

Skin Care Company Switches to Acumatica from Sage, Gains Deeper Insight Into Customers and Prospects

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– Jodi Anstandig, Finance Director, Biopelle

OVERVIEW

Biopelle is an innovative skin care company in aesthetic medicine, and sells rejuvenation and wellness skin care products to doctors, medical clinics and spas. When Sage notified Biopelle it would soon discontinue its support for SagePro 100, its legacy financial software, Biopelle's Director of Finance saw an opportunity to integrate several operational software programs that didn't work together, and purchase an ERP system to provide deeper insight into Biopelle's customers and prospects.

SITUATION

Founded in 2005 as a division of Ferndale Pharma Group Inc., Biopelle offers a portfolio of skin care technologies including growth factors, retinols, brighteners, exfoliators, and customizable skin care programs.

Operationally, company executives needed updated systems with improved methods for inventory planning. Biopelle had used SagePro 100 for five years, but production planning and forecasting in Sage was manual and tedious. Finance Director Jodi Anstandig would take data from Sage, enter it manually into Excel, and then create reports for the Operations Director. Creating a bill of materials manually was "a nightmare," Anstandig said, because not only did Sage pull inventory from the wrong places, but it also created negative balances.

The outside sales team utilized Act!, which in the field was slow to access data. Without integration to the ERP data, the reps lacked valuable information when selling. To get needed information, reps had to contact home office and request updates on their orders. In addition, multiple reports were created in Excel and Adobe and emailed on a daily basis to keep the reps current.

For a company whose philosophy includes offering superior customer service, Anstandig knew they could operate more efficiently. When Sage informed Biopelle that they would no longer be supporting SagePro 100, she put together a dream list of features and operations she wanted to improve, and began looking for an ERP to fit all of Biopelle's needs.

"I was looking for something that would increase efficiency and improve our capabilities with as many bells and whistles possible," she said. Her biggest challenge was finding an ERP system that could handle Biopelle's complex sales order process system and financial practices.

SOLUTION

Although other Ferndale Pharma Group divisions used QAD MFG/PRO, Anstandig eliminated it from consideration as it could not accommodate Biopelle's operating processes. Anstandig evaluated Blue Link, Minotaur Software, and Acumatica.



COMPANY

- **Location:** Ferndale, MI
- **Industry:** Healthcare, skin care products

KEY RESULTS

- Integration of disparate business systems and financial software
- Web-based access provides vital information for mobile salesforce
- Increased visibility into financial data
- Unlimited user business model means more employees can find the information they need—on their own
- Integrated inventory forecasting and planning eliminates errors and saves time
- Sub account flexibility enables deeper customer analysis

"I chose Acumatica because I knew it could handle our complexities," she said. "Acumatica offered a lot more customization than the other packages. It was easy to get around from one screen to another, and I felt like it would take us into the twenty-first century."

In late 2013, Biopelle purchased Acumatica's Financial Management, Customer Management and Distribution Management Suites on a perpetual license, hosted on-premises. Acumatica Partner SBS Group helped Biopelle set up the software.

IMPLEMENTATION

Anstandig reports that setting up the software was a large undertaking, but worth it. "One of the great things about Acumatica is that you can set up the modules in so many different ways; everyone can use it in exactly the way that they need."

The team at SBS Group was knowledgeable and experienced. "Despite all the intricacies of our business and detailed data needs, our Acumatica partner has been able to resolve every issue," Anstandig said.

BENEFITS

Anstandig used to get frantic calls from the outside sales team asking for access to vital information to help close deals. "The sales reps were never allowed into our ERP system, but now they can connect at any time. They can access data within the permission levels they have been granted," Anstandig said. "They can see which customers ordered in the past and get reports. With access to CRM, they can see notes and activities entered by the customer service team. There is improved communication between our reps and the inside team, which we didn't have before."

Biopelle had previously used Act! for their CRM, but Acumatica eliminated that need and its ongoing licenses for 15 seats. Acumatica also made the accounting and customer service teams more productive because they are no longer duplicating their work. The field reps are more independent and self-sufficient, she said. Acumatica's unlimited user pricing model allows her to ramp up her sales force or operations without incurring additional fees.

Acumatica's sub account structure allows Anstandig to populate fields with custom information and gain insights she couldn't before. "Now I can create fields that are reportable and informative. The attribute section of Acumatica is terrific," she said.

With SagePro 100, she was restricted to using existing fields, leaving her to determine how she wanted to use a field on a daily basis, and then inform employees how that field was to be used. "With Acumatica, we can create an attribute on-the-fly and pull up what we want. The attribute can be a text, a check box, a dropdown list—anything—and I can link it to other tables and generate reports."

"Now I'm able to work with data right and left," Anstandig said. "I can create reports knowing which customer ordered which item during which time with what special."

"I'm able to drill down and get information in ways I never could before," she added. "I like that the GL doesn't come with canned reports. I like that I can create what I want and get the information with just a push of a button."

Anstandig also previewed Acumatica 5.0, the next major upgrade of the product, and liked the potential to create customer portals and take advantage of new dashboards and vendor price worksheets—all without having to learn a radically different navigation system.

"In the past, we never allowed customers to access our system, but we were planning to create a website where they could place orders. Now I'm considering how I can use the new customer portal feature to extend our existing ERP system without having to build an entirely separate website," Anstandig said. "I really like how Acumatica is serious about giving its customers new and improved features."

Acumatica has become a vital tool in Biopelle's growth. "With the sheer capability of getting our sales reps online and giving them access to customer information through the CRM, Acumatica is allowing my business to grow."