of and agreed to the key milestones, project tasks and responsible team members. The outcome of this work was the creation of a project work plan and associated tasks that served as the drivers for the successful implementation. The BTS implementation team also worked with Jeff and his team to ensure that the setup and options within MAS 200 matched Stockton Graham's data input and workflow. They made sure that the distribution processes in the system matched their business process flow and would be easy for all of Stockton Graham's employees to use, including the "non-accountant" users.

A new chart of accounts was designed for Stockton Graham that would provide enhanced reporting on their product lines and revenues/expenses. MAS200 was then configured to give them access to the data from the Crystal Reports module, as well as the ability to query their data using the SQL language. They then redesigned their inventory structure so that the product line and item specific data would provide real time information on the performance of their inventory. These designs enabled them to immediately begin making better management decisions. The customizable features of MAS 200 have also given them greater flexibility over information tracking and reporting.

BTS performed the full implementation including installation, project management, training, conversion and testing. BTS also provided Stockton Graham with basic procedures and training manuals to help them effectively use their new accounting solution, while remaining available for questions and new situations as they arose.

"When it was time to look for a new accounting solution, we went to Business Technology Solutions. The staff at BTS is knowledgeable and experienced in software solution selection, set up and implementation."

-Jeff Vojta,
Co-owner

A Happy Ending

Stockton Graham later added additional software modules to their solution, including FAS Asset Accounting and ACT! Contact Manager. Using Sage FAS, they now have more control over their equipment and other fixed assets, and ACT! has allowed them to integrate their sales and contact management needs with their back office solution.

Stockton Graham has the information they need to make strategic purchasing decisions, manage their inventory and deliver outstanding client service at the same time. With their MAS 200 software in place and the confidence of knowing that the BTS team is available at any time to support their use of the software, Stockton Graham now has the ability to expand the distribution and manufacturing segments of their business and add new modules and system features as their beverage and accessory supply business grows.

Business Technology Solutions is a Sage Select Partner:



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919-781-2900 - Phone
919-781-8580 - Fax