CUSTOMER SUCCESS

Sage BusinessWorks Re-tools Accounting for Leading Sheet Metal Fabricator

Burgess Specialty Fabricating is one of Houston's largest sheet metal fabrication shops, providing high-precision services for clients in many industries.

Software Meltdown

Unfortunately, the DOS-based accounting software that Burgess Specialty was using didn't uphold the firm's demanding standards. The aging software had been modified so many times to meet the company's industry-specific needs that it scarcely resembled the package described in the documentation.

Consequently, only the computer programmer who had made the modifications could effectively troubleshoot problems in the accounting software. Even more troubling, the numerous modifications had rendered the program vulnerable to intrusion. Anyone in the company using the software to create a bank requisition could enter the payroll section without a password and could alter records undetected.

When Lydia Engolio joined Burgess Specialty as controller, she quickly determined the unsuitability of the accounting software. "That software was absolutely incapable of doing what I needed it to do," says Engolio. The company's president, Bill Burgess, concurred with her recommendation to identify a new accounting software package that could provide security and accommodate the growth of the company.

A Higher Standard of Efficiency

Engolio consulted with financial management colleagues in other businesses, whose recommendations included Sage BusinessWorks 50 Accounting. Working with a Sage BusinessWorks reseller, she and Bill Burgess along with the company's payroll manager evaluated software systems costing as much as $20,000, before determining that Sage BusinessWorks best met the company's needs. "In comparison with other software products, Sage BusinessWorks is very moderately priced," she beams. Moderate cost notwithstanding, functionality was the foremost objective in choosing software. The way in which Sage BusinessWorks handles creation of new general ledger accounts was fundamental in their decision.

Customer:

Burgess Specialty Fabricating, Inc.

Industry:

Precision sheet metal fabricating and machining

Location:

Houston, Texas

Number of Locations: South and Southwest

Number of Employees: 55

System:

Sage BusinessWorks

- Accounts Receivable
- Accounts Payable
- Crystal Reports®
- General Ledger
- Payroll
- System Manager
- Cash Management

CHALLENGE

Replace substandard software with a completely automated accounting system that provides extensive financial management capabilities and easily accommodates growth.

SOLUTION

Sage BusinessWorks financial and Payroll modules.

RESULTS

Streamlined automation from A to Z; seamless data flow; improved accuracy; easy payroll processing; precise reporting, tax and deposit tracking; quick month-ends; automatic AP set up; strategic financial insights.

"When I set up a new general ledger account in our old software, I also had to manually enter corresponding data in the income statement portion of the program, thereby introducing the possibility of data entry errors that would affect our month-end balance. Now when I set up a new general ledger account in Sage BusinessWorks, I identify the type of account, such as income or cost of goods sold expense, and it automatically hits our income statement in the proper area," explains Engolio.

"Payroll functions are particularly important for us because of all the tax reporting the company is required to do," said Engolio. The Sage BusinessWorks Payroll module prepares time-consuming payroll reports and records including paychecks, W-2 forms and government reports. Sage BusinessWorks substantially eases the burdens associated with tracking tax liabilities and deposits. "Payroll taxes were particularly demanding with our old system. Month-end journal entries used to take a half day of my time, but Sage BusinessWorks has trimmed that down to a half hour. That's because the modules are all linked, so I no longer have to make payroll tax journal entries at the end of each month. Sage BusinessWorks does that automatically."

Engolio also praises the recurring invoices feature in Sage BusinessWorks. "That's helpful for expenses such as rent," she explains. "Once we close out at the end of a month, Sage BusinessWorks automatically sets up Accounts Payable for the next month."

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ABOUT SAGE SOFTWARE

Sage Software supports the needs, challenges, and dreams of more than 2.7 million small and midsized business customers in North America through easy-to-use, scalable, and customizable software and services. Our products help manage a complete range of business functions including: accounting, operations, customer relationship management, human resources, time tracking, merchant services and the specialized needs of the construction, distribution, healthcare, manufacturing, nonprofit, and real estate industries.

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