ERP for Small Businesses: A Buyer’s Guide
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The nature of business has changed dramatically in the Internet age. And small businesses may be feeling the greatest impact.

With advances in technology breaking down geographic barriers, even companies with just a few million dollars in annual revenue find themselves operating on a global scale, with customers, suppliers, and other business partners located all over the world.

Most small business owners welcome these changes because they have given them access to markets that previously were open only to the largest corporations. At the same time, however, small business owners are starting to realize that being on equal footing with large enterprises when it comes to access to markets also forces them to deal with many of the same problems that confront larger organizations.

For instance, the cost of shipping and receiving goods across borders must be accounted for when devising business strategies. In addition, complying with environmental regulations, tax laws, and other policies in multiple countries increases the complexity of running a business.

Global competition also is forcing companies—both large and small—to do more to meet the needs of individual customers. For manufacturing companies, this means building and managing more products, as well as maintaining better records of customer preferences when it comes to products, methods of delivery, and issues related to service.

Small businesses that count larger enterprises as customers often must also adopt a specific form of information technology (such as electronic data interchange [EDI]), connect to a particular supplier network, or transmit documents in exact formats.

With all these factors to consider, small business owners increasingly have to confront one essential question: Do we need an enterprise resource planning (ERP) system?

On the surface, that's a difficult question for small business owners because ERP systems historically have been associated with large organizations that fill large number of orders for numerous customers. There also is a widespread perception that installing and maintaining an ERP system is a time-consuming, expensive undertaking—and much too complex for any small business.

Fortunately, however, technological advances have transformed the nature of ERP as well.

Numerous vendors now offer ERP systems that are easy to install, use, and maintain, putting them well within the reach—from both a technical and financial standpoint—of small enterprises.

These systems give small businesses the tools they need to compete in the global marketplace without busting their budgets.

As more small business owners realize that Word documents and Excel spreadsheets are not sufficient for managing a twenty-first-century enterprise, they no doubt will want to explore this new generation of ERP systems. Using this Buyer’s Guide from Technology Evaluation Centers would be a good first step on that journey. It provides a basis for tackling all the issues that come with evaluating and selecting the right ERP system for a particular business.

If you're a small business owner considering ERP, you undoubtedly have numerous questions. Should you choose an on-premise, on-demand, or open-source system? Should you manage the selection and implementation process yourself, or rely on outside consultants?

These questions—and many others—are addressed in this guide. Open it, and begin the process of improving the way you run your business.
This guide is intended for owners and managers of small companies, and anyone interested in knowing more about enterprise resource planning (ERP) systems.

There are many definitions of “small business,” but most of them are similar—usually differing only in annual revenue levels and employee numbers. These definitions may differ from one information source to another, and largely depend on the objectives of a grouping process. The revenue and employee parameters tend to be higher in the United States (US) but lower in Europe or Asia, and also depend on industry type and other factors. For the purposes of this guide, we categorize small businesses in the following way (all dollar figures expressed as USD):

- **Micro businesses**: 1 to 20 employees, with revenues under $5 million
- **Small businesses**: 20 to 200 employees, with revenues from $5 to 50 million
- **Small to medium businesses**: 200 to 500 employees, with revenues of $50 million and over

These three categories of small business typically share the following characteristics:

- They have no full-time in-house IT staff, or they have only a few people tasked with hardware and network maintenance and office applications support.
- The majority of IT-related decisions are prepared and made by the top managers or business owners, who are usually not professionals in complex corporate informational systems selection, deployment, and exploitation.
- Employee knowledge of ERP is minimal or based only on experience with legacy systems.

The small-business demand for corporate information systems grows every year, as evidenced by the increased number of small companies selecting and implementing ERP systems. This market segment is too significant to be ignored, and software vendors have certainly responded. Unlike ten years ago, they now offer a considerable number of systems of all types and price points designed or adjusted for small businesses. To understand how big the market is, here are some US statistics (source: United States Small Business Administration, *The Small Business Economy: A Report to the President 2009*): out of over 6.1 million employers, 5.9 million (or 96 percent) are companies that employ less than 100 permanent employees. More than 36 percent of all US full-time workers are small business employees. We observe similar proportions in almost every country—and this curve seems to be rising yearly.

On the other hand, the number of small businesses currently using an integrated computer-based management system is not that high. The majority of small businesses use non-centralized manual or spreadsheet-based procedures, or use legacy systems that often do not reflect a challenging reality and in fact retard a company’s development and growth.
The trends and market tendencies described in this guide are related to small business IT products that have existed for at least a few years. They’ve been proven and put to the test in the context of the global economic downturn. Indeed, many managers and business owners see this challenging time as a good opportunity to rethink and remodel their businesses, and prepare for forthcoming growth and demand escalation.

**ERP Systems for Small Business: Do They Actually Help?**

Small businesses face the same business challenges as medium and larger companies, including pressure from competitors; global economic volatility; the need to attract and retain new customers; and the need to reduce expenses and increase profitability. Small organizations also have additional constraints, including limited access to financial resources; higher day-to-day operational costs; and difficulties in hiring highly qualified (and therefore expensive) personnel. These factors can impede growth and complicate business processes.

Software products intended for small businesses usually accommodate specific small-business requirements and fall within two major application categories:

- light versions of mid- or large-sized ERP systems with scaled-down functionality (these versions are typically easier to install and maintain)
- ERP systems that were specifically designed and developed for small companies

Each category certainly has its own weaknesses and strengths, but either can be appropriate for a small business. Also, during the last few years, the distinction between the categories has become blurrier: large-scale traditional systems have become much more affordable (without significant functionality loss), while at the same time, vendors of small business systems have extended and developed their packages considerably.

In terms of the ERP software selection process, small businesses have their own requirements and unique characteristics:

- They are usually more sensitive to economic uncertainty and to the ramifications of flawed business decisions, and therefore need to make more careful investment decisions.
- Fewer financial resources are available for IT projects, as access to financing is more problematic.
- They are less savvy with respect to IT generally and ERP systems particularly, and are more dependent on external information and field experts.
- Strategic IT decisions are made by owners or top management, based mostly on personal experience or open-source information.
- Despite their relatively small size, they often require the same level of ERP functionality as larger companies.
Here are some of the expected general benefits of ERP implementations for small businesses:

- An ERP implementation project is a perfect opportunity to discover, define, and streamline your business processes and make them more effective.

- An ERP system implementation also gives you the opportunity to revise and update master data (i.e., non-transactional data such as product information, customers, suppliers, technology, etc.).

- You can more clearly understand your cost structure and identify opportunities for improvement.

- In a manufacturing environment, an ERP system provides traceability for finished goods—costing structure and sources are fully visible, from raw components to the final step.

- Company data is centralized, data duplication is eliminated, and data entry errors are minimized.

- Personnel are involved in decision-making processes via access to reporting tools. All required decision support data can be made available instantly and with minimum effort.

- A well-implemented ERP system dramatically improves your level of customer service.

- Sometimes savings can be realized by reducing the number of personnel, or by making existing staff more efficient.

**ERP for Small Businesses: Myths, Misunderstandings, and Challenges**

When it comes to ERP for small businesses, there’s no shortage of misunderstandings and myths— as well as very real challenges and dangers. We summarize some of what you need to know below:

**Myths and Misunderstandings**

- **Myth #1: ERP systems are too sophisticated, and are really only for medium and large companies.**
  This used to be true, about 10 to 15 years ago. Now, ERP vendors have adapted their products and even designed brand new applications specifically to meet the needs of small businesses. They have reduced the level of complexity for users, and the variety of offerings on the market is really quite extensive. On the other hand, many small companies have “raised their game” (in the sense that they often compete in the same markets as bigger companies) and now require functionality similar to that which is available to their larger rivals (but on a smaller scale, of course).

- **Myth #2: Small businesses do not need ERP: everything can be successfully managed and tracked manually by using relatively simple tools such as Excel or basic accounting systems.**
  A business may be relatively small, but that doesn’t mean that the number of transactions it performs daily is trivial. Furthermore, there is a huge difference between “simple” and “ERP-based” approaches to doing business. A centralized data repository, one-time data entry, instant data availability for analysis, and imbedded best business practices: all these technological advantages can and should be demanded by smaller-sized businesses, no matter what industry they are working in. Modern customers also expect the same high level of service and support from small businesses that they receive from large businesses, and ERP systems can also help a lot there.
• Myth #3: Hardware and the associated infrastructure are prohibitively expensive. In the past, personal computers were not always powerful enough to run ERP systems. This is no longer true. Similarly, network bandwidth is available today to a much greater extent. New technologies have transformed ERP systems into software that any user’s computer is capable of running simultaneously with other office applications. Furthermore, software as a service (SaaS) does not require any special hardware purchase or installation beyond an Internet connection.

Challenges and Dangers

• The total cost of an ERP package is difficult to calculate.
  This depends heavily on the software selected, and differs from one package to another. The purchase of an ERP system requires certain efforts in terms of a company’s financial and strategic planning. In addition to relatively high cost, the cost structure for an ERP system is often a complex and confusing subject for unsuspecting purchasers, as it consists of many separate items and usually cannot be easily grasped as a whole. It must be noted that the SaaS-based ERP deployment approach has dramatically turned the cost and payments model into an easier-to-understand and more user-friendly model.

• ERP implementation can result in significant changes to your existing business processes.
  All ERP implementation projects generate many changes in all aspects of a business. At the same time, most small companies feel they need to change their management principles and styles once they have reached a certain level of growth: the goal is to become a company with professional management, an internal hierarchy, and formal back-office procedures. Not all companies succeed in this transition from a “friendship club” to a structured business machine. However, this point in a company’s life cycle can be an advantageous opportunity in its own right, and is an extremely important step along with ERP system implementation.

• Selecting software can be difficult for small businesses.
  This is especially true if almost no one at your company is experienced in ERP selection, implementation, and exploitation. And while there is a large volume of information on the Internet, real-life examples of competitors and peer companies, and advertisements galore from software vendors, the ultimate decision must be based strictly on your own vision and strategy. Another component of this challenge is that ERP-related strategic decisions are usually made only once, and must be well thought out and reasonable, as the system should be capable of helping run your business for at least 7 to 10 years.
Take the Quiz: “Do I Really Need an ERP System?”

To help you understand whether an ERP system is required to help you run your business, we created the following quiz, which contains some of the most important questions a company should answer when thinking about buying an ERP system.

For each answer, you will receive a number of points. At the end of the quiz, add your points to calculate your final score.

1. How much duplicate work do you do on a daily basis? (e.g., entering received payments in both the accounting system and spreadsheet software)
   a. 0 to 30 percent of my work (0 points)
   b. 31 to 60 percent of my work (5 points)
   c. 61 percent or more (10 points)

2. How many different systems/programs do you use every day? (including office tools and interfaces with other systems)
   a. 1 to 3 systems/applications (0 points)
   b. 4 or 5 systems/applications (5 points)
   c. More than 5 systems/applications (10 points)

3. What are the chances you can recover information from a computer that cannot be used anymore?
   a. No chance. If I lose a computer, the information is lost. (10 points)
   b. It might be possible. We sometimes back up data on CD/DVD or external hard drives. (5 points)
   c. No problem. We have a server and we do regular backups of all important information. (0 points)

4. How easily can you exchange information between employees?
   a. We send files by e-mail, but we often lose track of different versions or cannot find the files. (10 points)
   b. We share drives and try to be organized. (5 points)
   c. We have an e-mail and file server and we all use it. (0 points)

5. How easily can you follow what’s going on in your company? (this refers mainly to inventory, sales, purchasing, and accounting)
   a. We try to gather data from everyone, but we have to cobble the information together. (10 points)
   b. My employees send me reports and we try to keep track of what we do. (5 points)
   c. We have very well defined workflows and work procedures. (0 points)

6. How do you keep track of sales orders and invoices?
   a. We use a system provided by a partner, spreadsheets, or an accounting system, or a combination of all three methods. (10 points)
   b. We have software in place, but still need a second tool, especially for reporting. (5 points)
   c. Everything goes into one system. (0 points)

7. How do you track inventory?
   a. On paper and in spreadsheets. (10 points)
   b. We use spreadsheets in conjunction with old software which is not very reliable. (5 points)
   c. We already have a software system that is suited to our needs. (0 points)

8. How do you think your company growth will affect all the processes above?
   a. No effect. Our business will not become much more complex. (0 points)
   b. Somewhat. Things are going to change, but not dramatically. (5 points)
   c. Drastically. We definitely need to review our business processes soon. (10 points)
9. How many people are using a computer in your company?
   a. 1 to 10 people. (0 points)
   b. 11 to 50 people. (5 points)
   c. More than 50 people. (10 points)

10. What are your future plans for your company?
   a. We intend to grow rapidly and aggressively approach new markets and customers. (10 points)
   b. We will grow, but slowly. (5 points)
   c. We’re fine and do not intend to change much. (0 points)

Here’s how you should interpret your answers:

0 to 25 points: You are not planning for much company growth, or you already have an ERP system in place, and you are pretty well organized. In both cases, there is no real need for a new ERP solution: you’re doing very well with what you have right now.

26 to 50 points: You are planning for some growth in the future, or you have an old system or package of tools that are quite efficient. Even though an integrated solution might help you in your daily tasks, the investment required probably outweighs the benefits.

51 to 75 points: The solutions or tools you are using are either obsolete or lack the complexity required by your business processes. Although they may be useable, you should start looking to implement an ERP product in the near future.

76 to 100 points: You need an ERP system and you need it badly. Still, this does not mean you have to buy the first product you see that meets your needs. It is vital that you conduct a best-practice ERP selection process.

Caveat: Any business thinking of ERP must have reached a certain level of maturity before seriously considering ERP implementation.

For the purposes of this guide, we define **business maturity** as follows:

- Your business has a long-term business plan, and mid- and short-term strategies for business development. It has time-framed goals, and a clear understanding of how to achieve them.

- Top management or business owners consider business processes improvements as a vitally important potential benefit of the ERP implementation project.

- Top management or business owners recognize the benefits of data centralization and one-time data entry principles.

- Business processes are well defined and, ideally, described in written form. At a minimum, the business processes description task should be a component of plans for the near future.

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The Path to ERP for Small Businesses

An ERP selection and implementation project is a real challenge for any organization—and small businesses are no exception. Certainly, the project is smaller, and the level of complexity is lower than for medium or large enterprises; but it will still require ongoing attention and involvement from management.

There are two major categories of small businesses, and their implementation strategies differ:

#1: Small businesses not running a centralized ERP system, or that use only an accounting application or sets of spreadsheets

- Human-related activities will need very close attention from the ERP project manager. A business’s personnel will require ERP education sessions and highly detailed user training. Users may resist change, so you should consider issue resolution approaches at the project planning stage.

- Master data file preparation can be a serious challenge for your project team. If you have various sources of dispersed information, you will need to conduct a significant effort of data preparation, entering, migration, and verification.

#2: Small businesses that are currently running an ERP system where central data is available but that are thinking of replacing the ERP system

- The master data creation task for these companies is easier, since most of the data will be migrated from the old system. Still, considering the fact that databases from different vendors have a different structure, data migration can still be a challenge.

- Personnel education and end-user training are easier, as employees are already experienced with the previous system. On the other hand, users will naturally compare the new system with the old one, and attempt to apply the logic of the old system when using the new one, which can lead to system misuse.

When looking for business software, small companies often fall into the trap of being selected by vendors instead of proactively selecting vendors. This usually happens because small companies sometimes do not allocate sufficient time and resources to the process, and do not have selection methodologies in place. The risk is that if a vendor’s offering appears to fit the company’s needs, decision makers will select that product without further investigation. We’ll spend the rest of this guide addressing some considerations for selecting an ERP system that does match your business requirements.
Difficult Choices

When conducting research on ERP software, you will be exposed to many opposing and sometimes confusing points of view. Indeed, it can be difficult to distinguish current software trends from the issues that really matter to your business. We’ll turn now to some common dichotomies that you’ll encounter during your research, and explore the pros and cons of each:

- on-premise versus software as a service (SaaS)
- free and open source software (FOSS) versus proprietary software
- old technology versus new technology

On-premise ERP Software versus SaaS/On-demand ERP

SaaS/on-demand is an alternative to on-premise software. “On-premise” refers to the fact that the software is installed on a server in your company, and users access that server when they work. SaaS/on-demand vendors, on the other hand, manage the software and your data on their own servers, and users must connect via the Internet to do their work.

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<th>Pros</th>
<th>Cons</th>
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<tr>
<td><strong>On-premise</strong></td>
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• You have total control over your data  
• The product may cost less than SaaS in the long term.  
• Products are generally more comprehensive and mature.  
• You can work independently of Internet connectivity.  
• You have more flexibility in terms of modification or customization.  |  
• The product requires IT administration.  
• There may be hardware and software costs for additional systems or upgrades.  
• Updates can take more time and resources to apply, which affects usage.  
• Disaster recovery can be very slow or impossible.  
• You will pay recurring maintenance fees.  |
| **SaaS/On-demand**  |  
• The initial cost is often lower than for on-premise applications.  
• You can deploy the solution quickly.  
• The implementation cost is usually lower than for on-premise applications.  
• No or few internal IT staff are needed.  
• Updates do not affect your work very much.  |  
• The product may be more expensive than on-premise applications in the long term.  
• You may have limited access to your data.  
• You have less control over your data.  
• The market is not yet very developed.  
• You may be affected by technical problems on the vendor side.  
• Unique or non-standard requirements usually cannot be supported.  
• Integration with other corporate software is more problematic.  |
**Free and Open Source Software versus Proprietary Software**

Generally speaking, free and open source software (FOSS) refers to software provided under a license that allows you to freely study, modify, and distribute the software’s code. Conversely, with proprietary software it’s usually only the vendor and its partners that have the right to see, modify, or distribute the software’s code. Note that FOSS is not always free of cost. You will have to pay for support and maintenance from the vendor, just as with proprietary software. However, if you can handle customizing the source code yourself, you may elect to use an unsupported version. The vendor will probably charge you if you request support.

<table>
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<th>Pros</th>
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<tr>
<td><strong>FOSS</strong></td>
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<tr>
<td>• You have the freedom to change or modify the software as required.</td>
<td>• If you make your own customizations, you will need qualified personnel to properly maintain and develop the software.</td>
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<tr>
<td>• Thanks to FOSS communities, development, and innovation tend to be fast-paced.</td>
<td>• If you customize the application independently of the vendor’s supported version, the vendor’s updates might adversely affect your customizations.</td>
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<tr>
<td>• Competing vendors adopt each other’s changes, and adaptations from other members of the community are likewise incorporated.</td>
<td>• There are fewer mature open source ERP products.</td>
</tr>
<tr>
<td>• You pay for support, customization, and implementation from the vendor, but usually not for licenses.</td>
<td>• Generally, FOSS vendors are smaller and may not have as comprehensive a support infrastructure as larger proprietary ERP vendors.</td>
</tr>
<tr>
<td>• You are not subject to vendor lock-in (thus ensuring a certain safety if the vendor goes out of business or is bought by another).</td>
<td>• FOSS vendors may not have the revenue to fund new software development and grow with your company.</td>
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<th>Proprietary Software</th>
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<tr>
<td>• There is usually no need for dedicated in-house software customization programmers.</td>
<td>• You cannot change the source code.</td>
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<td>• The vendor is responsible for problems in the software.</td>
<td>• Vendors cannot easily adopt innovations to the software from a community or competitors.</td>
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<tr>
<td>• There is a large variety of stable, mature vendors with histories of successful customer implementations.</td>
<td>• It can be difficult to get proprietary vendors to implement new features in the software.</td>
</tr>
<tr>
<td>• Vendors have more a traditional and potentially reliable revenue model for funding software development.</td>
<td>• License fees present a higher up-front cost and may incur greater fees down the road as you expand and need more licenses.</td>
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<td></td>
<td>• Once you select a vendor, you’re usually stuck with that vendor for the life of your product, even if you are unhappy with that vendor’s support offering.</td>
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Old Technology versus New Technology

As you may have noticed—especially if you have already searched for an ERP system—there are products on the market that have not evolved much since they were first launched in the 1980s. However, they can still be very efficient, especially for small businesses. On the other hand, new technologies are in increasing use for small and large businesses alike. Researching new technology often requires deeper exploration of system compatibility and integration with modern technologies. It is fair to say, however, that some old platform-based applications have also been heavily modernized and so can be used without concerns about whether or not they are obsolete.

<table>
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<tr>
<th>Pros</th>
<th>Cons</th>
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| • Older software may be more robust than new systems.  
  • Many others have tested and used it before.  
  • Such systems are usually significantly cheaper than new systems.  
  • You will not require sophisticated hardware or software.  
  • There is a potentially large pool of experienced support personnel. | • The product may be discontinued by the vendor.  
  • Old software may be difficult to modify or customize.  
  • It is difficult to build interfaces between old systems and new systems. |
| Old Technology | New Technology | Newer systems are more user-friendly (from an interface perspective).  
  • Newer software is often easier to install and maintain than older software, and is generally easy to modify or customize.  
  • It is easy to integrate newer software with other systems.  
  • It is easier to use the software to communicate internally and with customers or partners (through Web services or similar technologies). | • Newer software is usually more expensive.  
  • Such systems haven’t had the long history of testing that older products have.  
  • New software is not always compatible with all types of hardware.  
  • It may be difficult to integrate new systems with legacy systems. |
Common Mistakes that Can Lead to Misfit ERP Selections

Sadly, there are hundreds of ways to select an ERP system that is not a good fit for your business. Below are just some of the real-life selection errors—often committed by large companies as well as small businesses—that have led to shelfware:

• failing to consider all potential users when determining needs for the new system
• shortcutting the selection process in an (ultimately doomed) attempt to save time or money
• failing to consider the requirements of partners such as suppliers or transporters
• relying exclusively on vendor demos and promotional materials
• basing the final decision exclusively on pricing or special discounts
• trying to find a system that does what the old one did
• planning to start implementation during high-activity periods (shipping season, year end, etc.)
• changing the selection team partway through the process
• expecting the ERP vendor to understand your business and industry practices as well as you do
• neglecting to allocate sufficient time and resources for user training
• neglecting the importance of change management
• failing to ask for and check references
• delaying the selection project by focusing on too many low-level requirements

Indeed, there are many questions you need to ask before determining which ERP system will best match your needs. To give you an idea of the ramifications of these questions, here is a sampling:

1. **Which system will be easiest and cheapest to implement and maintain?**
   Sometimes implementation and support costs can be much higher than the price of the software itself. You should calculate the cost for at least the next 5 to 10 years and determine which ERP software has the lowest overall cost (licensing plus implementation plus service) [also called total cost of ownership (TCO)]. Do bear in mind, however, that cheaper is not always better (conversely, a more expensive ERP system is not necessarily more fully featured).

2. **How easily can the software adapt to changing business processes?**
   The growth of your business will lead to changes in your business processes, and the system you choose should be able to change accordingly. This can be accomplished through modifications of the source code for open source ERP, through upgrades and patches provided by your vendor, or via integration to other business software.

3. **What is more important for users: an intuitive user interface, or strong functionality?**
   Ideally, an ERP system should present both an intuitive interface and robust functionality, but this is infrequently the case. Depending on your business processes and needs, it may be more efficient to trade off user-friendliness for a robust and proven ERP system.
4. How easily can we transition from the past and to the future?

Legacy data can be very important, so an ERP system should give you the option of easily importing and using it. The ERP system you select should also allow you to easily add new functionality as you need it. For instance, you may not currently require electronic data interchange (EDI), but if you need it in five years, the ideal system should allow you to turn it on, set it up, and start using it rapidly.

To help you avoid some of the perils of ERP selection, we provide an overview of ERP selection resources for small businesses below, followed by a listing of ERP software vendors that provide systems for small businesses.

ERP Selection Resources for Small Businesses

Consultation with analyst firms will help you get more insight and guidance on the selection process and the software marketplace. With a little searching, you’ll also discover a variety of Web directories listing software vendors and products (for example, TEC’s Vendor Showcase). These directories are useful for finding different products for comparison. Not all directories offer the same level of detail for comparison, however. Some will provide a high-level summary of the product’s functionality only, while others will allow you to drill down to very detailed functionality. Additionally, not all vendor directories have information on all the vendors that might be a good match for your needs, and it’s a good idea not to rely on one source only.

There are other online sources of information that can be used to have an idea what software can do (or not do). On user forums, you can find a lot of useful information, but you may need to search extensively to find it. You can also consult industry reports and white papers, which are sometimes offered free, but you’ll generally have to pay for them. Finally, blogs and personal Web sites of industry experts can provide valuable information that can be used in the software selection process.

ERP for Small Businesses: A Vendor Listing

The vendors in this listing target their products at small businesses looking for an ERP system. The ratings we provide are based on vendor claims regarding the level of support for functionality described below.

Given the large number of complex variables that go into selecting an ERP system, TEC does not recommend that you base an ERP selection decision on this listing alone.

The ratings in this listing focus only on the criteria related to functionality that we consider to be the most important for small businesses:

- inventory
- manufacturing
- sales
- purchasing
- financials
- payroll
We use the following rating system:

PARTIAL: the system supports between 1 and 75 percent of the criteria in TEC’s RFI
FULL: the system supports 76 to 100 percent of the criteria.

The **Industry** column displays only the industries that a given vendor supports extensively. As for the **Geography** column, the regions displayed are areas where the vendor offers any level of coverage and support (from partial to full). To contact these vendors, as well as other vendors that offer ERP software, please consult the vendor directory at the end of this Buyer Guide. TEC regularly updates ratings on products in its online Evaluation centers. To find the latest details on the vendors’ claims of functionality, login to [http://www.technologyevaluation.com/register.aspx](http://www.technologyevaluation.com/register.aspx).

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<th>Product</th>
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<tr>
<td><strong>Abas Business Software</strong> by ABAS Software</td>
<td>Established in 1980, ABAS is a leading provider of evolutionary and versatile ERP solutions for midsize manufacturers and distributors. More than 2,300 customers have chosen ABAS as their long-term ERP provider, and work successfully with the internationally applicable abas Business Software (ERP, PPC, MRP, eBusiness). ABAS is uniquely qualified to successfully implement international projects and has the combination of a unified partner network, strategic orientation, globally enabled software, and international implementation methodology that defines the roadmap to success.</td>
<td>Automotive Construction Distribution Electronics Furniture Engineering Manufacturing Metals Packaging Services</td>
<td>Asia Australasia Europe Middle East South America North America</td>
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<tr>
<td><strong>Aplicor</strong> by Aplicor Inc.</td>
<td>Located in Boca Raton, Florida (US), Aplicor Inc. is a global publisher of integrated sales, marketing, and customer service Web-based software. Established in 1999, the vendor offers enterprise-level applications online and on demand.</td>
<td>Chemicals Construction CPG Electronics Engineering Forestry Machinery Retail Textiles/Apparel</td>
<td>Asia Australasia Europe Middle East South America North America</td>
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<td><strong>Compiere ERP/CRM (3.5) by Compiere</strong></td>
<td>Compiere is the world’s leading provider of open source and cloud-based ERP business solutions. Powered by a revolutionary model-based platform, the company offers comprehensive, modern, highly adaptable and low-cost ERP solutions. Professional and support services are provided by the company and global network of partners operating in more than 40 countries.</td>
<td>Distribution, Manufacturing, Non-profit, Pharmaceutical, Retail</td>
<td>Africa, Asia, Australasia, Europe, Middle East, South America, North America</td>
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<tr>
<td><strong>Encompix (9.4) by Consona</strong></td>
<td>Consona Corporation is a business software and service provider dedicated to becoming your valued business partner by helping your company continuously improve business processes over time. Backed by an experienced management team and deep financial resources, Consona melds an aggressive acquisition program, strong balance sheet, solid customer relationships, and high-fit solutions into a value proposition that is unmatched by other vendors.</td>
<td>Automotive, Electronics, Engineering, Furniture, Machinery</td>
<td>Australasia, Europe, Middle East, North America</td>
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<tr>
<td><strong>Corefino Accounting by Corefino</strong></td>
<td>Headquartered in Sunnyvale, California (US), Corefino is a privately held company delivering outsourced online accounting and finance solutions. Its product combines financial expertise and best financial practices with the latest technology to offer affordable outsourced Internet accounting and finance systems.</td>
<td>Health, Energy, Electronics, Non-profit</td>
<td>Australasia, Europe, North America</td>
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<td><strong>COSS Systems (5.8) by COSS Systems Inc.</strong></td>
<td>COSS Systems offers a range of manufacturing software for small to midsized companies. It provides software that helps companies improve their data flow, thus increasing profitability, optimizing resource usage, and lowering the cost of growth.</td>
<td>Aerospace Automotive Electronics Furniture Machinery Metals Transportation</td>
<td>Africa Australasia Middle East North America</td>
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<td><strong>Cougar Mountain Accounting (9.0) by Cougar Mountain Software</strong></td>
<td>Cougar Mountain provides software applications for midsized businesses and non-profit organizations in need of accounting software, fund software, or point-of-sale (POS) software and hardware across a broad range of industries requiring customizable solutions.</td>
<td>Chemicals Electronics Engineering Food and Beverage Furniture Machinery Medical Devices Retail</td>
<td>North America</td>
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<tr>
<td><strong>Infor ERP Visual (6.5.2) by Infor</strong></td>
<td>Infor is headquartered in Alpharetta, Georgia (US), and has 116 offices worldwide. With its graphical nature, the Infor ERP VISUAL suite of products helps companies capture real-time data about their business processes.</td>
<td>Automotive Electronics Furniture Steel Transportation Distribution</td>
<td>Asia Australasia Europe Middle East South America North America</td>
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<td><strong>Intacct Accounting and Financial Management Software by Intacct Corp.</strong></td>
<td>Intacct is the market leader in cloud computing financial management and accounting applications for businesses and CPA firms, and the preferred provider of financial applications for AICPA business solutions. Intacct applications are used by thousands of businesses, from startups to public companies, and are designed to improve company performance and make finance more productive. The Intacct system includes accounting, contract management, revenue recognition, inventory, purchasing, vendor management, financial consolidation, and financial reporting applications, all delivered over the Internet via software as a service (SaaS).</td>
<td>Business Services and Consulting Computers, IT, and Software Education Finance and Banking Health Care Non-profit Recreational, Cultural, and Sporting Activities</td>
<td>North America</td>
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<td><strong>Microsoft Dynamics GP (9.0) by Microsoft</strong></td>
<td>Microsoft Dynamics is a line of integrated, adaptable business management solutions that enable companies and their people to make business decisions with greater confidence. Microsoft Dynamics offers a range of business applications designed to help midsized businesses become more connected with customers, employees, partners, and suppliers by automating and streamlining financial, customer relationship, and supply chain processes. Microsoft was established in 1975 and is headquartered in Redmond, Washington (US).</td>
<td>Non-profit, Furniture, Machinery, Retail, Steel, Distribution, Contractors</td>
<td>Africa, Australasia, Europe, Middle East, South America, North America</td>
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<td><strong>Microsoft Dynamics NAV (5.0) by Microsoft</strong></td>
<td>Microsoft Dynamics is a line of integrated, adaptable business management solutions that enable companies and their people to make business decisions with greater confidence. Microsoft Dynamics offers a range of business applications designed to help midsized businesses become more connected with customers, employees, partners, and suppliers by automating and streamlining financial, customer relationship, and supply chain processes. Microsoft was established in 1975 and is headquartered in Redmond, Washington (US).</td>
<td>Construction, Furniture, Distribution, Food and Beverage, CPG</td>
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<td><strong>NetSuite 2009</strong> by NetSuite</td>
<td>NetSuite helps growing and midsize companies manage business operations in a single, Web-based, integrated system which includes: finance, customer relationship management (CRM), inventory management, order management and fulfillment, and e-commerce. NetSuite is delivered as an on-demand service.</td>
<td>Computers, IT, and Software Electronics Service Providers Distribution Retail Non-profit Publishing</td>
<td>Africa Asia Australasia Europe Middle East South America North America</td>
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<td><strong>Openbravo ERP (2.40) by Openbravo</strong></td>
<td>Openbravo, headquartered in Spain, develops open source enterprise management systems. The company sells to its clients through its partner network. Its programs encompass a suite of services and professional tools that allow partners to build business based on Openbravo and to offer professional services and implementations to users.</td>
<td>Non-profit Retail Textiles/Apparel Distribution Service Providers</td>
<td>Africa Asia Australasia Europe Middle East South America North America</td>
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<td><strong>TRAVERSE (10.2) by Open Systems, Inc.</strong></td>
<td>Open Systems was founded in 1976 on the premise of delivering powerful accounting software solutions to small and mid-market customers. Throughout its more than 25 years, Open Systems has partnered with thousands of independent resellers, consultants, and developers in order to deliver accounting software solutions to over 250,000 small, growing, and mid-market software users.</td>
<td>Automotive CPG Food and Beverage Distribution Office Equipment</td>
<td>Asia Australasia Europe South America North America</td>
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<td>Pronto-Xi Enterprise Management System (rel. 670) by Pronto Software</td>
<td>Pronto Software is an international enterprise resource planning (ERP) software company with over 30 years of experience. The company’s integrated business solutions are designed to help its customers manage their growing enterprises and support their goals of maximizing productivity, streamlining supply chains, and delivering high-quality customer service.</td>
<td>Automotive Chemical Construction CPG Electronics Engineering Medical Devices Retail</td>
<td>Africa Asia Australasia Europe Middle East South America North America</td>
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<td>Ramco ERP Enterprise Series and Ramco onDemand ERP by Ramco Systems</td>
<td>Ramco Systems provides ERP II Solutions and custom-built offshore applications services across a wide range of industry segments. Ramco products and solutions are based on the business process platform Virtual Works to provide companies with the flexibility they need to respond to evolving market conditions and needs.</td>
<td>Aerospace Finance and Banking Chemicals CPG Engineering Food and Beverage Machinery Medical Devices Textiles/Apparel Distribution</td>
<td>Asia Australasia Europe Middle East South America North America</td>
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<td>Sage MAS 90 ERP (4.1) by Sage</td>
<td>From small start-ups to larger organizations, Sage software solutions help companies manage their business processes. Formed in 1981, the company was floated on the London Stock Exchange in 1989, and now employs more than 5,000 people in North America and 14,800 people worldwide.</td>
<td>Accounting Contractors CPG Electronics Food and Beverage Transportation</td>
<td>South America North America</td>
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<td><strong>Sage Accpac Extended Enterprise Suite (5.5) by Sage</strong></td>
<td>From small start-ups to larger organizations, Sage software solutions help companies manage their business processes. Formed in 1981, the company was floated on the London Stock Exchange in 1989, and now employs more than 5,000 people in North America and 14,800 people worldwide.</td>
<td>Accounting CPG Electronics Financial Higher Education Distribution</td>
<td>Africa Asia Australasia Europe Middle East South America North America</td>
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<td><strong>SAP Business byDesign (FP2.0) by SAP</strong></td>
<td>Founded in 1972, SAP provides business software applications and services to companies of all sizes in more than 25 industries. The company is listed on several exchanges, including the Frankfurt stock exchange and the New York Stock Exchange (NYSE) under the symbol SAP. SAP employs over 48,500 people in more than 50 countries.</td>
<td>Business Services Electronics Machinery Retail Distribution Metals</td>
<td>Asia Europe North America</td>
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<td><strong>opentaps Open Source ERP (ver. 0.8) by Open Source Strategies</strong></td>
<td>Open Source Strategies, Inc. is a strategic and technology consulting firm specializing in open source software, such as ERP and CRM. Open Source Strategies is one of the core developers of Open For Business and is the principal sponsor of opentaps Open Source ERP and CRM. The company is headquartered in California (US).</td>
<td>Electronics Medical Devices Chemicals Food and Beverage Textile/Apparel Retail Non-profit</td>
<td>Asia Europe South America North America</td>
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In the following sections of this Buyer Guide, TEC is pleased to present a number of case studies that tackle some pressing issues and business pains.

First, we tackle the SaaS model, with some thoughts by a vendor moving into the SaaS space with a vengeance, followed by some examples of how SaaS is working — and indeed, thriving — in the real world.

We follow up with a section devoted to the concerns facing small manufacturers and distributors today. Yes, ERP can help — and the case studies in this section will show you how. But first, some thoughts by a tier-one vendor on how manufacturers and distributors (often the first to feel the pinch in a recession), as well as other small businesses, can weather the storms of uncertain economic times.

We conclude this guide with an issue that’s critical to small businesses everywhere. Small businesses being typically more financially exposed to economic uncertainty than large businesses, they need to be sure they have a solid handle on their financial management processes. We provide a collection of case studies explaining how four small businesses have tackled this problem.
Spotlight on SaaS
In these volatile economic times, customers are looking for the greatest value for their money. As a result, they are routinely demanding lower prices, new product features, expanded services, and faster deliveries. The harsh reality is that they can easily turn to competitors who offer cutthroat deals—and not look back.

By their nature, small-to-midsize companies need to be flexible and nimble and be able to anticipate and adapt to unpredictable economic shocks and market shifts whether around the corner or around the globe. If a small-to-midsize business cannot respond quickly to changing market dynamics, they risk losing business and their very survival is at stake.

Faced with these decisions to invest in the improving business operations, and to better meet the challenges of growth, competition, and regulatory compliance, business owners often put finding a better way to do it on the back burner because they are faced with day-to-day problems. These small-to-midsize business leaders know that the key to successfully managing their businesses is managing growth in a cost-effective way.

So, many may wonder when is the right time to focus the time and resources into IT to make those operational improvements that can directly or indirectly impact profit. They ask themselves: When will the cost of change be worth it? Are there signs that signal when the time is right? When is there potential for greater return on investment (ROI) in operational systems? What are the business conditions that should trigger such a change?

The answer is that the best time to determine when to make changes in IT is when business conditions dictate. It may be when establishing a new location, sales channel, supply chain, or business model; when serving new markets; when faced with sudden sustainable growth, more aggressive competition, more disciplined governance or financial reporting, or more stringent performance goals; when preparing for a recession; or when responding to increasingly higher expectations from customers.

Any of these conditions may be compelling alone, but more than one would be a strong argument for closer examination of the long-term usefulness of the current IT solution. If the legacy IT solution lacks functionality and adaptability to dynamic market conditions, the time is right to consider a change to improve business operations and boost financial performance.

But how to do it?
Two approaches are familiar: purchasing a software package from a vendor or market partner and engaging a systems integrator to select and install software and integrate it with other software in the data center. Both involve purchasing software, paying annual maintenance, implementing and integrating it or having it implemented or integrated, and then running and maintaining it or finding a vendor to manage those tasks.

But a third approach has emerged and has become a market phenomenon: software as a service (SaaS). Widely touted, SaaS allows businesses to acquire, use, and pay for business functionality. Its best-known characteristics are its relative speed to implementation and low up-front costs for acquisition and deployment. As a result, it has been widely adopted for a variety of business and IT functions.

SaaS is typically purchased on a “per-user, per-month” basis with no large initial outlay of capital to license the software. Year-long and even multi-year discounted commitments are often negotiated, which significantly eases the burden for small-to-midsize companies. With SaaS, one does not pay for shelfware as one would with vendor software, but for the seats of users who actually need to use the software in their normal business day.

The most significant benefit of SaaS is that it is a completely scalable business resource that does not require large capital expenses at any time. For example, if the needs of the business should expand significantly, it is simple enough to add licensed seats without any worry about purchasing additional computer hardware, software, or networking—or hiring the additional trained IT technical staff to manage it.
Of course, before making any decision, the advantages of SaaS must be considered in terms of financial value, new technology, and improved operations.

- **Increased Time to Value**—SaaS is quickly installed and more quickly made part of the work process when compared with on-premise software. Often, it is possible to self-provision a trial use, or “try before you buy” a SaaS solution to get a feel for how it looks, feels, and operates. Typically, once licensed, a SaaS purchaser is up and running in a matter of days or weeks, rather than months, as is more frequently the case with traditional vendor software. As a consequence, the SaaS purchaser can begin to realize the business benefits earlier. The payback period is much quicker, and the ROI is significantly better than with vendor software.

- **Lowered Cost**—SaaS does not require large up-front investment, and especially in a recession presents less of a financial hurdle when compared with on-premise software. Small-to-midsize businesses with limited capital budgets and limited IT support will find SaaS is far more suitable to their needs than vendor software.

- **Continued Innovation**—Instead of twice-a-year upgrades, SaaS solutions can be enhanced on a regular and almost continuous basis. Major releases may also appear annually, consolidating all of the enhancements along the way. SaaS users do not have to wonder whether a new release or upgrade will break their system or cause a significant delay in parallel testing prior to switching over into full production. The SaaS provider assumes this responsibility behind the scenes and without intrusiveness.

- **Increased Adaptation**—It has become increasingly easy to adapt SaaS solutions to fit the needs of small-to-midsize businesses. Often SaaS solutions target users with easy-to-use configuration capabilities that allow non-programmers to easily modify their look-and-feel or their business processes. For many small-to-midsize businesses, configuration may be a more appropriate approach, due to its simplicity and lower cost (no programmer required).

- **Reduced Technical Resources**—Possibly one of the least-anticipated SaaS benefits is that it requires significantly fewer technical resources to manage than on-premise software, reducing the strain on IT organizations. For the small-to midsize business this is an enormous advantage. At the same time, by using the expertise of the SaaS provider, which has state-of-the-art data centers and technology at its disposal, the small-to-midsize business can take advantage of the latest in leading-edge technologies and collaboration capabilities that might otherwise be beyond its reach. In this way, the small-to-midsize business can obtain access to next-generation technology without having to manage it.

- **Focus**—Without the distraction of managing the IT function—hardware, software, networks, and technicians—the small-to-midsize company will be freed up to focus on its core competencies, its core value-add. SaaS is a way of outsourcing the onerous aspects of the essential IT systems the small-to-midsize company needs to run its business and manage the challenges of growth, regulation, and competition.
Making the right decision

However, SaaS may not be the answer for every small-to-midsize business. There are several situations that might dictate the choice of a traditional software vendor license.

For example, if regulations require the data the company manages to remain behind the company's firewall, and the SaaS provider cannot make that happen, the owner should definitely rebuild IT capability to improve operations.

Conversely, SaaS should be considered if the company has a limited capital budget, limited IT support, and a distributed workforce in a sales- or service-oriented business because SaaS enables the small-to-midsize company to manage growth, regulatory compliance, and competition without also dealing with a variety of challenges relating to IT.

In the current volatile economic environment in which fast-moving businesses face greater challenges than ever before and staying in business depends on their ability to turn a profit, scale, and adapt quickly and nimbly while, at the same time, building sustainable growth, SaaS is increasingly an answer for such small-to-midsize companies. Their very survival could depend on it.
Recently acquired, TAM Ceramics needs to ramp up quickly with a new IT solution. The firm wanted a solution that was both affordable and able to handle the business’s complexities. As a pre-acquisition user of SAP software, the company is implementing the SAP® Business ByDesign™ solution.

QUICK FACTS

Company
• Name: TAM Ceramics Inc.
• Business context: Recently acquired industrial ceramics specialist needing fast IT ramp-up
• Location: Niagara Falls, New York
• Industry: Chemicals—Industrial ceramics
• Products and services: Specialized ceramic powders for industry
• Revenue: $20 million (USD)
• Employees: 60

Challenges and Opportunities
• Find ideal post-acquisition IT solution to satisfy both current and future business needs
• Satisfy need for affordable solution and ability to handle business complexities

Objectives
• Implement end-to-end IT solution in less than 15 weeks
• Find solution requiring no IT support and maintenance (company lost IT support staff during spin-off)

Why SAP Business ByDesign?
• No IT support and administration necessary
• History as a previous SAP® software user, prior to acquisition
• Avoidance of high transitional service fees

Benefits from SAP Business ByDesign

Key Innovations
• Fast ROI due to rapid solution deployment
• Simplified IT landscape
• Enablement of growth with solution
• Improved decision making due to embedded analytics
• Built-in learning to lower training costs

Deployment Highlight
Planned go-live with processes for customer and supplier relationship management, financials, supply chain management, human resources, and production (internal cost collectors)

Why SAP Business ByDesign is the perfect complement to our company. The remote access system that is hosted and managed by SAP was the resource answer to our small-company business needs and is capable of supporting our business dynamics as we grow.”

George Bilkey, President, TAM Ceramics
TAM Ceramics overview

As a manufacturer of industrial ceramic grains and powders for a variety of markets, including refractory, investment casting, electronic materials, and others, New York-based TAM Ceramics needed a reliable enterprise resource planning (ERP) solution to support critical finance, supply chain, and other everyday operations. In late 2007, TAM was spun off from a larger company, but still had to rely on the parent company’s systems and servers. Unfortunately, the arrangement was costly for TAM and ill-suited to supporting the company’s short and longer-term business goals.

With a commitment to staying focused on its core business—manufacturing and marketing industrial ceramic grains and powders—and improving overall operations, TAM executives began looking for a solution that would enhance supply chain processes and business decision-making, without requiring the implementation of resource-intensive, on-premise solutions. “SAP Business ByDesign is the perfect complement to our company,” says George Bilkey, president of TAM Ceramics. “The remote access system that is hosted and managed by SAP was the resource answer to our small-company business needs and is capable of supporting our business dynamics as we grow.”

Helping drive the company’s success is the power and flexibility of SAP Business ByDesign. According to Bilkey, TAM executives and managers at all levels quickly began using the SAP solution to aid decision-making, improve invoicing and collections, and streamline ordering materials and manufacturing activities. “It requires minimal effort to deploy and begin using SAP Business ByDesign—and the returns are terrific,” says Bilkey. “The reliability of the solution and the support offered by SAP have been excellent. SAP also has a great understanding of what we need to run our business, from standard costing in the supply chain module to the accelerated insights we gain through the finance module.”

At TAM Ceramics, SAP Business ByDesign was implemented in less than 15 weeks, rapidly supporting the company’s business with little or no interruption to operations. Built-in learning in the solution helps keep training costs low and helps ensure faster adoption by TAM business managers. The simplified, scalable IT landscape enables TAM to operate more efficiently, while still supporting opportunities for growth. “Our partnership with SAP has been excellent,” says Bilkey. “SAP is a trusted partner that lets us respond quickly to address our complex, changing business requirements.”

Today, TAM Ceramics is positioned to become a quality leader in the market for ceramic grains and powders, enhancing services to existing customers and expanding to new markets. With its dedicated and highly skilled workforce, low overhead, and outstanding business process automation supported by the SAP Business By Design solution, TAM has the opportunity to reestablish itself as the volume leader in the industry.
NetSuite

Distribution Video & Audio
www.dva.com

The Results
Distribution Video & Audio (DVA), a 20-year old wholesale dealer in closeout DVDs and other entertainment media, turned to NetSuite after a series of other enterprise and off-the-shelf software platforms proved too expensive and inefficient to run the business. DVA first heard about NetSuite in 1999, but tried other options instead, each of which failed to satisfy the company’s needs. Finally in 2007, DVA turned to NetSuite to manage its bicoastal business, providing instant operational clarity. “We didn’t want a software solution that would create resistance from the 40 employees who would be using it,” says Brad Kugler, CEO of DVA. “Our people like NetSuite. They welcomed the change.”

What’s more, with SuitePhone—NetSuite’s compatibility with the Apple iPhone—Kugler’s productivity while traveling has increased significantly.

NetSuite provided immediate benefits in the warehouse as well, where managing the inventory of two locations had been problematic in the past. “We weren’t able to do a company-wide physical inventory for six years, and NetSuite made it possible to finally do that — using its multi-location inventory,” says Kugler. Even now, any salesperson at DVA has a view of the current inventory for sale at any time instead of waiting a week for a report, and they can use saved searches in NetSuite to find the latest products. “Features like that could pay for NetSuite alone,” he says.

DVA’s biggest payoff comes from finally being able to operate as an integrated operation.

“We are a two-location company, in Los Angeles and Tampa, and there was a lot of confusion over purchase orders and inventory, creating too much cross-traffic and forcing us to have a person who did nothing but enter data in a spreadsheet,” Kugler says. “NetSuite has eliminated all of those problems.”

“We went from the most expensive piece of software on the planet [SAP] down to nothing … But we knew that we had to get on a single system, and that’s where NetSuite came in.”

Brad Kugler, CEO, Distribution Video & Audio
When it comes to enterprise software platforms, DVA has seen and done it all. “We went from the most expensive piece of software on the planet down to nothing.” The company was an SAP R/3 customer during its dot-com expansion days, from about 1999 to 2001, but had to drop the platform when maintenance fees became unmanageable.

“We felt like we got SAP R/3 for a good price, but the implementation for our fifteen users at the time was a whole other story,” says Kugler. He explains how it cost about $200,000 for two years, and there was still a huge learning curve for DVA’s users. “SAP was not a product you could customize yourself. It was complicated and rigid. It became an unbelievable monster. And then we got the bill for the year-two license fees. I said ‘QuickBooks—here we come.’”

For the next few years DVA got by on QuickBooks, Excel spreadsheets, and Mail Order Manager for e-commerce but the various systems, with a limited number of licenses, didn’t solve the problem either. “This was the period when we would hear employees calling out ‘I need someone to log out so I can log in.’ We were paying less than we had before on software, but we were definitely paying for it in loss of productivity.”

When the company started growing again, DVA’s accounting department had a difficult time keeping up. “So here we were, a $20 million company with basically manual operations using three or four systems and Excel to manage our business—with none of it integrated,” Kugler says. “Our accountant was on our case and we knew we had to sort it out.”

DVA had worked to implement Great Plains starting in 2003, but $60,000 later, the system was never fully implemented and the company was at a crossroads. “Our staff was in confusion. It was like SAP all over again. With Great Plains and SAP before it, we were always writing custom code, which can go on forever. We were looking at another $30,000 to $40,000 just to get Great Plains up and running, and there were no guarantees,” he says. In addition, Kugler estimates DVA’s cost would have tripled when factoring in a new CRM package and e-commerce system to accompany Great Plains.

“We knew that we had to get on a single system, and that’s where NetSuite finally came into the picture.”
The solution

“We had looked at NetSuite as early as 1999, and were aware the product had improved exponentially since then. This time around it was a choice between NetSuite and custom development,” Kugler says. “Custom development can be great, but what happens when the guy is not around to fix it? You can have the greatest software in the world, but none of that matters if your employees can’t use it.”

NetSuite’s flexible business process management was an excellent fit for DVA with minimal configuration. Kugler estimated the cost of buying and implementing NetSuite about one-third what it would have been for Great Plains + CRM + e-commerce.”And that doesn’t include the third-party software required to tie it all together.”

“The implementation of NetSuite with our business processes went very well—our employees caught on very quickly—and the changes we needed to make in NetSuite were simple things we could do ourselves just by going into the suite’s configuration screens,” Kugler says. “We’re now using NetSuite for just about everything—from our inventory and e-commerce to our sales and e-mail marketing campaigns. The dashboards let me know at a moment’s notice about everything from our bank balances to the profitability on each salesperson. And it can all be customized easily.”

Kugler says DVA does a lot of over-the-phone transactions where they obtain credit card approval at the time of the order, but only charge the card right before it ships. “This was a big issue for Great Plains and needed custom code, but in NetSuite, we just used the checkbox for ‘bill before you fulfill,’” Kugler says.

Another thing that put NetSuite over the top, says Kugler, was the ability to completely access NetSuite from his iPhone. Kugler, who travels extensively, often leaves his laptop behind. “Before a meeting I’ll use my iPhone to pull up the history of that customer. And when I go to bed I often keep my charger close by, so I can wake up in the morning and know immediately how the Web leads and sales went overnight.”

Yet one more benefit of NetSuite is its ability, along with Onsite POS, to be transformed into a point of sale system for the two days of the year when DVA opens its doors to the public and its forty employees change hats and turn their desktop computers into cash registers. Starting at 5 a.m. on those two days, DVA employees welcome over 2,000 consumers eager to get their hands on the latest box office hits that fill pallets and pallets and in their warehouse. “It’s our cutting-edge business software NetSuite that makes those two wonderful but hectic days possible,” says Kugler.
At a Glance

- Company: Distribution Video & Audio is the country’s largest wholesaler of entertainment closeouts

- Location: Palm Harbor, FL and Los Angeles, CA, USA

- Industry: Wholesale/Distribution; Entertainment

- Challenges:
  - Unsuccessful attempt to run back-end on SAP due to complexity and spiraling costs
  - Great Plains was too expensive an alternative, and was missing functionality
  - QuickBooks + Excel + Mail Order Manager were not integrated, hurting employee productivity
  - Multi-location business had poor inventory visibility between warehouses
  - No easy way for executives to access key information when traveling

- Results with NetSuite:
  - Saving over $120,000 on license fees and customization costs required for other solutions
  - Financials, CRM, inventory management and e-commerce all in one system
  - Instant improvement in real-time inventory levels across the company
  - Dashboards providing better insight into sales processes
  - NetSuite’s accessibility from Apple iPhone handheld boosts morale and increasing productivity

Find out more:
contact NetSuite, Inc. at +1 877-NETSUITE
or visit www.netsuite.com

I was shocked that I could pull up my complete NetSuite dashboard on my iPhone, as if it were on my laptop.

Brad Kugler, CEO,
Distribution Video & Audio
The Results

Cartridge World, the $425 million leader in printer cartridge refilling and recycling and the fastest growing franchise in the $80 billion printer cartridge industry, has successfully integrated NetSuite into its operations to oversee hundreds of its 1,650 worldwide franchise locations and manage a rapidly growing business.

After almost 20 years in the business, Cartridge World began growing at an even faster pace in the early 2000s, and consequently chose NetSuite for its integrated CRM, ERP, and e-commerce. The business-to-business (B2B) e-commerce capabilities of NetSuite enable the company’s network of more than 700 North American franchise stores to quickly purchase products from Cartridge World via a NetSuite Web store. “NetSuite has become our conduit to our franchisees,” says Steven L. Yeffa, President, Cartridge World Americas. Cartridge World’s corporate headquarters uses NetSuite extensively to market and communicate with the widespread franchisees as well as to track support issues they have—their questions on everything from invoices to how to refill cartridges.

“The first thing I noticed was the global visibility—NetSuite is certainly enabling the senior management team to have a consistent view of everything going on in our worldwide network,” says Yeffa. “It allows us to think, act, and work as a single company worldwide.” In the process, the company has cut an estimated $200,000 in annual IT and administrative costs as part of its requirements to run an accurate, sustainable business. And NetSuite has supported Cartridge World’s 200 percent collective increase in sales to over 500 storefronts in the United States and more than 1,650 worldwide in 63 countries. Much of that is thanks to NetSuite’s B2B e-commerce capabilities.

“The most important thing is that NetSuite has made it more seamless for the franchisee to come on board, all without a significant amount of customization on NetSuite,” Yeffa says. “That allows us to provide better information and more customer service than anyone else in our industry. We offer a complete package and NetSuite is our backbone to offering that package.”

NetSuite IMPACT

- Saved about $200,000 in annual IT and administrative costs
- B2B e-commerce capabilities supported a 200% increase in sales across 1,650 stores worldwide
- Helped grow sales to $425 million in 2007

“NetSuite allows us to think, act, and work as a single company worldwide.”

Steven L. Yeffa, President, Cartridge World Americas
The challenges

Cartridge World refills empty ink cartridges and remanufactures empty toner cartridges for inkjet printers, laser printers, fax machines, and photocopiers with top-quality, brand-specific ink and toners. The company has more than 500 locations in the United States, with another 300 locations expected soon. Before NetSuite, Cartridge World used QuickBooks for accounting, and managed sales to franchise locations through a non-integrated third-party product. This, coupled with a non-integrated Web store and manual processes in fulfillment, created the potential for costly data entry errors. Most departments used internal and external databases with no clear links between them. The situation was unsustainable for a fast-growing global company trying to stay ahead of business challenges.

Cartridge World deployed its initial inventory system to avert keyboard-heavy processes in order fulfillment, which were a constant source of annoyance and costly errors. But the company came to understand that it had other problems that could not be solved with in-house, on-premise technology, such as the need for business continuity across the widely dispersed organization. “Being global, we have to operate twenty-four hours a day and keep communicating information as different roles grow and encompass more tasks,” Yeffa says.
Cartridge World integrated NetSuite into its worldwide operations to oversee the hundreds of franchise locations and provide real-time information and key metrics for the global organization. Initially, Cartridge World implemented NetSuite primarily as an inventory control tool, without leveraging its integrated accounting and customer tracking capabilities. “We had experience with NetSuite in the past, so although personally I wasn’t involved in the decision to bring NetSuite into Cartridge World, I understood the power of the tools within the program and collectively we decided to re-launch NetSuite internally,” Yeffa says. “We wanted to expand the reach of NetSuite into the full workflow process to all of the operations of our business, not just financial records and inventory.”

NetSuite has given the organization a chance to stay on top of its rapidly growing business opportunities, and has helped Cartridge World avoid major up-front capital commitments or expensive re-engineering fees every time a new region or store comes online. To that end, Cartridge World has rolled up its disparate databases into the internal NetSuite B2B e-commerce system and now operates replenishment for franchise locations through the integrated Web store. The Australian operations have converted to NetSuite for region control, with Europe slated to go live on NetSuite as well.

Among its future initiatives, Cartridge World is looking to fully integrate its in-store point of sale systems with NetSuite, reducing the need for franchisees to place manual replenishment orders.
At a Glance

Company
The world’s fastest-growing ink refilling retailer in the $80 billion printer cartridge industry. The company refills empty ink cartridges and remanufactures empty toner cartridges.

Location
Emeryville, CA

Industry
Wholesale/distribution; franchise; computer hardware; retail

Challenges
• Manual fulfillment processes and a non-integrated Web store caused the potential for costly data entry errors
• Increased brand status created strains on visibility and coordination
• Need to oversee hundreds of franchise locations worldwide
• Large international presence posed expensive demands on disaster recovery and business continuity

Software switched from
QuickBooks; external Web store

Results with NetSuite
• NetSuite provides real-time information and key metrics throughout a global organization
• Franchisees can quickly purchase products via an online Web store
• Cartridge World can effectively market to and communicate with franchisees, and track support issues
• New regions and stores can come online easily without major capital commitments or expensive reengineering fees

“...The most important thing is that NetSuite has made it more seamless for the franchisee to come on board. That allows us to provide better information and more customer service than anyone else in our industry.”

Steven L. Yeffa, President, Cartridge World Americas
Spotlight on Manufacturing and Distribution
Don’t just weather the downturn—actively prepare for a post-crisis world

The economy is slowly recovering. So, will everything just go back to “business as usual”?

You’ve managed to stay afloat through one of toughest economies ever. Now signs are pointing toward a recovery. But will everything just go back to the way it was before the recession? Not likely. The post-downturn economy will redefine how businesses operate and compete.

Welcome to the “new normal”

The current downturn is not simply part of a regular business cycle; it’s part of a “new normal.” Recovery will happen—albeit slowly—but business has fundamentally changed.

Customers have adjusted their attitudes and shifted their expectations—and these changes are becoming entrenched. Doing more with less—cost-cutting, downsizing, improving efficiencies—is here to stay. The competitive landscape has also dramatically shifted. The recession caused a competitive shakeout, and only the strongest have survived. Your competition is leaner, hungrier, and wiser than before.

But uncertain times can be an ideal time for bold companies smart enough to take advantage of opportunity. While others are waiting the recession out, you can get a head start on the competition and watch your sales soar and your costs decrease.

To thrive, not just survive—you need to get ahead of the curve.
Take advantage of shifting market trends and thrive in a post-recession economy:

1. Get a head start—start reinvesting capital now

Most companies will wait for the recession to be declared officially “over” before they begin spending again. Beat the crowd and start planning for strategic capital spending now—on R&D, IT infrastructure, and enterprise resource planning (ERP) systems. It may seem counterintuitive, but if you plan for strategic capital spending in key areas now, you’ll save in the short- and long-term and end up lowering your overall cost structures.

Vendors are more flexible now. Some vendors are offering longer-term agreements, so you can better predict costs.

Explore on-demand solutions; alternative deployments methods can reduce your licensing and hardware infrastructure costs.

The bottom line: Invest now, save later—and beat the crowd.

2. Position yourself to benefit from pent-up customer demand

Improving the customer experience is critical to retaining—and attracting—customers in any economy. Signals pointing to a recovery will help your customers gain confidence. Focus now on building strong relationships with customers, targeting those in growth industries. As the economy begins to turn the corner, you’ll benefit from your customers’ pent-up demand.

Visibility into customer behavior is critical. An integrated CRM solution allows companies to improve the customer experience and more effectively convert leads and prospects into paying customers.

The bottom line: Improve your customers’ experience and watch your top-line grow.

3. Free up cash flow—the true measure of a successful business

Improving the bottom-line improves cash flow. Another way to spur growth is to find creative and effective ways to reduce your costs. Use your ERP solution to get costs under control, without increasing resources or operating costs. More effective supply chain processes reduce waste. Better planning reduces expenses.

The bottom line: Improve bottom-line revenues and free up your cash flow.

4. Do more with less

Now is the time to optimize workflows to be smarter, more efficient, and more productive. When the recovery starts to gather momentum, you’ll already be a lean machine. If you have had to lay off employees or freeze staffing levels, minimize “brain drain” effects by centralizing data and making your internal processes more efficient.

Automating processes, such as reporting, can save time and enable you to do more with less.

The bottom line: Streamline and automate your processes, and do more with less.
5. Tap into business critical information so you can make faster and better decisions

Your data may be your most important competitive tool. To respond to market trends in a more agile way, you have to know how your business is operating on a day-to-day basis.

Make sure you have access to reliable data so you know what to do next and so you can quickly react to shifting economic conditions and seize opportunity. Real-time business intelligence will give you more transparency into your operations and support better decisions.

**The bottom line:** With reliable business critical information, you can quickly react to shifting economic conditions and seize opportunity.

The post-downturn economy will redefine the way you do business and the way companies compete.

Agile companies are not just weathering the downturn, they’re actively preparing for the post-crisis world. Will you be ready?
Pronto Software | Success never tasted so good

Pronto Software delivers custom ERP solution to Chicago’s top frozen pizza company.

When the winning run from a baseball game shattered the front window of their tavern, Mary and Vincent Grittani decided to name it the Home Run Inn. That was 1923. Today, what started as a small neighbourhood bar cooking up homemade pizza, is a market leader in the world’s largest frozen pizza market—Chicago.

Home Run Inn makes and distributes 14 million frozen pizzas a year through a network of 2 food plants and 1 central distribution facility. It has over 1,400 customers from the greater Chicago area in Illinois, through the Milwaukee area in Wisconsin, including Jewel, Dominick’s, and Aldi supermarkets.
Growth through distribution
In 2002, Home Run Inn established a distribution arm in partnership with Power Play distributors, giving them total control of the entire supply chain.

According to IT Director, Kevin Costello, the partnership set the company up for significant expansion and business growth. “Home Run Inn and Power Play distributors established a direct store delivery system that, over the next five years, would enable us to more than double our market share from eight to eighteen per cent,” says Costello.

“This established Home Run Inn as the top-selling brand in the Chicago area, but it also exposed the limitations of our legacy IT system, which was not scalable for what our future needs were becoming,” he says.

Home Run Inn had been using a legacy ERP system to manage production and accounting for a number of years, but according to Costello, it was not scalable and could not support the company’s future growth.

They needed a mobile computing solution where employees could remotely enter a sales order and generate an invoice for the customer straight off the truck which fed directly into the accounting system.

Scalable solution
Home Run Inn launched their search for new ERP software and quickly realised that there were very few off-the-shelf solutions that would meet their needs. “Our requirements were very specific and driven by the needs of the people who were delivering our products,” says Costello.

“We needed a piece of software that was user friendly, cost effective and had all the functionality across many business functions in one package,” he adds.

Three months after their initial meeting with the reseller, PRONTO-Xi, a fully integrated ERP solution was implemented at Home Run Inn.

Home Run Inn
- Chicago’s top-selling frozen pizza brand
- Employs 175 staff across two manufacturing plants and one distribution facility
- Produces 14 million frozen pizzas each year
- Supplies Jewel supermarkets, Dominick’s, and Aldi
The search for a total ERP system

Continuous enhancements

In addition to the financial, manufacturing, distribution, purchasing, and sales features, Home Run Inn was provided with a wireless handheld module tailored to meet their point of sale requirements.

“In addition to providing a total ERP solution, we had designed for us our own hand-held sales order entry module to function off a Microsoft terminal server for one tenth of the cost of a new sales system,” says Costello.

“Just four months after delivering their original solution, we were offered an upgrade to a more sophisticated handheld module with a barcode scanner capability. PRONTO-Xi has continued to evolve into a more sophisticated and powerful solution as time has gone by,” he says.

Real time benefits

According to Costello, the implementation of PRONTO-Xi has seen a significant reduction in data entry errors and far fewer instances in the duplication of work.

“The real time data entry of PRONTO-Xi was ahead of its time. We were no longer finding discrepancies between customer orders and despatched goods,” says Costello.

Using PRONTO-Xi, sales orders are fully integrated with inventory, accounts receivable, general ledger, and customer relationship management functions. This means that when a sales order is updated, each related area is automatically updated.

The reliability and inherent scalability of the system has also seen a reduction in the number of IT support hours, dramatically reducing maintenance costs.

“Unlike our legacy solution, PRONTO-Xi is stable. I no longer need several IT support calls to patch the database,” says Costello.

Key Benefits

- Cost effective, fully-integrated solution
- Inherent scalability to support business growth
- Real time data generation improving accuracy and efficiency
- Lower IT maintenance costs
- Customized to meet specific business requirements

ERP for Small Businesses: A Buyer’s Guide
Vital ERP capabilities underpin growth

Competitive edge

Costello believes PRONTO-Xi has played a significant part in the growth of Home Run Inn over the past five years, providing the business with the tools it needs to compete against larger companies like Kraft Foods and Schwan Foods.

“All of the critical pieces of functionality included in PRONTO-Xi gave us an IT backbone that instantaneously made our company competitive—and helped us double our market share,” he says.

PRONTO-Xi has met every need we have had so far, which has underpinned our growth and made them an exceptional solution provider and business partner, now and in the future,” he adds.

Pronto® Software is a global provider of fully integrated enterprise management systems. With more than 30 years experience, Pronto Software enables over 1,200 businesses to maximize productivity, streamline their supply chains and deliver superior customer service.

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Building products distributor Parksite has been instrumental in marketing some of the most innovative technologies used in the US construction industry. A few of the brands represented include DuPont™ and the full line of Azek® Building Products.

Since its establishment in 1971, Parksite has acquired several new businesses, which has fuelled its growth to a $300 million (USD) company with 350 staff, 12 locations, and 9 distribution warehouses across the Eastern half of the United States. As Parksite expanded its business, it became clear that it needed an integrated technology solution that was flexible and capable of meeting the needs of the construction and remodelling materials industries.
By the end of 2001, after acquiring two new businesses, Parksite was operating with three separate computer systems and it was proving to be unsustainable.

Parksite’s Enterprise Systems Manager, Blake Chadick, said having the systems running concurrently was causing administrative headaches. “One system was so highly customized that it couldn’t work with the other business units. Another would slow down relative to the number of users logged in or tasks in process. Consolidation of financials required a significant manual effort and expertise with Excel. We reached a point where it was taking us up to thirty days to close the books at the end of each financial period,” he said.

“What we really needed was a single, fully integrated solution that could support our business and its growth.”

Managed by a Pronto consultant, an intensive training and rollout program ensued over four months, with PRONTO-Xi going live in January 2003. “We had a great internal Parksite team under the direction of Pronto Software and its reseller steering the process, ensuring we went live on time, on budget, and with 100 percent accuracy,” he said.

Parksite now has 170 active users on PRONTO-Xi. Integrated modules in use include: Accounts Receivable, Accounts Payable, General Ledger, Inventory, Sales, Purchasing, Manufacturing, Advanced Warehousing, and EDI.
Critical need for a robust WMS

A paperless warehouse
With 9 warehouses managing approximately 2 million square feet with 300,000 product orders a year, having a robust warehouse management system (WMS) was critical.

Parksite recently engaged with Pronto Reseller BSA Inc to implement PRONTO-Xi Warehouse Management System (WMS) in its new Chicago warehouse which has helped transform its operations to a paperless environment. Warehouse personnel are also equipped with RF scanners with order/product information directly feeding from and back into PRONTO-Xi.

“Since rolling out the WMS module, we’ve maintained almost 100 percent inventory accuracy and have a much deeper visibility of our stock,” Chadick said.

“Because all the data is integrated and stored in PRONTO-Xi, there’s no duplication in tracking stock and raising purchase orders is more streamlined. The beauty of PRONTO-Xi is that it’s all automated and integrated. Every item and its movement is accounted for,” he said.

Parksite has implemented four facilities to date and plans to roll out WMS across the other five warehouses by year end.

Efficient reporting
PRONTO-Xi Financials has also significantly streamlined the financial reporting process. “We are able to close our financial books on the first day of each month without needing to work long hours or weekends!” Chadick said.

Another benefit of PRONTO-Xi is the built-in report writing templates, which is used widely across the company. “They’re a really useful feature and it’s easy to generate an entire range of reports to suit the varying requirements.”
The ERP system of choice

Real time business data
Parksite also gained real time data on business exceptions through PRONTO-Xi which has reaped significant cost savings for the company according to Chadick. “We’ve started using Alert Intelligence (AI) more often and its been a highly valuable business tool. AI has given us proactive visibility into day-to-day transactions rather than the usual reactive research-and-correct model.”

KEY BENEFITS
- Improved warehouse throughput and mobility
- Greater awareness of business exceptions through real time alerts
- Reduced financial reporting cycle time
- Streamlined trading with customers and suppliers
- Flexibility to customize without hindering future software releases

“Now we get instant e-mail alerts to potential business errors such as failing to withdraw a purchase order when a customer cancels or changes a direct-shipped order. If these errors aren’t flagged, they can end up potentially costing us tens of thousands of dollars over the course of a year,” he said.

Future horizons
Parksite is looking to implement the Advanced Forecasting module and strengthen their supply chain integration by using PRONTO-Xi iSupplyGlobal.

“My company moves fast. I need a business software that is solid, reliable, capable, and responsive. PRONTO-Xi performs as expected, when expected, all without a tremendous amount of overheads. I don’t believe there is much more that can be expected from business software,” Chadick said.

“PRONTO-Xi continues to be our ERP of choice.”

About Pronto Software
Pronto® Software is an international provider of fully integrated enterprise management systems. With more than 30 years of experience, Pronto Software enables over 1,200 customers worldwide to maximize productivity, streamline their supply chains, and deliver superior customer service.

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J. Schmalz GmbH user report

Schmalz and abas Business Software—A long term ERP partnership

Industry
Vacuum Technology

Countries
USA, Germany, France, Spain, Italy, Switzerland, The Netherlands

Project Overview
• International implementation
• Supporting the company’s process-oriented organization
• Integrating eBusiness to reach vendors and customers worldwide

Vacuum technologies simplified with abas ERP

Midsize company J. Schmalz GmbH is a successful provider of vacuum technology. Established in 1910, J. Schmalz GmbH is a leading provider of vacuum technology. abas Business Software (ERP, PPC, MRP, and eBusiness) has been accompanying Schmalz’s success story for over 25 years. Together, Schmalz mastered two reorganizations and entered the international market. abas ERP is not only being used at Schmalz headquarters, but also in France, Italy, Spain, Switzerland, the Netherlands, and the US.
Process oriented organization

Schmalz is a modern, future-oriented company, which develops, produces, and distributes vacuum components, vacuum clamping, vacuum handling, as well as vacuum gripping systems. “We want to enthuse our customers. Thanks to a continuous improvement process in the company and process-oriented organization, we are able to provide high-quality products at an excellent price/performance ratio. This, together with an above-average service and consultation competence and high delivery reliability, inspires our customers,” says CEO Wolfgang Schmalz, and adds, “our company IT, structured around our abas Business Software, supports us enormously in this area. With abas ERP we have a flexible ERP system tailored to exactly our requirements. The software was implemented in 1992. At that time we had about 50 employees, today we employ six times as many just in our headquarters. The evolutionary system approach has perfectly accompanied our expansion over the years. In today’s fast moving world there is just no security that a product can be produced forever. Flexibility, innovation and business spirit are important policies we live up to daily in our company. It is also important to be independent from a single economy and to be present on the most important international markets. abas Business Software fulfills all our special requirements,” adds CEO Schmalz.

Nothing is as constant as change

Werner Fischer, long-term Head of IT at Schmalz, clearly remembers the ERP implementation. “Before 1992 we were using index cards to make postings in the warehouse. The decision was made to implement an ERP system. We were asking ourselves if it would be better to select a product which had already reached its peak or if we should invest in a flexible, modern system. The decision was made in favor of abas Business Software. We have had a good feeling to have found a modern, flexible system which is continuously further developed and grows with our requirements. At that time ERP systems with an extensive function range were already available. But what do I need 100 functions for if I only need 30 and if the functionalities, which are additionally required can only be provided through complex customizing,” summarizes Fischer.

Easy to update

The first reorganization at Schmalz including abas Business Software took place in 1996. A reorganization from a “normal” to an innovative team organization was carried out. Everything was now in the group’s responsibility. According to the motto, ‘Everything is possible’, the IT department will now only be consulted if an adjustment has to be carried out. Two full-time employees support approximately 200 concurrent users at Schmalz headquarters. The Head of IT continues: “Due to the upgrade of abas Business Software our company is in a good position in terms of IT. Every year we import a main upgrade. We generally do not need longer than one weekend. When carrying out a main upgrade for other ERP systems on the market, the application stands still for weeks. If I compare this to ABAS, we have made the right decision.”
“We have a partner we can trust.”

Good software without a good partner does not work

Schmalz and ABAS are midsize companies. The cooperation with ABAS started almost 20 years ago. It has paid off for both companies since Schmalz only wanted to work with one IT provider—who would be as important to them as the other way around. This became apparent when looking at possible influences on further software development. If there is a need for action, Schmalz is able to contact ABAS management, product department, development, and even the software company’s founder quickly. Schmalz is actively participating with the abas ERP user group. The user group communicates online and meets once or twice a year. Employees from the development and support groups of ABAS Software AG are also invited to those meetings. Direct exchange of information is highly efficient and provides all participants with a good orientation of the software’s development.

Long-term ERP partner

A standard business software which has to be exchanged every few years is out of the question for Werner Fischer, “For us, abas ERP is essential. All processes must be represented securely and quickly, today and in the next five years. Requirements of our customers are continually increasing. Through the evolutionary and flexible system approach of abas ERP we have just the right system for this. Looking at the economic situation of our ERP provider, our decision for ABAS at the beginning of the nineties was the right thing to do. Many well-known providers from that time are no longer on the market, but ABAS is continually growing. We really like ABAS’ independence from banks and investors. We have a partner, which we can trust.” Multilingualism is an important factor for Schmalz when it comes to the long-term security of its investment in abas ERP. The vacuum specialist optimizes internal processes beyond borders. Only one click in abas ERP is necessary to create a new product and data will be available in all Schmalz ERP locations worldwide.

Transparent and optimized processes

During the reorganization project, three individual business areas were represented. These business areas are now working in a process organization with individual cost responsibility, which are represented in abas ERP. “Now we have transparent and optimized processes,” says Head of IT, Fischer. In the new structure, a customer order is recorded by sales order processing of the respective area. An availability check as well as scheduling is started automatically. The paperless process is directly sent to the warehouse and will be displayed in outstanding deliveries. Picking takes place in form of labels. By clicking on a single button, abas infosystem creates the packing slip and the invoice will be generated and printed automatically.
Increasing productivity and saving costs
Through reorganization, the error ratio at Schmalz was reduced considerably. Increased transparency and an up to 30 percent reduction of lead times results in cost savings and increased productivity. It is now possible to carry out a target group-specific data export via a multilingual product catalog. This increases efficiency at the vacuum specialist.

High performance workplace
Schmalz uses abas portal integrated in abas Business Software. Portals have become an essential tool of business intelligence and communications. They enable a flexible exchange of information. Companies can specifically use data from various software applications, can link them, connect them to information from the world wide web, and represent them in a structured way for different target groups. Head of IT Fischer said “abas Portal technology enables new possibilities to optimize knowledge management and communication with our customers and vendors. Every employee is able to create an individual workspace with applications and information needed for daily work. Everyone can also actively participate in standard applications such as wikis, online forums, or surveys. The applications integrated into abas ERP via portlets enable entirely new forms of networking.” Schmalz is in a good position for an innovative and successful future.

Schmalz
Schmalz is a family-run company and acts long term. Its philosophy is based on the principle of sustainability and economic success, while respecting environmental and social responsibilities. This ensures independence and the necessary freedom of management. As a company with 450 employees that acts globally and offers innovative products and services, Schmalz provides its customers efficient solutions tailored precisely to their particular applications’ requirements. Schmalz inspires its customers everywhere with production processes that are designed more efficiently through the use of vacuum technology.
ABAS SOFTWARE AG

ABAS is uniquely qualified to successfully implement international projects. No other company has the combination of a unified partner network, strategic orientation, globally enabled software, and international implementation methodology that defines the roadmap to success. ABAS Software AG is a leading provider of cost-effective ERP solutions for midsize manufacturers and distributors. More than 2,200 customers have chosen ABAS as their IT specialist and work successfully with the internationally applicable abas Business Software. ABAS, established in 1980, has now become a global network of companies. ABAS has more than 600 employees and 50 software partners. abas software partners provide a wide range of services including implementation, customization, hardware and network support. ABAS also provides on-site support and ensures short reaction times and high quality services. International partners in Germany, Austria, Switzerland, Hungary, Romania, Bulgaria, Turkey, Czech Republic, Slovak Republic, Poland, Ukraine, Russia, the Netherlands, France, Italy, Spain, Iran, Indonesia, India, Sri Lanka, Malaysia, Singapore, Vietnam, Thailand, China, Hong Kong, Australia, Mexico, and the USA represent the ABAS Software AG throughout the world.
Case Study

User Report: Weinig Group

Industry
Mechanical Engineering

Countries:
Germany, Sweden, Switzerland,
China, USA, France, Brazil,
South Africa, England, Russia,
Singapore, Japan, Australia

Project Overview
• Expand global operations
• Synchronizing production plants worldwide
• Simplify administration and communication

Global and Local Success with abas ERP

Weinig Group is an international technology provider for the solid wood processing and distribution industry. It offers extensive services and system solutions all the way up to ready-to-use production plants. In addition to its headquarter in Germany, Weinig has production locations and sales offices around the world: in Sweden, Switzerland, China, USA, France, Brazil, South Africa, England, Russia, Singapore, Japan, and Australia. Company acquisitions have led to various ERP systems at Weinig Group. To support continued growth, Weinig went on the market looking for a new ERP system for its locations in China, Switzerland, Spain, France, and the USA. abas Business Software met all of Weinig’s requirements and was successfully implemented.
High demands for unique solution

International ERP selection

“Choosing a new ERP system is not an everyday event,” explains Alexander Walter, CIO of the Weinig Group, “in our case the demands were very high.” An important criterion for Weinig was an international implementation methodology. Headquarters wanted a contact partner on the side of the provider who would implement the concepts from headquarters at the country locations where the new software would be used. A smooth, international coordination of the ERP project had to be guaranteed.

Weinig locations were asked to participate in the software selection process. Key users from Yantai (China) evaluated the competing software packages after they were presented. Points were awarded for functionality, user interface, user friendliness, and overall impression of the system.

Choosing abas Business Software

Weinig found what it was looking for in abas Business Software. ABAS is uniquely qualified to successfully implement international projects. No other company has the combination of an unified partner network, strategic orientation, globally enabled software, and international implementation methodology that defines the roadmap to success.

“The international abas project management won us over,” says Walter when explaining the decision. “In international projects, different management levels must be optimally linked to each other. We wanted a central management of projects. Corporate management and project management of both Weinig and ABAS are represented in an executive committee. The entire project management was in my hands.”

Each Weinig location provides a local project manager and the abas software partner provides a project manager on site. Country project managers regularly report to the overall project manager, who in turn reports to the executive committee. Advantage of this procedure: each country’s particularities can be optimally represented in abas ERP. In the case of Yantai, the functionalities available for China also spoke in favor of abas ERP.

ABAS made a good impression in the system presentations in both Germany and China. Ongoing maintenance costs were lower than those of other providers and abas Business Software performed best especially when total costs were calculated for the next five years.
Successful software implementation in multiple countries

The CIO and overall project manager for Weinig summarizes the project as follows: “the highly motivated employees from ABAS gave us the highest level of efficiency and constructive communication during the project. In the process, we even learned a lot about our own company. Project management was fast and professional, and project costs were below budget. I am sure that we would not have been able to achieve such a result with any other provider.”

In China, the local abas Partner, ABAS Business Solutions (PRC) Ltd., is also responsible for Weinig. When asked about benefits achieved, Walter replied, “Weinig China shows a clearly optimized supply chain management in purchasing, sales, and production. Up to now, purchases recorded and managed previously estimated amounts of materials and set the corresponding delivery dates manually. Now, a purchase order suggestion is automatically generated by the system using production data. That speeds up the purchasing process, ensures sufficient warehouse quantities for JIT delivery schedules, and avoids mistakes that arise from calculating manually.”

Global and local success

If Spanish employees identify themselves on the server in Germany when handling a spare part, all actions will then be carried out in Spanish. First, abas ERP identifies the product and checks whether it has already been created. If this is not the case, it will be imported into the system. If the customer accepts the offer, abas ERP transforms it into a sales order and sends the customer a sales order confirmation. Then the packing slip is generated and goods are sent. After creating an invoice based on the packing slip, data is then sent to financial accounting integrated into abas Business Software.

Walter sees the advantages of abas ERP primarily in its continuity: “It is now ensured that data is up-to-date at any point in time. Time saved in creating purchase orders in Spain is considerable. Communication errors no longer occur when transferring data electronically. The best part about it is that language does not make any difference. A company-wide language translation system has been integrated into abas Business Software. Another advantage is that abas Software Partner in Spain, Abas Business Solutions Ibérica, is located near Weinig’s office in Madrid. We therefore did not have to travel very far for things like training and implementation. Next we want to implement abas ERP in France according to the Spanish model. ABAS has a software partner there as well.”

Weinig Group

Weinig Group is an international technology provider for solid wood processing and distribution. Weinig offers extensive services and system solutions, all the way up to ready-to-use production plants. In addition to headquarters in Germany, five other production locations as well as sales branches are located around the globe.
When Mick Sidari was looking to buy Daprano & Company in 2003, he wanted to bring something extra special to the specialty food business. The company was an importer and distributor of premium specialty chocolates, candies, and cakes from all over the world, and Sidari recognized the potential for Daprano to become a major player in the specialty food industry. Armed with an extensive background in premium food products and a passion for quality, Sidari knew that taking Daprano to the next level meant giving it a service facelift.

“The company had some really nice product, and I thought if I could improve the service and freshness of goods, that volume would increase and it would drive the overall revenue,” Sidari says. He knew the place to start was at the base of operations—Daprano needed to streamline the purchasing, invoicing, and selling processes, as well as get control of their delectable inventory.

Daprano carries a long list of elegant treats from across the sugar-coated globe. The Charlotte, North Carolina-based company sources 21 different lines of specialty foods from 6 different countries. Daprano’s sophisticated victuals are on the shelves in high-end stores throughout the country. The company markets through a national network of specialty food brokers, as well as at various specialty-food trade shows annually. Most of the sales take place between the Daprano Web site, third party catalogues, and the brokers themselves.
SYSPRO improves everyday operations

The Challenge

When Sidari bought the company, he was told that one of the challenges was going to be keeping track of inventory and actually ordering the products from the suppliers. “The previous owner had a lot of trouble with the orders—he regularly had a five to seven day lag and was usually carrying a disproportionate amount in back orders,” he says. Immediately, he looked at changing the software, thinking that it must have not been the right fit for the business and was causing some of the drag. Daprano had been using SYSPRO ERP, and Sidari figured that was part the problem. “I take pride in my service,” he declares, “and when I bought the company I wanted to fix it.” So he began looking for a replacement system.

The Solution

However, he continued to use SYSPRO in the meantime, and after about nine months Sidari realized it actually did have the tools to improve the day-to-day operations, such as managing ordering and inventory, and that maybe they weren’t being applied properly in the past. “Very quickly, I realized that SYSPRO could satisfy the business’ needs,” he recalls. “I decided SYSPRO would be the answer for my business, and I decided to stay with it.” Today, the six-person company runs a four-user system on Windows XP.

As opposed to a manufacturer, a distributor like Daprano need not be concerned with the entire manufacturing-specific ERP suite. Rather, says Sidari, they use the software for basic day-to-day functions such as purchase orders, buying, inventory control, invoicing, and tracking sales history.
Total control over inventory

The Results

One of the undisputed features of the specialty food industry, whether a company is a manufacturer or distributor, is that business tends to be seasonal. “It’s usually fourth quarter business,” explains Sidari, “and most of it is gift-giving. Think of it from a consumer’s perspective: if you gave a gift this year, you may not necessarily want to give the same gift the next year. So, over 50 percent of the product offerings change each year to satisfy the consumers’ ever-changing needs.” In this business of irregular sales patterns, having accurate history is critical to a company’s ability to project into the future, as they have one shot—that famed fourth quarter—to bring in the majority of the year’s revenue. SYSPRO helps Daprano manage the seasonal nature of their business by giving them a clear and accurate window into their history, enabling them to properly forecast sales and plan accordingly.

The best offense against such heavily lopsided market share, then, is superior customer service, Sidari’s specialty. He understands that by having total control over and visibility into its inventory, Daprano always knows exactly what it has on hand and what it needs to fulfill expected demand in the upcoming period. With precision like that, he says, “If you place an order on an everyday item, and you place an order before two o’clock, it goes out the same day.”

That kind of customer service has not gone unnoticed in the industry. One of Daprano’s brokers recently pulled Sidari aside to share with him some encouraging feedback. “He told me, ‘Every time I make a sale, one of the selling points to Daprano is service. You can’t believe how good the service is from Daprano!’ That was great to hear,” he says. “Some of our larger customers have shared these same accolades with us. These successes have lead to customer partnerships and business expansion in the last 24 months. It is great to be recognized as a solid supplier,” admits Sidari. “And that all goes back to inventory control, ordering processes, and service, which is where the SYSPRO system helps out.”

About SYSPRO

SYSPRO is a fully integrated enterprise software solution that provides mid-market manufacturers and distributors total control over the planning and management of all facets of business. SYSPRO’s “PragmaVision” approach—pragmatic, yet visionary—reflects the standards of its customers, who demand a unique combination of robust, scalable, yet current technologies. For additional information on SYSPRO, call Stanley Goodrich at +1 714-437-1000 or go to www.syspro.com.
Spotlight on Financials
Corefino Case Study—CHPCC

Corefino Saves Health Services Organization Up to 27 Percent in Annual Accounting Costs

Overview

Founded in 2001, Children’s Hospice and Palliative Care Coalition (CHPCC) is leading the way to bring about lasting, fundamental change in California’s treatment of seriously ill children and their families. Through CHPCC’s direct efforts, the federal government has approved a pediatric hospice eligibility waiver, which is resulting in dramatic policy reform within the state’s pediatric health care system. For the first time in California history, children diagnosed with a life-threatening condition will have access to an innovative model of care that allows them to obtain community-based hospice and palliative services while continuing to receive curative treatment. This is a remarkable achievement and a significant milestone towards ensuring fair and equal access to pediatric palliative care for our state’s children for generations to come.

In addition to its advocacy efforts, CHPCC has several active programs, which provide direct and virtual support to families of children with life-threatening conditions.

CHPCC has experienced rapid growth since its inception, with pilot sites scheduled to roll out in 13 counties statewide, including San Diego, Los Angeles, Fresno, and several in the Bay Area over the next three years.
The founders of Children’s Hospice and Palliative Care Coalition, Lori Butterworth and Devon Dabbs, sought a sophisticated accounting solution that would grow with the business. “We needed to keep close accounting of how our funds are spent and provide detailed reports back to our contributing foundations,” said Dabbs. “Plus, our programs were growing via an e-commerce component on the Web site for selling custom jewelry that carries the words of children, as well as T-shirts and note cards. “We needed to track inventory and share proceeds with our partners,” she said. “We knew that our accounting would become much more complicated than we were prepared to manage.”

CHPCC signed with Corefino and gained Corefino’s “Triple Play” solution combining quality accounting team support, cloud-based accounting services, and Corefino’s Triple-C Platform. This unique platform lets companies connect, correct, and comply using proven best practices, technical resources, and hands-on finance and accounting expertise. Additionally, a dedicated Corefino account manager is available to respond quickly to inquiries and requests.

“Corefino is our accounting edge,” said Dabbs. “The combined solution keeps our financials in line and provides the reporting we need to report to our Board and our community.”

Corefino’s platform is delivered over the Web for a fixed monthly fee, providing financing and accounting expertise, proven best practices, and industry-leading software as a service (SaaS) technology. This SaaS-based model offers many benefits, including cost/time efficiencies, headcount reduction, security, and better integration with existing infrastructure. It also offers a great deal of scalability, which is essential to meet the needs of growing businesses who want to avoid technology issues and mounting costs as they scale out operations.

According to Corefino CEO and Founder Karen Watts, Corefino is helping customers make the “big switch” from the “big 3” ERP applications and stay at their peak of value to corporate management and shareholders. In the case of CHPCC, Corefino also provides scalability and accountability. “We try to stay on top of foundation reports when they’re due, but it’s challenging when other priorities interfere,” said Devon. “Corefino helps us meet the specific needs of a growing non-profit organization.”

The Triple-C Platform
Corefino’s Triple-C Platform includes more than 500 business processes, workflow, and quality assurance checks and reviews that ensure accounting functions are done right the first time. Corefino’s market differentiating Triple-C capabilities provide a highly vetted, factory style framework that allows customers to connect, correct, and comply.

- **Connect:** Leverage the newest 21st century technologies to safely and securely operate accounting solutions in the Internet cloud.
- **Correct:** Ensure a level of excellence via a highly educated and skilled team of accounting industry professionals, within a framework that ensures accuracy.
- **Comply:** Meet the plethora of current and changing financial rules, regulations, and compliances that affect mid-market organizations, helping them minimize financial and legal risk.
Corefino delivers many benefits to CHPCC, including cost-savings and greater productivity. The organization saves an estimated 15-20 hours per week on daily accounting tasks, while benefiting from Corefino’s accounting expertise and freeing up resources to focus on other business-critical activities. Dabbs noted that without Corefino, she would have had to pay an on-site bookkeeper an hourly rate of $20-30 to perform the same functions. This amounts to savings of up to 27 percent annually. “We would have had to spend even more on an accountant to do periodic reporting and reviews,” said Dabbs.

With Corefino on the task, CHPCC is able to maintain compliance with accounting standards, and be ready for contributor audits at a moment’s notice. “Thanks to Corefino, we sailed through a recent audit conducted by one of our largest contributors,” said Dabbs. “We had all the answers.”

Another key benefit is the ability to access accounting information online through Corefino’s Web-based customized portal. “Often, we’re in different locations and need to access accounting data,” said Devon. “We can go online and pull up the information immediately during meetings or presentations. When you’re limited to in-house software, you don’t have that capability.”

Devon is planning to leverage Corefino’s accounting expertise as it grows and expands. “We would advise any company in the health services industry to have a serious look at the economics behind using Corefino’s three part accounting advantage. When there is so much growth in this sector and so many other places to deploy on-site resources, why would you spend them on routine business functions like accounting?”

“We would advise any company in the health services industry to have a serious look at the economics behind using Corefino’s three part accounting advantage. When there is so much growth in this sector and so many other places to deploy on-site resources, why would you spend them on routine business functions like accounting?”

Devon Dabbs,
Co-Founder and Co-Executive Director, CHPCC
Corefino is the “Future of 21st Century Accounting”—a completely outsourced solution for replacing the aging on-premise approach to performing routine financials. Corefino offers a turnkey people/place/platform combination of outsourced accounting experts, outsourced technology, and its Triple-C (Connect-Correct-Comply) best practices/workflow framework. By removing the on-site technology and headcount headaches from mid-market CFOs and controllers, Corefino helps them to become strategic accelerators capable of more meaningful business impact.

Corefino operates on a variety of software as a service (SaaS)-based platforms via monthly subscriptions and has formed strategic partnerships including ADP, EASi, and Intacct. Corefino has vertical market expertise in digital home services, electronic gaming, health services, municipal government, regional corporate offices, alternate energy and clean technology focused companies. Corefino services include reconciliation, GAAP-based financials, plus others that facilitate monthly/quarterly/annual closes, IPO and merger preparation, etc. The company was founded in 2004. The Triple-C platform was completed in 2006 and the company received capitalization in 2008 to challenge the mid-market ERP leaders. Corefino, recognized as a candidate for InformationWeek’s 2009 Top 50 Start-Ups, is based in Sunnyvale, CA, USA. For more information on the company, please see www.corefino.com.

Corefino: The Future of 21st Century Accounting
Case Study

OpSource Improves Global Business Management and Streamlines Revenue Recognition with Intacct

Need for Multi-entity Support and Integration with Salesforce CRM Drives Change to a New Financial Management Solution

OpSource is a Santa Clara, California-based technology firm that helps Software as a Service (SaaS) and web companies more effectively develop and deploy applications. Since it was founded in 2002, OpSource has expanded beyond the U.S. to include operations in the United Kingdom, Ireland and India. Today, in order to ensure ongoing success, the company balances an aggressive growth plan with tight operational budgets.

Like many companies, OpSource has experienced some growing pains. The company was using another SaaS financial application previously, but due to its single-entity set-up the finance team was struggling with how to effectively track and manage its expanding international operations. Furthermore, with no integration between that solution and its Salesforce CRM system, inefficiencies around contract management and the timely payment of invoices were causing additional headaches.

As a SaaS company, OpSource also deals with contracts that require complex revenue recognition schedules. The finance team was managing much of this work in Excel spreadsheets, which required duplicate data entry and increased the risk for errors. This complicated the company’s close and consolidation processes, weakened financial controls and prevented OpSource from having a consolidated view of the company financial statements, forcing them to evaluate other solutions. After a thorough competitive review, OpSource chose Intacct as its new financial management system.

Bryant Tolles, senior director of finance and accounting at OpSource, commented, “The way the previous system worked, we were relying on multiple spreadsheets for tracking individual country budgets, and had a lot of highly manual processes. Intacct offered us a way to automate these processes and improve our financial controls.”

“We also wanted a solution that provided enhanced reporting and global visibility, from a vendor that offered comprehensive support,” added OpSource’s chief financial officer. “Intacct’s reputation for customer satisfaction is terrific and we have found their team to be both knowledgeable and responsive, and their commitment to our success was unparalleled.”
Improved financial controls

Intacct Delivers Effective Multi-entity Management and Improved Revenue Management

Intacct provides OpSource with a complete on-demand financial management system. The multi-entity and multi-currency capabilities ensure OpSource can independently manage finances on a country-by-country basis, and then automatically create a consolidated view of the entire business. The finance team can quickly analyze data along different dimensions, whether by business entity, region or country and evaluate both local and consolidated key performance indicators as needed. In addition, by having all entities in one system they can automate intercompany transactions and eliminate the need to manually reconcile intercompany balances—reducing both time and errors.

Since deploying Intacct, OpSource has also gained improved financial controls and better support for its revenue recognition models. Instead of having to manage revenue recognition using complicated spreadsheets, Intacct’s contract and revenue management features automate the management of deferred revenue and revenue recognition and optimize contract renewals. The system includes built-in reports to help the finance team quickly and easily forecast deferred, recognized and renewal revenue so they can have instant access to reliable, accurate business forecasts.

"Intacct provides all the functionality a growing company like OpSource needs to efficiently manage our global financials. Our close and consolidation process across our four entities now takes only days versus weeks," said OpSource’s CFO. "In addition, Intacct’s advanced contract management functionality allows us to more easily and accurately recognize and forecast revenues. All this has freed up time to allow the finance team to analyze data like we never could before."

OpSource Challenges

• Needed support for multi-entity and multi-currency management
• Wanted improved revenue recognition processes and better reporting
• Looking to integrate its CRM and financial applications to improve operations

Previous Solution

• Mid-sized on-demand system

Results with Intacct

• Global business management capabilities support financial operations in four locations worldwide
• Automated revenue recognition process improves efficiency
• Tight integration between Intacct and Salesforce CRM streamlines processes
• Significantly shortened close and consolidation process from weeks to just days
• Enhanced reporting and analytics capabilities improve business insight
Integrating Front and Back-office Systems Improves Efficiency; Enhanced Reporting Increases Business Visibility

OpSource has extended Intacct beyond the finance team to enable almost 200 employees to create and submit expense reports. They also took advantage of Intacct’s pre-built integration to Salesforce CRM. The integration allows account managers in the field to have instant access to customers’ contract and payment status, eliminates a significant amount of duplicate data entry and ensures the Sales and Finance teams are always working with the same data.

OpSource is also benefiting from Intacct’s robust reporting capabilities to gain added business visibility. Intacct enables the finance team to quickly view all the information they need to do their jobs, without writing any code or learning any new reporting or business intelligence tools. Ad-hoc reporting capabilities also allow OpSource to generate specific financial reports tailored to their business needs. Moving forward, OpSource plans to expand their use of dashboards to provide the management team with a quick, visual snapshot of business performance.

“In our first few months of use, Intacct is already helping us to more effectively manage our financial operations, and I see the potential for increasing our benefits even further,” added Bryant Tolles. “I’ve been able to create custom reports within Intacct that deliver greater insight into our business, and I’m now working on dashboards that will give company management an instant view into expected revenues and cash flow.”

Intacct provides OpSource with a flexible financial system that enables them to gain better oversight of their business as the company grows. By automating previously manual processes, Intacct is also helping OpSource to become more efficient and, ultimately, more agile as a business.

“The improvement Intacct offers us in visibility and automation makes it possible for us to improve the way we run the entire company; but they also improve our effectiveness,” commented OpSource’s CFO. “We believe we’ll be able to grow much larger with the same finance staff we have in place and avoid hiring two to three full-time people over the next 18 to 24 months, so the hard dollar ROI is very compelling.”

“Intacct provides all the functionality a growing company like OpSource needs to efficiently manage our global financials. Our close and consolidation process across our four entities now takes only days versus weeks.”

CFO
OpSource
About Intacct

Intacct is the market and technology leader in on-demand financial management and accounting applications for businesses and CPA firms. Bringing cloud computing to finance and accounting, Intacct’s award-winning applications are the preferred financial applications for AICPA business solutions. Intacct applications are used by thousands of businesses, from startups to public companies, and are designed to improve company performance and make finance more productive. The Intacct system includes accounting, contract management, revenue recognition, inventory, purchasing, vendor management, financial consolidation, and financial reporting applications, all delivered over the Internet via software as a service (SaaS).

If you would like to learn more about Intacct, please visit www.intacct.com or call 877-437-7765 to speak to a representative today.
Case Study

Sage Accpac Extended Enterprise Suite Enables Island Lake Resort to Grow Despite Stiff Competition

The Island Lake Resort Group offers wilderness adventures, such as Cat skiing and heliskiing in the Canadian Rockies. Founded 20 years ago by three locals, the Group now boasts 230 employees and five companies that include restaurants and three resorts: Island Lake Lodge, Powder Cowboy, and Mica Heliskiing.

“Over the past ten years,” said Darryn Shewchuk, director of sales and marketing, “The number of back country adventure operations in the Canadian Rockies—which comprise more than 90% of the worldwide market—has tripled. Yet skier days have remained constant. This means the environment is much more competitive.” To grow, the Group wanted an enterprise-wide CRM system that would enable it to improve its marketing. In addition, after many years successfully using Simply Accounting by Sage, the Group wanted to move to an enterprise-class accounting system that could accommodate its expanding operations.

“We chose Sage Accpac ERP and SageCRM,” explained Shewchuk, “because they allowed us to not only integrate accounting and CRM data but also data from our third-party point-of-sale and reservation systems. This gives us complete information about customers and prospects for all of our companies. These applications are Web based, which is important because we travel constantly and need access. They’re scalable, enterprise products that can handle our growth. And they’re fully customizable.”
**Customer**
Island Lake Resort

**Industry**
Hospitality and Restaurant

**Location**
British Columbia, Canada

**Number of Locations**
3

**Number of Employees**
230

**System**
Sage Accpac ERP
SageCRM

**Challenge**
Over the past ten years, competition in back country adventure skiing operations has tripled while the number of skiers has remained constant. Island Lake Resort Group needed to market more effectively to remain profitable—and grow.

**Solution**
Sage Accpac Extended Enterprise Suite provides SageCRM to manage comprehensive customer and prospect details, enabling more effective marketing of its tours; Sage Accpac ERP to manage growth; as well as POS and reservations systems.

**Results**
Sage Accpac has given the Group a huge competitive advantage. Bookings have increased by as much as 50% year-over-year since implementation.

The move from Simply Accounting to Sage Accpac has enabled the Group to manage rapid growth. The Sage Accpac database is powerful enough to handle all of the Group’s customer records. Because all of the applications share data, duplicate data entry has been eliminated. Accounting data from all the resorts and restaurants can now be consolidated or used to create detailed reports and financial statements for each company and department. Said Bonnie Pelletier, controller, “Because we no longer create these reports manually, we’ve saved two or three days each month.”

The Web-based implementation of Sage Accpac also enables the accounting department to better meet the needs of different businesses. For example, said Pelletier, “Because I’m the only one qualified to oversee accounting, we previously had to do all our accounting in one physical location. However, one operation wanted to pay its bills onsite. Now, Sage Accpac makes all of this information available through the Web so I can oversee that operation online.”
Increased business at competition’s expense

SageCRM enables the Group to maintain profitability and grow quickly despite intense competition.

As with airline tickets, seats on a Cat skiing or heliskiing tour are perishable. For example, on any given day, a heliskiing tour can accommodate four groups of four people. If one seat is empty, that helicopter loses 25% of its revenue—and all of its profit. Therefore it is essential for the company to keep tours full. The Group uses SageCRM to manage this effort.

The first step is finding the limited pool of people interested in Cat skiing or heliskiing, which costs $600 to $2,000 per day. The obvious place to start is existing customers. “However,” said Shewchuk, “Previously, we had no database of customers that everyone could access. Information about existing customers was sitting on waiver forms in boxes and we did nothing proactive with them. I used a personal CRM product to keep track of guests in one of our operations, but we couldn’t expand it to multiple users and multiple locations. Now we have a complete database everyone can access that contains 6,000 existing and 25,000 potential customers.”

For the newer Powder Cowboy and Mica Heliguides operations, said Shewchuk, “We didn’t have existing customers so we had to be proactive about getting new ones. We ran contests to get the names and contact information of people interested in Cat skiing and heliskiing, then used SageCRM to store these leads in our database.”

With this customer and prospect database in place, the group now uses SageCRM to manage e-mail marketing campaigns to keep seats full. Explained Shewchuk, “SageCRM allows us to contact a huge number of people likely to be interested and offer them a last-minute discount, which is better than having an empty seat. We can also slice and dice our customer data to create targeted marketing campaigns that appeal to different demographics.”

When these campaigns are completed, SageCRM tracks results and can be used to set up tasks to ensure that nothing falls through the cracks. Said Shewchuk, “Previously, we had no follow through. SageCRM allows us to be more structured in organizing and managing our campaigns.”

When guests call in to make a reservation, clerks using the reservation system make use of the common database to better serve them. For example, they can see whether the guests have skied before or are regular customers—not to mention whether they have a balance owing.

The use of SageCRM has helped increase business substantially at the expense of the competition. From 2006 to 2007, bookings increased nearly 10% for Island Lake Resort, which was already fully booked most of the time; 30% for Powder Cowboy; and 50% for Mica Heliskiing. Plus, business is on pace to continue this trend in the coming season. “Using SageCRM has given us a huge competitive advantage,” said Shewchuk.
About Sage North America

Sage North America is part of The Sage Group plc, a leading global supplier of business management software and services. Sage North America employs more than 4,100 people and supports nearly 2.9 million small and medium-size business customers. The Sage Group plc, formed in 1981, was floated on the London Stock Exchange in 1989 and now employs 14,500 people and supports 5.8 million customers worldwide. For more information, please visit the Web site at www.sagenorthamerica.com.

If you would like to learn more about Sage Accpac, please visit www.sageaccpac.com or call 1-866-520-0538 to speak with a representative today.
Case Study

Sage MAS 90 is the Perfect Profile for Digital Signal Corporation

**Challenge**
Digital Signal Corporation’s entry-level accounting software lacked job costing functionality and the robust accounting and financial reporting features required by this government contractor.

**Solution**
The Sage MAS 90 suite of modules delivers broad functionality, powerful features, and a strong accounting foundation to Digital Signal Corporation.

**Results**
Comprehensive job costing data allows the company to better estimate future jobs. Time spent invoicing is reduced from one full day to just 30 minutes. Accurate invoicing and a strong audit trail make the company eligible to receive electronic payments from the government, improving cash flow.

Digital Signal Corporation is a worldwide leader in the research and development of three-dimensional facial recognition systems, a sophisticated and top-secret technology currently being developed for the Department of Defense and other federal agencies. Just six years old, Digital Signal Corporation has grown rapidly, and the growth trend is expected to continue as commercial uses for its technology are uncovered. To safeguard its data and ensure its accounting systems meet governmental requirements, Digital Signal Corporation places its trust in Sage MAS 90 ERP.

“Sage MAS 90 is powerful and flexible. It is fabulous business management software,” says Patricia Stephan, controller at Digital Signal Corporation. “It has completely transformed the way we operate.”
Meeting complex requirements

**Customer:**
Digital Signal Corporation

**Industry:**
Technology

**Location:**
Alexandria, Virginia
Number of Locations: 1
Number of Employees: 22

**System:**
Sage MAS 90
Sage TimeSheet
SageCRM

**Zero In On a Solution**

The company started out using QuickBooks, but as it grew, Stephan says the entry-level software simply did not have the depth and breadth Digital Signal Corporation required. “We passed the DCAA (Defense Contract Audit Agency) audit by the skin of our teeth,” she recalls. “And that was only because I was able to produce paper records to supplement what we couldn’t get from QuickBooks.”

Digital Signal Corporation needed a robust job costing solution capable of tracking the labor and material expenses involved in its development projects. In addition, stalwart financial reporting capabilities were required to enable the company to produce the complex and varied financial statements required by management and the federal government.

Stephan had used Sage MAS 90 extensively in other positions, and recommended the company consider it. In addition, the company reviewed Deltek GCS Premier®, software designed specifically for government contractors. “Sage MAS 90 has it all, right out of the box,” says Stephan. “We were worried Deltek might require too much customization. The business partner representing Sage MAS 90 had experience setting up the Job Cost module for government contractors. When they showed us precisely how it could work for us, we were sold.”
Pinpoint Project Costs
Labor hours, burden, and overhead for every project are tracked within the Job Cost module. “We’re at the leading edge of this industry,” explains Stephan, “so all the data we can gather about the costs associated with our research and development projects is extremely valuable. Using Job Cost we can compare our budgets to actual costs in each category. Seeing where we exceeded budget or where we’ve saved helps us more accurately quote the next project.”

Digital Signal Corporation uses Sage TimeSheet, an integrated time and expense tracking solution that is both powerful and easy-to use. Employees enter their time directly into Sage TimeSheet. After the time entries are reviewed and approved, those entries flow into the Payroll and Job Cost modules, and in the case of expense entries, into the Accounts Payable module — eliminating the need for duplicate data entry by payroll and administrative staff. “Using Sage TimeSheet and the Job Cost module together, we get an accurate breakdown of labor costs by project and by task,” explains Stephan. “Not only does that give us better and more reliable job costing data, it saves a significant amount of administrative time otherwise spent handling and entering paper time sheets.”

Save Time and Improve Cash Flow
It used to take Stephan one full day to produce a single invoice, as she assembled paper time sheets for the month and entered material and labor costs into spreadsheets to calculate the final billing amount. “Invoicing now takes me about a half an hour,” says Stephan. “Not only is it faster, but it’s much more accurate.”

In fact, Digital Signal Corporation’s accurate invoicing and availability of a complete electronic financial audit trail have earned it the right to receive funds electronically from its government customers. “It’s a great boost to our cash flow,” notes Stephan, “and it wasn’t possible before Sage MAS 90.”
Target Purchasing Efficiencies
Sage MAS 90 is also streamlining the purchasing tasks at Digital Signal Corporation. Parts and materials ordered specifically for a project are coded with the job number and expensed immediately upon receipt. As additional items are taken from inventory in support of a project, those items can be issued from the Inventory Management module to the Job Cost module. Staff uses the Item Memo feature to store notes and details about items, including how the item was used and its overall performance. “We’ve simply got better, more useful, and more readily available data,” says Stephan.

The company is also able to monitor its vendors’ performance using the software. By comparing product lead times to actual receipt dates, Digital Signal Corporation can identify those vendors who deliver on their promises, helping to ensure its own projects remain on schedule.

Plan for Growth
Digital Signal Corporation is currently implementing SageCRM, which will be used to store customer contact information and the details of its contract with those customers. SageCRM integrates with Sage MAS 90, allowing customer details to flow from one system to the other, ensuring both are always up to date. “As the company moves from research to full production, we expect SageCRM to be of great value as a single location for tracking the details of our customer relationships. We’ve assembled an integrated solution that meets all of our business needs,” Stephan concludes.
About Sage North America

Sage North America is part of The Sage Group plc, a leading global supplier of business management software and services. Sage North America employs more than 4,100 people and supports nearly 2.9 million small and medium-size business customers. The Sage Group plc, formed in 1981, was floated on the London Stock Exchange in 1989 and now employs 14,500 people and supports 5.8 million customers worldwide. For more information, please visit the Web site at www.sagenorthamerica.com.

If you would like to learn more about Sage MAS 90, please visit www.sagemas.com or call 1-800-854-3415 to speak with a representative today.
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