

## Acumatica Integrates Specialized Produce Sales Software, Saves Produce Broker Time and Money



*“Acumatica has completely changed our business. I just look in the accounting and all the information from the sales is in there... For our business that’s a big deal.”*

– Ronald Krieger, CFO, Consolidated West Distributing

### OVERVIEW

Founded in 2001, Consolidated West could not link its sales management software with its accounting software. In 2016 the company switched from QuickBooks to Acumatica and achieved the needed integration, gaining significant time-savings from eliminating double data entry.

### SITUATION

Consolidated West began operating in 2001. The company’s CFO, Ron Krieger, says they continually had challenges linking their specialized sales software with their accounting software.

Because they couldn’t connect the two systems, Mr. Krieger says, he always had to do double-data entry: “We would have to take all the information and then redo it again in QuickBooks.” He adds, “It was a lot of number-crunching for me, which I wasn’t happy about.”

After 10 years the CFO says he grew frustrated with QuickBooks’ limitations, especially as the company’s operations grew: “It’s not applicable to a sophisticated business like ours.”

Mr. Krieger says Consolidated West found new financial software, which they tried to use but found it so challenging that it reduced some staff to tears. He reports, “We spent quite a bit of money trying it, but it was antiquated and didn’t meet our needs, and they could never get it to work.

That was a real problem. It was basically used for growers, for people who plant the products, not for brokers like ourselves.”

At that point, Mr. Krieger says, “I was extremely disappointed, because now I had to go back to my old system.” But then he heard from a friend who’s a CPA, he says, “He was looking at Acumatica and said you might want to talk with these people. I said if we could use our sales program, and integrate it with Acumatica, that would really be the best way to go.”

### SOLUTION

Consolidated West CFO Krieger says before finding Acumatica he had looked at other ERP options, but they didn’t address the firm’s needs. “None was flexible enough for us,” he says. “They wouldn’t make changes. Acumatica seems to try to make changes where it’s necessary. That was the key thing.”

The CEO of the firm that had developed the produce sales software, Frank Marafino of Advanced Technology Innovations (ATI), also considered Acumatica the best option to integrate with their software. He reports, “The underlying tools and development environment in Acumatica seemed very powerful. That’s what led me to it.”

### COMPANY

- **Location:** Commerce, CA (Los Angeles area)
- **Industry:** Produce broker, specializing in apples, pears and cherries

### KEY RESULTS

- Integrated system allows automatic flow of financial data, cutting data-entry in half
- Enhanced financial reporting meets internal and external requirements
- Remote access improves monitoring of finances and productivity
- License for unlimited users allows business to grow with no additional per-user cost

Cliff Hall, President of Cortekx, the Acumatica Gold Certified Partner that ended up assisting Consolidated West with their Acumatica implementation says: "When we first met with Ron to help him address his challenges and implement his vision, it quickly became evident that integrating Acumatica with ATI's Produce Broker Pro was going to be a solid solution for him to move in the direction he intended. The process turned out to be simple, robust and provided Ron with exactly what he had been looking for."

Another factor in the decision to choose Acumatica was the licensing model, allowing unlimited users. Mr. Krieger says, "It played a large role, because we plan on growing and maybe integrating with other companies. It's a very important feature for any company."

Mr. Krieger points out that Acumatica is also easy for staff to use: "It's very sophisticated software, but the ease-of-use of this kind of software is an important issue."

As they've implemented the new system, Acumatica partner Cortekx has earned Mr. Krieger's praise: "I have to compliment Cliff and his staff for doing an outstanding job." He adds, "Acumatica should be proud that they're a distributor for them."

## BENEFITS

Consolidated West CFO Krieger praises Acumatica's ability to fit the two systems together. "The software writers did a good job in making it easy to adapt our program to it. I think that's a real big feature. Because sometimes people will have a sales program and then try to integrate it and it never even comes close. This one works," he says. The ATI CEO, Frank Marafino, adds, "The integration is robust... From an IT perspective it's very good."

The switch to Acumatica has saved him and his staff a lot of time, Mr. Krieger says. "You want to know what your true profit is, and your balance sheet; you want to know how your cash and Accounts Receivable and Accounts Payable are doing," he says. "Instead of having to take all the information from one program, and use it in another program – which got all mixed up and I'd have to go redo everything and spend a lot of time – here it automatically comes over from the sales program to Acumatica."

CFO Krieger adds, "Acumatica has completely changed our business. I just look in the accounting and all the information from the sales is in there... For our business that's a big deal. I have to supply financial statements every quarter for the bank for different things; now it just takes me a minute to print it off."

ATI CEO Marafino is also pleased, saying, "We eliminated 100% of their double-data entry. With integration you want to get rid of all redundancies and have good checks and balances in place, and with a full audit trail." Based on this experience, Mr. Marafino has recommended Acumatica to another company, he says, "For three reasons: it's a better platform – better user interface, better tools; it has better reporting, and we already have the integration done. One of the biggest complaints about Solomon is the reporting."

Mr. Marafino also values Acumatica's extensibility and its flexibility: "Some of these Cloud solutions, they force you into their Cloud they're hosting, so they own you. If you don't want to go that route, if you want to host it on your own hardware, in your own office or in your own data center, you can't. But with Acumatica you can." He adds, "There's a number of different ways to implement a Cloud concept, with or without a browser. Whether it's an actual web address or terminal server, or Citrix or VMware, those are all remote accessible platforms that work great; Acumatica will run on any of those, which is excellent."

Mr. Krieger appreciates having accurate data: "That is what you want in a business, in every business, big or small – you want to know certain things about your particular business and focus on those, and I think Acumatica does that." In addition, he says, "I try to be ahead of the game... Every day when I come in, I look at all the reports that I have... I have a pro-active approach to business. That's really important."

Cortekx is currently working on developing business intelligence for Consolidated West using the integration between Acumatica and Microsoft's PowerBI that will allow them to keep their finger on the pulse of their business in real time, positively impacting profitability.

For the ATI CEO, Frank Marafino, Acumatica is his first choice for his customers. He says, "It's number one on my list of accounting systems right now."

At Consolidated West, CFO Ron Krieger shares that view: "I would recommend Acumatica to anybody. It's a very sophisticated program."