

Oates & Company and Sage ERP MAS 90 Puts the Smile Back at Balloons Inc.



Balloons, Inc.

Industry

Gift wholesaler and distributor

Software

Sage ERP MAS 90

Benefits of Working with Oates & Company

- Tailored training program for each department
- Outstanding accounting, technical and product knowledge
- Precise cost information
- Reports that show salesperson comparative data
- Access to data helps to plan for the future
- Impressive response time
- Able to grow company without adding staff

“Delivering smiles” is the mantra at Balloons Inc. Supplying hospital gift shops with items such as balloons, candyloons, new baby gifts and other gift store products, Balloons Inc. strives to deliver the highest quality items with exceptional service and fast delivery times. Operating from their 100,000 square foot facility, Balloons Inc. assembles and stores products for their customer’s convenience. From here, items are shipped all over the country, ready to deliver a smile.

Growth Leads to New System

Over time, Balloons Inc outgrew their entry-level accounting system, which was not designed to support multiple users. Additionally, Balloons Inc had thousands of customer, invoice and inventory records. The database became unbearably slow and it was extremely time consuming to process basic transactions and create reports. Balloons Inc. turned to their CPA for a software

recommendation. Sage ERP MAS 90 was recommended and Balloons Inc. started their implementation. Unfortunately the company they originally used was not working out. “We were working with a consultant who did not understand our needs or accounting,” said Susan LaRue-Gattis, CFO of Balloons Inc. “While they tried their best, we needed to find someone who understood manufacturing, accounting and who had a team of people to support us.”

Implementation Back on Track

“Sage ERP MAS 90 runs our entire operation,” said Susan. “We track thousands of inventory items and use the Bill of Materials to track our assembly. Nothing was integrated or posting, needless to say, we were frustrated.” Balloons Inc. found Oates & Company and knew they would get them on track.



Oates & Company

An Oates & Company Client Case Study

“Oates & Company had the accounting knowledge, the technical knowledge and the software knowledge to get us running smoothly.”

**— Susan LaRue-Gattis
CFO
Balloons, Inc.**

“The first thing Oates & Company did was spend time with everyone who used Sage ERP MAS 90. They took the time to learn what functionality was important to each department and where our people were frustrated,” said Susan. “From there, Oates & Company designed a training plan for the different departments. While we had been using the software for almost a year, it was amazing the things we did not know. After Oates & Company had completed the training, our people were so much happier. Processes were easier to complete and data was far more accessible.”

“Our costing information was difficult to determine on our old system,” said Brenda Weedon, Balloons Inc.’s controller. “Since we did not have a way to allocate labor to what we were assembling, we did not have an accurate cost of our items. With Sage ERP MAS 90, we now have precise costing information, which helps us understand our profitability.” Balloons Inc. can make any adjustments quickly now that have the potential to impact their margin.

Moving Forward

Now that Sage ERP MAS 90 was properly set up and the team at Balloons Inc. was trained, Oates & Company could help Susan with other projects. “We have about a dozen remote salespeople across the country,” said Susan. “Our owner wanted a custom report that showed product sales by salesperson along with some additional comparative data.” Oates & Company created a report that gave what each salesperson represents as a percent of the whole along with

comparative numbers from the past month, quarter and year. “Having this report helps us understand salesperson performance along with profit information,” said Susan. “We also see trends in purchases and it helps us plan for the future.”

Since Sage ERP MAS 90’s database is designed to handle a tremendous amount of transactions, Balloons Inc. has enjoyed faster processing and access to information. “It used to take hours to run an aged receivables report,” said Brenda. “Now it is instant. We also can email invoices to customers, which saves on postage and gets the invoices out quicker.”

“We are so pleased with the overall speed of the system,” said Brenda. “There are so many areas that have been improved simply by using Sage ERP MAS 90. Information is at our fingertips. Our people are more efficient and we have been able to grow our business without adding more people.”

“I don’t know where we would be without Oates & Company,” said Susan. “They are always here for us, 24/7. They have a great staff and their response time is impressive. We look forward to working with them in the future.”



Authorized Partner



Oates & Company

**2309 West Cone Blvd. Suite 220 Greensboro, NC 27408
(800) 320-0210 • (336) 230-0200
www.OatesCo.com**

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