

## Helping the company to expand, communicate and go global

### Situation

Southern Implants has grown from a one-person accounting office in Fairfax, Virginia to a global business which supports a manufacturing operation and more than 10 sales agents in North America; the company operates multiple remote locations.

### Challenge

As a multi-location company, and faced with company expansion, Southern Implants needed an effective user-friendly system, providing accurate, detailed and speedy delivery of business information..

### Solution

With Blue Link Elite, business intelligence can be gathered, consolidated and used efficiently across the entire company – no matter how far expansion plans take it. “Everyone now has the information they need to do their job.”

### Situation

Established in 2002, Southern Implants develops, manufactures and markets dental implants and related components. Innovative solutions and superior service are key success factors in this company’s success as a recognized leader in proprietary implants. A sister company was established in South Africa in 1988.

Dental implants are sold direct to implant surgeons and restorative dentists in the USA and Canada. The company sells through distributors in Chile, Columbia, Guatemala, Mexico, Vietnam, Taiwan, Malaysia, Singapore, and the Middle East.

Southern Implants has evolved from a one-person accounting office in Fairfax, Virginia to a global, investor-backed business based in California, USA, which supports a manufacturing operation and more than 10 sales agents in north America; the company operates multiple remote locations.

### Challenge

Rapid company expansion involved simultaneously opening new headquarters in Irvine, Southern California and arranging support for multiple remote locations, while also maintaining the existing Fairfax site. Management required 24/7 access to system data from multiple locations and while traveling.

The Fairfax office originally took care of all activities, controlling invoicing and accounting entries, accepting telephone orders, pulling product from shelves and shipping orders; there were three sales reps on the road.

Company expansion meant that the accounting system would need to handle multiple users; track lot numbers; deal with multiple stock locations (consignments) and geographically dispersed users; provide multiple languages for products and terms; and control manufacturing and user access rights.

In addition, hiring Canadian sales representatives meant the system would have to deal with multiple currencies (international sales would be handled in \$US), and provide real-time product, trend and customer account information through a multi-server system allowing multiple and simultaneous user login.

Pricing was from a standard list, but customers received discounts that might not apply to all products but to groups of products; the separate Canadian price list would be in \$CAN; dealers and other large customers would have unique pricing; and customers’ and products’ taxes varied by jurisdiction.

Product tracking, using lot control, would need to track sales by lots in the event of a recall of product; with dental products, every batch produced must carry its individual batch number. Inventory control had to cover various situations: individual tools with separate part numbers would be sold separately, and bundled in defined kits and shipped as such; major customers would carry

large inventory consignments; and the sales representatives' saleable car stock would also be included as part of the company's overall inventory.

As a multi-location company, Southern Implants needed a user-friendly system, providing accurate, detailed and speedy delivery of business information.

Mike Nealon, Southern Implants' CFO, set a six to twelve month target to find the right system and get it implemented and working seamlessly. His "must-have" list included:

- quick learning curve
- highly intuitive
- graphical (rather than just textual) user interface
- efficient data conversion process for rolling existing data into a new system
- full integration, with minimal need for 3rd party add-ins and workarounds
- proven program, low likelihood of problems
- minimal custom work
- efficient data transfer
- good user and group access control
- multiple-pricing sales options

Specific system requirements included:

- multi currency (as Canadian business could be substantial);
- multi warehouse to accommodate consignments, representatives' car stock, and additional company locations;
- departmental tracking of revenue, costs of sale, and expenses for each sales territory;
- open item or balance forward methods for individual customers;
- ability to deal with instances of temporary negative stock; and
- efficient back-order tracking of both purchasing and selling sides.

In addition, the system had to generate financial and operations reports, enable report modification with relative ease, handle budget data, and keep legacy data open for access by report writing programs.

Nealon looked at various accounting systems, concentrating mostly on the larger, mid-market names. But their inability to match all his requirements was frustrating:

"The systems cost a lot of money, and they were all missing at least one or two vital things."

## Solution

Then a business writer recommended him to Blue Link.

"Michael Burns said I'd be making a big mistake if I didn't consider Blue Link," says Nealon.

He was amazed at the system's capability, "covering all the bases, with nothing wanting", and Blue Link's cost efficiency: "We knew we had to pay whatever we had to pay, but we didn't want to overpay!" In fact, Nealon found that the Blue Link cost was reasonable, making it both cost effective and cost efficient.

Implementation was challenging: "We had a one-person office in Fairfax, VA, and we needed to set up in Irvine, CA; we didn't have a hub; we needed to train people; and Blue Link's office is in Toronto, Canada."

However, Nealon adds, "Blue Link Elite was immediately useful, right out of the box. Darren at Blue Link is just a master, he knows what he's doing, understood what we needed, how the data is stored and put it all together."

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Reports were created around sales, margins, products and inventory (historical data was extracted from QuickBooks and loaded into the Blue Link system) using SQL Reporting Services, a powerful, somewhat complex utility built into the SQL-Server. Nealon says, "I had no worries, concerns or problems, other than giving Blue Link the data and answering a number of questions about how it

would work. It was all very smooth. Training on the system was at multiple locations at multiple times, with Blue Link assisting in the training process. An added functionality are the 'webinars' that Darren recorded for users to watch."

Installing and integrating Blue Link Elite plus Microsoft's SQL Reporting Services plus Global Software's Spreadsheet Server allows Southern Implants to efficiently process and access information in a fraction of the time and effort previously required, thereby meeting the challenges of its expanding global business.

"It used to be," Nealon says, "that I had to stop what I was doing just to do some basic reports. Our President would call me up and ask me for something, and it could take a long time – now, it's all automated, it's wonderful."

With the Blue Link Elite system in place, business intelligence can be gathered, consolidated and used efficiently across the entire company – no matter how far expansion plans take it.

Nealon concludes, with obvious satisfaction, "Everyone now has the information they need to do their job."

