Jensen Global Streamlines Operations with Sage 100 and Platform Technology Advisory

CUSTOMER
Jensen Global, Inc.

INDUSTRY
Dispensing Systems and Supplies

LOCATION
Santa Barbara, CA

OTHER INFO
Founded in 2002

JensenGlobal.com

SYSTEM
- SAGE 100 ERP
- Order Processing
- Purchasing
- Inventory Control
- Bill of Material

The term "streamlining" often pops up in conversation when Greg Jensen, founder of **Jensen Global**, describes his business. For Greg, streamlining operations is at the core of business efficiency – getting more done with less effort, fewer resources, and at lower cost. He says, "Even though we're still a small yet growing company, we're very progressive about leveraging technology."

Greg founded Santa Barbara based Jensen Global in 2002, after 13 years of significant experience already in the industry. **Jensen Global** has become a recognized leader in dispensing systems and supplies for electronics, industrial, aerospace, and life sciences.

Silos Are For Corn, Not For Data

By 2014, the company recognized the limits of its existing Sage 50 Accounting Software (formerly known as Peachtree). Manual and redundant data entry errors were becoming all too common, affecting business health and profitability.

Greg notes, "If your business expands, you'll eventually outgrow the basic accounting software you started with. What began as a quick 'off-the-shelf' solution with a few manual workarounds grew into a problem that limited business growth and productivity as we added more employees, more transactions, and more complexity."

Every business process had its own isolated silo, Greg explains. "We would enter orders in the accounting software, manage our production assembly entries manually (offline), ship products through UPS on another platform, then circle back to the accounting software so

we could invoice orders one-at-a-time at the end of the day."

Transactions were entered and re-entered multiple times in various systems - from accounting and production to shipping and invoicing - all of which was slow, labor intensive and error-prone.

All in the Family

Greg knew it was time to break down departmental barriers and activity silos to create synergy and to streamline operations. For Jensen Global, that meant looking at a complete ERP solution, not just another accounting application.

"We looked at many different ERP solutions. But since we had been with Sage 50 (Peachtree) almost from day one, it just made sense to stay with Sage products so we decided to look into **Sage 100 ERP**."

That's when they discovered **Platform Technology Advisory**, a full-service accounting and technology firm based in Santa Barbara County. After meeting with Platform Technology Advisory, Greg knew they were more than just a Sage Authorized partner. He says, "The guys at Platform Technology Advisory are very sharp, and not just with technology. Their experience and savvy with business and financials is also a tremendous benefit to us."

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> _"The guys at Platform Technology Advisory are very sharp. It's nice to have a one-stop shop where I can hand our tax, accounting, and technology off to them and step out of the way."_
>
> **- Greg Jensen**
> Founder
> Jensen Global

> _"The amount of time we're saving is unbelievable. We've increased productivity by over 40% with Sage 100."_

A Total Transformation

Sage 100 ERP and Platform Technology Advisory have greatly assisted in a significant transformation at Jensen Global. Transactions are entered just one time and then flow through the entire system from order entry to invoicing. Nothing is managed outside the system and duplicate data entry is eliminated. Sage 100 ERP also integrates seamlessly with UPS, passing data back and forth without manual re-entry or having to reconcile mismatched and duplicate customer records or account numbers.

All production entry, assembly, and shipping happens in one system with no more spreadsheets, hand-written notes, or manual "after the fact" adjustments in the computer. Greg adds, "Once the product is ready to ship, we press a button to produce a packing slip which automatically creates an invoice in the system for our accounting department to simply review and send. It's fast, real-time, and mistake-free."

Greg says, "The amount of time we're saving is unbelievable. In fact, we've increased productivity by more than 40% with Sage 100 ERP."

Beyond The Basics

As Jensen Global and Platform Technology Advisory continued to work together, other areas of improvement and operational efficiency came to light.

Customer orders received on the website are now 'hands-free.' Greg points out, "Every two or three minutes, Sage 100 ERP automatically imports order data from our website and it goes right into production. Before, we were handling these transactions manually so the integration is a huge time savings for us. It also solved one of our critical sources of data entry problems big time."

Even vendor payments are streamlined thanks to ACH (automated clearing house) functionality in Accounts Payable. "Processing a stack of vendor invoices used to be a 6-hour process two times per month. Now we pay them electronically and it only takes about 30 minutes," according to Greg.

More Than Technology

The Platform Technology Advisory -Jensen relationship continues to grow tighter, so much so that Greg has since shifted their tax work over to Platform Technology Advisory as well.

"It's really nice to have a one-stop shop where I can hand the tax, accounting, and technology off to them and focus on other aspects of the business as we continue to grow," Greg says. "I look back now and realize things are much more streamlined and efficient since working closely with Platform Technology Advisory."

Platform Technology Advisors

Platform Technology Advisory

The Platform Technology Advisory team are experts in providing Sage 100 ERP, Sage 500 ERP, Sage ERP X3, and Sage CRM software implementation and support throughout California.
For more information visit **platformtechnologyadvisors.com** or call **(805) 569-9487**.

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