

HEALTHCARE DISTRIBUTION SOFTWARE CASE STUDY

CONVAL-AID



Situation

Established in 1976, Conval-Aid distributes a wide range of quality health care products and services to customers across Eastern Ontario.

This includes new and used hospital equipment and supplies, and medical and home-care provisions. The company also rents out equipment – from shower-chairs and wheelchairs to walkers, daily living supplies and stair lifts. Solid, family-based values such as honesty, reliability, friendly service and personal care, combined with expert advice, are key components of the company's growth and success.

In 1976, Don Ed started the enterprise in partnership with a friend. The business rented and sold wheelchairs, while operating from a car and a small office with one desk, one filing cabinet and one phone. Don's wife, Judi, did all the paperwork and accounting at the family home, using Excel spreadsheets. Relocation to a more customer-visible business address in 1980, combined with general growth in the health care industry, generated more sales and led to business expansion. In 1985, the Ed family became sole owners of Conval-Aid. The company relocated to the current premises in 1996.

Conval-Aid has evolved from a part-time, two-person endeavour to a family-owned company with more than 20 employees, including a service department and outside sales staff. It operates from a head office in Ottawa, Canada.

In the early 1990s, the Eds partnered with Don Johnston to develop a new company called Liftability, which supplies driving-related solutions for special needs customers, including van conversions, hand controls and lifts.

Merrill and Stuart Ed now manage the company, having taken over the day-to-day running of the business from their parents.



Challenge



The company continued to expand through the 1990s.

By 2000, the original accounting system (the successor to the Excel spreadsheets) couldn't accurately handle the increasing amount of information, was slow in operation and was unable to cope with multi-users. The system was increasingly inefficient, especially as third party billing was becoming complicated, with different components being supplied from companies all over the country; this demanded comprehensive internal tracking and accounting abilities. In addition, internal accounting controls were minimal, and internal security control was becoming an issue.

Conval-Aid looked at several systems, mostly in the larger, mid-market range. They quickly realized those systems were not only expensive but, more importantly, didn't offer the customizable features needed for the growing company.

However, the company had time constraints because of business pressures and the need to maintain its reputation for excellent customer service, which depended in large part on an efficient, effective accounting system.

“We couldn't spend too much time looking - A speedy decision was important to us.”

MERRIL ED

Solution

Blue Link ERP was recommended by both a business contact in the IT market, and the company accountant. After thoroughly investigating the company and its solutions, Conval-Aid decided to ask Blue Link to install its customizable accounting software with healthcare distribution features. An important factor in the decision was Blue Link's willingness to customize the solution to Conval-Aid's needs, and to assist with implementing the new system.

**“No other company would do that for us in Ottawa,”
says Merrill**

Implementation went ahead, with Blue Link staff travelling from its Toronto head office to Conval-Aid's Ottawa office to help with the installation of the new system, including integration with the old system.

“There were very few problems,” recalls Merrill Ed. “Blue Link took care of all the integration into the new system – it all went very smoothly. And Blue Link also did all the customization, and we really liked that.”

The company's complicated third-party billing system needed particular customization, as Conval-Aid's health care products are made up of various components, which come to them individually from different companies. The process is four-part:

- The customer orders a customized product
- Conval-Aid orders the individual components from various suppliers
- The components are then customized on site, and
- The parts are finally put together to make a complete, customized unit

Each separate portion of the finished product has to be billed on a percentage basis to different organizations and companies.

The shipping system also presented challenges, for which Blue Link created additional customization. As Merrill Ed explains: “Take a wheelchair for example. Perhaps a member of the family, the daughter or the son, has ordered the wheelchair and is paying for it, but the product itself is being shipped to the father – at a different location. We have to be able to easily take care of all those details, and the Blue Link system lets us do that.”

In addition, the invoicing process had to be able handle complicated and detailed invoicing structures. For example, certain percentages of a total invoice might need to be allocated to different companies, such as a percentage of a bill being allocated to the Easter Seals foundation because it had sponsored a particular product. And, as Conval-Aid is a registered vendor with the Ontario Provincial Government's Assistive Devices Program, which assists in funding up to 75% of the purchase of prescribed equipment and supplies for Ontario residents with long-term disabilities, that arrangement also requires a detailed, customized invoice system.

Results

Often, there are many people inputting information into various invoices, all at different times. With the previous accounting system, that multiple inputting could result in duplicate invoicing.

As Merrill Ed says, “The Blue Link system even allows us to deal with that”.

She adds that training on the new system was relatively easy. “Blue Link showed a few of us how to do it, and then we mostly trained on-site ourselves. Of course, some people are better at computers than others, but once you know the system then it’s fine – in general, the staff found it very user-friendly.”

Merrill Ed emphasizes that she finds Blue Link to be “very helpful, with excellent customer support and service. Usually, we only need to call them once a year or so, or about upgrades. We’re very happy with them.”



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