

Training Onsite Multiplies Benefits



What makes Van Eaton & Romero an outstanding company in their expanding Lafayette market is how comfortable they make their clients feel.

From the first question, “Tell us what YOU want”, to their engaging client office suites, the firm’s desire to help and obvious successful track record draws new and repeat customers every day.

Initial Meetings with Owners Gail, Nancy, and Bill where they told REAL/Easy what they wanted, set the agenda for the three day onsite training and shape-up

1. Owners Tell REAL/Easy What They Want:

- Shape-Up how We are using the system—we must be more efficient with processing the business and we must provide more services for our agents.
- Train the Accounting and Closing Staff—we want them to learn the best way to use the programs.
- We don’t want to be doing anything the hard way—Implement beneficial capabilities we are not taking advantage of.
- Give recommendations on use of the system and resources.
- Increase overall staff efficiency and accuracy with improved system integration.



Gail Romero, William Bacqué, and Nancy Van Eaton Broussard

2. Reorganize Data to Match Current Organization



Van Eaton and Romero, like many expanding companies, open, close, combine, and purchase office locations as they gain market share and increase their sales forces. During expansion, existing front, back, and financial systems still have to track the business. Often, there is not

enough time, nor tools, to reorganize the systems as the physical business is changing. When this happens, it takes more time to process the business as the staff has to translate, divide, and combine data to the old profit center ID’s.

A key **first step** in the “reorganize” was to learn how the owners wanted to track their business.

The **second step** was to map how each of their key systems were tracking the business.

Step three was to outline how to reorganize the BOS data to

represent the owners view of the company and to better interface later with the financial systems.

Step four: Using the set of Tools in REAL//Easy, data in BOS was moved and reorganized in the first evening after the day’s business processing.

NOTE: Contact REAL/Easy for help with how to reorganize your company’s data to better run the business with these unique and powerful “Tools”.

3. Improve Integration: Multiply Efficiency and Accuracy

At Van Eaton & Romero, three key systems are used to run the business:

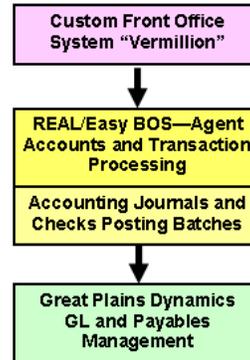
- A custom built customer service front office system.
- REAL/Easy BOS for transaction and agent account management.
- Great Plains Dynamics®— Payables and Financial management.

To help these systems work together without having to re-enter data, integrations are setup using tools from REAL/

Easy and the other two systems.

A key improvement was a new setup for the BOS to Dynamics integration. Working with the Dynamics consultant, REAL/Easy added the BOS batch number into the journals fed to Dynamics. Dynamics was then adjusted to use the same batch number as BOS,

“Batch reports” from each system now save hours of time verifying posting between the systems because they are the same in each.



Using Common Batch Numbers, BOS becomes an “easy to verify” subsidiary journal for Dynamics.

4. Move MICR Commission Check Writing—4 Steps into One

Calculate Commissions in REAL/Easy
Step 1: Print Commission Worksheet in REAL/Easy
Step 2: Post the Commission to Dynamics Payables Invoices
Step 3: Print the MICR Commission check with Dynamics. Give the Check and the Worksheet (Step 2) to the sales agent.
Step 4: Print an accounting detail for the Commission Check for the accounting department

Before



A key closing staff task is providing agent checks as soon as possible after the closing. While printing MICR checks in Dynamics was a convenient option, this required a number of steps that were time consuming (see left).

By moving the MICR commission check printing into REAL/Easy, this task now takes just minutes. And, because REAL/Easy has all of the transaction, commission, and journal details, these can be printed on the stubs eliminating the need for added worksheets



Calculate Commissions in REAL/Easy
Step 1: Print the expanded 2-stub MICR Commission check with REAL/Easy. Give the Check and Stub 1= worksheet to sales agent and Stub 2= accounting detail to the accounting department.
Later, post Commission to Dynamics Payables Payments

After

5. Speed Info to Agents: Email Production\$ and Account\$

To Keep Agents up to date the company prints monthly production reports from REAL/Easy. The reports were distributed to sales agents by mail or managers in the offices.

Further, agent account statements were printed and distributed in the same manner.

While onsite, REAL/Easy suggested adding the report and statement eMail module. In one step, the staff can email out 150 monthly production reports or account statements. This was implemented following the visit. The staff entered all of the agent’s email addresses in BOS and setup the new emailing module.



One Step eMail



Reports, Invoices To Agents

