

Oates & Company's Integration Expertise Toasts Success for P.A. Short Distributing Co.



P.A. Short Distributing Co.

Industry Distribution

Software Sage MAS 200

Benefits of Partnering with Oates & Company

- Route accounting system and accounting system are integrated increasing efficiency
- Owners can make better, quicker decisions
- More satisfied customers and employees
- Quick response time to questions

For more than five decades, P.A. Short Distributing Co. has been selling and distributing beverages exclusively from Anheuser-Busch. As an authorized wholesaler, retailers and lounges within 50 miles of Roanoke, Virginia depend on the availability and timely delivery of beverages from P.A. Short. Based out of their 50,000 square foot facility in Hollins, VA, P.A. Short needed to find an accounting system and service partner that they could depend on as much as their customers depend on them.

Need for a New System

"We had been using an automated accounting system since 1994, but we knew that we had to find a better solution," said Vicky Reed, P.A. Short's Office Manager. "Also, we knew we had to update our route accounting system and the two systems needed to integrate with each other." P.A. Short was using a system that was recommended by Anheuser-Busch for its wholesalers. Over time, the

company supporting the DOS-based system fell out of favor with Anheuser-Busch and support and integration opportunities were limited.

The route accounting system is critical to P.A. Short. Not only for the 17 driver's to manage their inventory and customer needs, but P.A. Short must comply with Virginia's Alcoholic Beverage Control Board's (ABCB) regulations. "One thing the state requires is that no alcoholic beverages can be sold on account," said Vicky. "The product must be paid for at the time of delivery." Each of these 17 routes also needs to be rolled up into one system and then sent to the accounting system. P.A. Short selected Intervolve's route accounting system, which is easy to use and offers integration features. Intervolve introduced P.A. Short to Oates & Company. "We were fortunate that Oates & Company was the firm Intervolve recommended," said Vicky.



Oates & Company

An Oates & Company Client Case Study

“Oates & Company has tremendous in-depth system knowledge of and they really care about the success of our business.”

**—Vicky Reed, Office Manager
P.A. Short Distributing Co.**

Integration is the Key

Oates & Company quickly got to work with Intervolve defining what data needed to be brought over from the route system to Sage MAS 200, the accounting software that Oates & Company recommended. To start, there were several points in the general ledger and accounts receivable that needed to be integrated. These points had to do with the way cash receipts were handled for beer deliveries, which again is critical due to the regulations of the ABCB. “Oates & Company was excellent. They worked with Intervolve and then delivered a complete system to us,” said Vicky.

The routing system prepares a daily report that summarizes the daily sales and inventory activity, which is maintained and sent to Sage MAS 200. “Before the integration, it was taking a week to determine gross profit. Now, I can get the information in less than two days,” said Vicky. “The quicker I can get this information to the owners, the quicker they can make better decisions.”

There are future plans for additional points of integration in the accounts payable and payroll functions.

Processes Smoothed Out

“One problem that we had was sometimes our drivers had to wait for someone to sign a check,” said Vicky. “Not only was it inconvenient for our customers, but it caused our drivers to be delayed on their delivery routes. With MAS 200, we have been able to set up pre-paid accounts that comply with the Virginia ABCB requirements. This enables us to get paid faster and our customers’ deliveries are on time.”

Another area that has seen productivity improvement is with payroll. “Since we have a 10-day pay cycle, our pay periods often fell between two accounting periods. With our old system, we would have to manually calculate how much fell in each month and make

adjustments to the general ledger. We also had to compute regular, overtime and commission amounts manually and again make the journal entries,” said Vicky. “Oates & Company set up the Sage MAS 200 system so the allocations are done for us. This ensures payroll information is in the correct period and of course it saves us a lot of time.”

P.A. Short is also taking advantage of using payroll direct deposit. “Oates & Company worked with our bank to get this working correctly,” said Vicky. “Almost half of our employees participate in the direct deposit program, and they love it. It is great that we can offer it.”

Valuable Relationship

“It is obvious that Oates & Company are experts,” said Vicky. “They are always quick to return our support calls and often can dial in to lead me through any process I might be having difficulty with.”

Vicky also attended Oates & Company’s annual customer conference this summer. “The conference was excellent. I really liked all of the hands-on sessions that were offered,” said Vicky. “It was good to talk to other companies using MAS 200 as well.”

As for future plans, “We are planning on using FRx for our financial reporting,” said Vicky. “When we are ready to design our financial statements, I will go to Oates & Company’s offices to have their experts help get everything set up. I know exactly how I want our financials to look and I know that Oates & Company will make it happen.”



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