

Acumatica Implemented in Just 10 days, Helps Caswell Inc. Run Stores Efficiently

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– Lance Caswell, President, Caswell, Inc.

OVERVIEW

For the past 15 years, Lance Caswell ran his family’s small online retail companies using Everest Software, a business management software package that was expensive, difficult to upgrade and whose updates led to several days of outages. When Caswell decided not to renew his software license, he had just a few weeks to find a new solution. Caswell decided to implement Acumatica’s ERP—a move he did in just four weeks—which made his business much more efficient.

SITUATION

Lance Caswell’s father has a good eye and is quick to seize opportunities when they present themselves. When the former Brit learned about a do-it-yourself kit for nickel plating, he realized gear heads and antique bike enthusiasts would jump at the chance to restore old cars and bikes themselves rather than hiring others to restore nickel, brass and other metal plating. The Caswells set up shop in their home, only moving to a manufacturing facility near Rochester, NY when chemicals and shelving that filled the living room blocked the television, says Lance Caswell, president.

Over past 20 years, the company added an eclectic mix of automotive-related accessories, including a separate company that sells British-sized fasteners, tools and other parts, and added a third company that sells long tail motors for boats used by fishermen and hunters to traverse shallow waters. For the past 13 years or so, Caswell Inc. relied on Everest to run the accounting side of the business, a software package that caused the firm major problems whenever an update was issued.

“The software was okay but I was batch importing orders from our website with a custom program I wrote,” Caswell said. “Everest was older software and updates typically took us down two to three days while I tried to fix things. It was a nightmare.” When it came time to renew the software license, Caswell elected to move to another system to eliminate the upgrade headaches and because the multicompany add-on product wasn’t going to be supported.

“That was the ultimate breaking point,” he said. “It basically rendered the whole thing useless for us.” At the time, Caswell was running the business as three separate online stores; one for the plating kits and accessories, one for the English-sized tools and the third for the long-tail motors.

Caswell first decided to move back to QuickBooks, a program they used earlier in the company’s history, but after trying to set it up for a couple of months and continuously repairing crashes, he scrapped those plans.

Noticing that he was the recipient of an email campaign by Acumatica, he contacted the company and was connected with Gregg Mercede of Cloud 9 ERP Solutions, an Acumatica Gold Certified Partner based in Stamford, CT.



COMPANY

- **Location:** Headquartered in Lyons, NY
- **Industry:** Online retailer

SOLUTION

- Acumatica Financial Management
- Acumatica Distribution Management

KEY RESULTS

- Reduced invoicing from a full day’s work every day to one hour a day
- Eliminated days of downtime caused by software upgrades
- Reduced need for IT support by 10 hours a month
- Gained insight into inventory
- Gained agile platform for growth of several companies without adding accounting headcount

"When I talked to Gregg I told him I only had four weeks until my Everest license expired and asked him if I could even get up Acumatica up and running in that time," Caswell said. "I knew most implementations took several months or more depending upon a company's circumstances, so I wasn't surprised when he hesitated at first."

SOLUTION

Rapid implementation

"Gregg asked if I would be okay with getting the ability to process orders and invoicing up in that time with the rest coming later and I said absolutely," Caswell said.

Despite being a one-man IT department, president of the company and one of just eight employees, Caswell devoted much of his time to delivering everything Mercede needed. He quickly learned how to import customers, the company's 5,000 SKUs, and vendors and set up credit card processes, shipping processes and starting balances.

"I was able to do a lot of that work myself because Acumatica's import and export tools are easy to use and so powerful," said Caswell. "I was on the phone sometimes with Gregg until 11 at night talking about whatever I was having trouble with, but I was up and running and ready to go when Gregg came on site."

Caswell went live in November, 2014 in just ten days, and Mercede gives Caswell a lot of credit for making that happen. "Lance was very dedicated, smart and knew his data inside and out," Mercede said. "He was a very good student and turned in his deliverables on time, which made our job a lot easier."

Caswell had equal high praise for Cloud 9 ERP Solutions. "Gregg's team knew Everest and Magento," he said. "Without that knowledge, I don't think we could have implemented Acumatica this fast."

BENEFITS

Running online stores more efficiently

Caswell Inc. is much more efficient due to many automatic processes, Caswell said. The biggest time savings has come from not having to print out separate orders, invoices and receipts from Magento, the company's online store, input them into Everest, connect them to shipping invoices and tracking numbers and then upload them back into Magento. "If we had 50 orders a day, it took one person all day to process," Caswell said. "Now, because everything is integrated and batched, the whole invoicing process takes only an hour as opposed to all day, which freed up a whole staff member."

Improved customer communications

Because tracking numbers were only generated at the end of each day, customers didn't know until the next day that their order was shipped and on its way. When busy employees frequently forgot to process the tracking numbers at night, someone had to spend an hour regenerating the tracking numbers and uploading them into Magento. That's because when an additional order came in the next day, the previous day's upload would be gone.

"Now everything is downloaded automatically and tracking numbers get uploaded every hour, which allows customers to stay informed about their order as it happens," Caswell said.

Improved inventory

Acumatica gave Caswell automated purchasing, which the company didn't have before. "Now I am able to go into one screen and see all the purchase orders," he said. "This helps us be a lot more efficient because we can see what is in stock and what we might need. Before, we were running out of stuff all day because we couldn't see what was in stock or what we were out of."

Eliminated IT headaches

Caswell estimates he's regained some 10 hours a month he previously spent troubleshooting the company's technology problems. "Acumatica relieves me of so much IT responsibility, which is a huge worry off my mind and time savings for me," he said. "As a small business, we really can't afford to hire a full time IT guy, so that either fell on my shoulders or we would have to pay someone a lot of money to troubleshoot problems for us."

Because Acumatica offers a number of hosting options including running in the cloud, Caswell can view operations from home whenever he wants. "It's incredibly nice to call up something from home and see it instantly," he said. Before, he would have to log into a remote terminal and hope a connection worked and could be maintained for a period of time.

With the main business up and running, Caswell is now adding the British Tools part of the operation to Acumatica as well as the company's Mud Skipper motor division. Acumatica allows firms to run multiple companies from the same software instance—this will help all three companies be more efficient and give them a platform for future growth. Caswell says the firm, with revenues about \$4 million, is expected to grow more than 15 percent a year thanks to the fast growing Mud Skipper division, and Acumatica.

"Acumatica is incredibly simply to use, and it's faster as well," Caswell said. "Even though we were running Everest on premises, Acumatica is faster. The automation, the data import features and even batch change processes take minutes. Acumatica is reliable, and there's no IT overhead."