

# ATR Drives Home Success

## For Kelley Fleet Services—A Sage MAS 500 Solution

### Solutions Spotlight

**“ATR has brought a lot of solutions to the table. I have never seen another set of professionals with this much experience and talent.”**

**Yvonne Boyer CFO, Kelley Fleet Services Inc.**

**D**on Kelley had a vision for a new model of fleet management, one where the customers would own the trucks and his company would provide turnkey onsite maintenance. He knew he was on to something big, but he couldn't have anticipated that in just five years his company, Kelley Fleet Services, LLC (KFS) would be the fastest growing fleet service company in the United States. Starting with the giant PepsiCo, KFS has since added Alta Dena Dairy, Schwan's, and several other Fortune 100 companies to its growing list of clients.

#### **System Breakdown**

Back in 1999, when KFS started operations, QuickBooks was a logical choice to manage the company's relatively modest volume of accounts payable and receivables. However, once the company's volume started growing, it was obvious a new system was needed. With a monthly accounts payable volume of 5,000, the payable clerks often had an entry backlog numbering in the thousands.

#### **Back On The Road**

Yvonne Boyer, CFO, was hired at about this time and charged with finding and implementing a business management system capable of handling the company's immediate needs as well as allowing for the anticipated growth. She asked Accounting Technology Resources, Inc. (ATR) to propose a solution for the company.

“When I met with ATR, it didn't take me long to decide that this was the company I wanted to do business with,” says Boyer. ATR presented both Sage MAS 200 and Sage MAS 500, but the performance and scalability of SQL Server platform combined with the advanced capabilities and integration with other applications made Sage MAS 500 the clear choice for Kelley Fleet Services. The implementation went perfectly, Boyer elaborates “We went live in one day, and have had zero issues.”

ATR handles all IT support for KFS as the company does not have its own IT department. “ATR



With Sage MAS 500 and 2000Soft, KFS saved 80 labor hours per week by automating data entry tasks.

is always there for us, they're willing to work during off hours if needed, even if that means 3:00 in the morning—they deliver wonderful customer service.”

#### **Delivering Efficiency**

KFS generates a purchase order for each maintenance or service activity required for the fleets it manages. Purchase order requests came in from 40 separate offices across the country, typically in the form of an Excel spreadsheet. Boyer's accounting staff then had to rekey those orders into Sage MAS 500, a tremendously time consuming and redundant process.

ATR designed and created a Web-based purchase order system to interface with Sage MAS 500. Now staff at those 40 offices can enter purchase orders over the Internet, and those purchase orders are directly updated into Sage MAS 500—with no

effort on the part of Boyer's accounting staff. Even with the high volume, Boyer says processing time within Sage MAS 500 is instantaneous.

The purchase order data entry process that used to take 80 labor hours per week is now accomplished automatically.

### Less Is More

As the company's spectacular growth continued, and new customers were added, the volume of accounts payable invoices quadrupled to over 5,000 per week! The volume of paper was enormous, "We were filling an entire file cabinet each week," recalls Boyer. The company needed a way out of its paper predicament, and Boyer turned to ATR.

ATR introduced KFS to Altec's doc-link, a document management solution which integrates with Sage MAS 500. Using doc-link the accounting staff can match purchase orders to vendor invoices directly on their desktops for quick reconciliation and resolution. Data entry of the invoices takes place as the operator views both the electronic copy of the invoice and the Sage MAS 500 Accounts Payable Invoice Entry screen on their desktop. The doc-link workflow allows documents to be electronically routed, approved, and managed, providing greater visibility, increased control, and better security. Rules defined by KFS, such as a certain vendor, over a certain amount, etc. will cause an invoice to be flagged for further review. Boyer can review, approve, and route invoices right from her desktop, without ever touching a piece of paper. With the efficient remote access capabilities KFS enjoys, Boyer quips, "I could be in Hawaii and be reviewing invoices — not such a bad idea."

### Service In Motion

Recently, when KFS wanted to launch a 24-hour call center where its customers can call when they have a problem with a vehicle in the fleet,

they turned once again to ATR. ATR arranged for a high-tech IP phone system, and implemented Sage SalesLogix Support, fully integrated with the new Web based purchase order system. The call center was up and running within 60 days. Recently, when the company moved operations, ATR's IT staff was able to move the servers and phone equipment and reestablish operations in less than two hours.

Sage SalesLogix Support is the backbone of this call center. Service representatives use Sage SalesLogix to track these service incidents, which KFS refers to as purchase orders. Each vehicle is assigned a unit number. When the unit number is entered, Sage SalesLogix shows the full history of the vehicle, including a list of parts and approved vendors. The operator then records the selected vendor and the parts needed to make the repair on the purchase order. When saved, the purchase order is sent to the Sage MAS 500 Purchase Order module just as if it were entered there. Literally thousands of these orders are handled by the system each week.

### Steering A Successful Path

Through the enormous efficiencies of Sage MAS 500 and its companion products, and the skillful integration executed by ATR, KFS has been able to trim its accounts payable department employees from twelve down to just four. "We couldn't run this business without these tools," says Boyer.

"ATR has served as our project manager through all of these changes. Whenever we have a need, they coordinate the solution, always acting as our advocate, and always involved in every activity," continues Boyer. "ATR has brought a lot of solutions to the table. I have never seen another set of professionals with this much experience and talent."



2000Soft implemented Sage SalesLogix Support for KFS to help them track their support activities.

**H**eadquartered in Costa Mesa, California, our firm has specialized in Sage MAS 90, Sage MAS 200 and Sage MAS 500 since 1987.

Our extensive experience, exceptional service, and broad expertise assure you of our ability to solve even the toughest business problems.

If you would like to fine-tune your firm's business model, we would like to talk with you and see if Sage MAS 90 is the right solution for you.



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