

Wired for Success: How Continental Optronics Transformed with Sage Intacct and Equation Technologies

Customer

Continental Optronics

Industry

Manufacturing

Challenge

QuickBooks was limiting scalability and failing to meet the evolving needs of a growing business.

Solution

Within two weeks, Equation Technologies implemented Sage Intacct to streamline accounting processes & enhance productivity.

Results

- Anywhere, anytime access
- Quick, seamless implementation & training
- Visibility & consolidated custom reporting
- Easily manage multi-entities
- Clear insights into costs
- On demand technical partnership

Connectivity lies at the heart of every successful business. One innovative company backed with an impressive 50 years of cable manufacturing experience gets this and makes it their mission to build custom-length cabling solutions for companies seeking reliable wired connectivity solutions. Continental Optronics, located in Huntington Beach, California, specializes in building precision-engineered fiber optic cables and CAT 6 cables. Their cutting-edge solutions are no doubt transforming the landscape for businesses across industries that depend on a seamless connection to the outside world.

Throughout its history, the company has maintained steady growth. However, as operations expanded, it quickly became apparent their existing QuickBooks software couldn't keep up. Immediately following this realization, they partnered with Equation Technologies to implement a more robust manufacturing software, Sage Intacct, a cloud-based ERP system that offered the scalability and functionality required to navigate their growing multi-entity business.

Navigating the Wired World

Jimmy Gilbreath, President and Lead Engineer, helped to open Continental Optronics. However, within a month, excitement turned to panic when they realized their rapidly growing company was struggling to manage even their most basic accounting needs. With the company up & running and taking orders with no good way of handling their financials, they knew they had to find a manufacturing software solution that could match their pace and scale.

Gilbreath, who had previously worked with Equation at a different company, reached out to the team for help. He stated, "I've always had a real good opinion of them. They are super quick to respond. They jump in and help and solve problems very quickly." Gilbreath continues, "Over all the years, I've had no complaints. They're very fast, easy to talk to and they know what they're doing. They're good." He explained the situation and asked what the quickest way they could get them set up and running properly on a different accounting system.



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From Chaos to Clarity in Systems

After careful consideration, Equation recommended Sage Intacct. Continental also explored NetSuite, but with it being significantly more expensive and taking much longer to implement, they knew it wasn't a viable option.

Continental also explored the Sage 300 desktop version and ultimately decided that while Sage Intacct would cost more, it was worth it. They knew a modern cloud-based manufacturing software ERP system without a server and the maintenance costs that come with it would result in long-term savings. They wanted a system they could access from anywhere, either at home or while traveling without needing a remote desktop or awkward VPNs. Gilbreath states, "I like it being in a web browser. I like that interface. I like all of that. It was a good transition."

True to Equation's commitment, they implemented Sage Intacct in a mere two weeks allowing Continental Optronics to streamline their accounting processes, enhance productivity, and gain better financial controls and clarity. Since the implementation went smoothly, efficiencies were felt almost immediately. "Everything they promised us was met," says Gilbreath.

The Equation Equation

Facing the challenge of not having an in-house accountant and lacking the expertise on how to effectively set up Sage Intacct for their business, they turned to Equation for guidance. Equation flawlessly set up their chart of accounts and showed them how to customize their packing slips to meet their unique business needs.

Recognizing the importance of education, Equation provided the Continental Optronics team with Sage Intacct training designed specifically for them. "Sage Intacct was a lot easier for me. It made a lot more sense, a lot more intuitive. It takes people about 2 weeks [to learn], and then they never look back," recalls Gilbreath on the training they were given. Gilbreath was worried some of the long-term employees might not adapt to the new system, but after only 2-3 weeks Equation had everyone on board and smoothly working in the system.

Even the Controller, Francesco Tognoli, who was, at first, apprehensive about transitioning to Sage Intacct was impressed by the manufacturing software solution and Equation's training. Gilbreath says, "Within two weeks of using Intacct, Francisco completely switched his views. He's never looking back. He's glad we switched to Intacct and is pretty impressed with everything it can do. It does nothing but good stuff when comparing to the old solution, and it's always getting better."

Multi-Entity Mastery

Shortly after implementing Sage Intacct, Continental Optronics opened an East Coast branch in Pennsylvania. Equation jumped in to help configure a new entity in the system, as it was more complex than Gilbreath originally thought. He says, "We never really anticipated having another entity, so we put everything at the Entity level. The new company has the same items and they're buying the same material. Only, they were not able to create those in the system at their Entity level because they were duplicates, but they couldn't use ours because they're private to our entity."

Equation worked directly with Sage to migrate all the items to the top level, so they were accessible by both entities. It was a true game-changer. Gilbreath is thrilled they can do everything they need within Sage Intacct for all their locations without added expenses. They could use the same shipping integration and barcode scanner for their inventory, and now that the new entity is set up and configured properly, it's given them visibility and the consolidated reporting necessary to run a scalable multi-entity business.

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Insights at a Glance

On top of the other benefits, Gilbreath says he and their Controller found another aspect that was more invaluable than they expected: Sage Intacct's reports and dashboards. "The custom reports are pretty easy to create ourselves and are very useful. I use the custom reports all the time, and they go on the dashboard now. I prefer that way over the old page reports - it's way easier to do," says Gilbreath. These tools provide the team with a clear window into the full financial landscape, and at a glance, they can uncover trends, track performance, and make informed decisions. Gilbreath continues, "We used to have the Crystal Reports software, so we used to have Equation create the reports. Now we can do it all ourselves and it's user-friendly and easy to do."

Reporting Revelations

Previously, the Pennsylvania office's assembly kit didn't have the option of showing either the components of the kit or just the part number. With the help of Equation's team, Sage Intacct can now print out a document that shows only the assembly part number or shows the components of the assembly kit. This enables the Pennsylvania office to pull the exact parts they need easily and efficiently from inventory, saving time and money. Gilbreath recalls, "Equation was able to help get that working for us, which was pretty critical. We wouldn't have figured that out on our own, at least not on time."

Equation has made a significant impact on how efficiently Continental Optronics manages its growing business, continually providing value to through Sage Intacct. "We could not have done it on our own. Equation has shown us how to use the Smart Events and the Smart Rules to make the system work better. Some of the stuff is not built out of the box in Intacct, like preventing someone from deleting something," says Gilbreath. He goes on, "Their team has helped make things more secure and work better for us."

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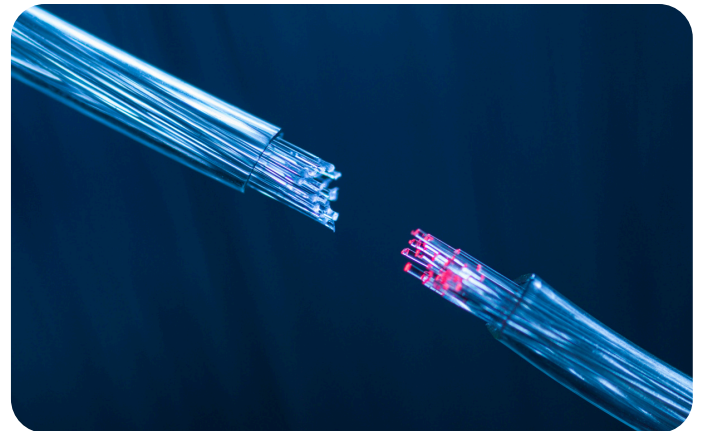
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Partnerships that Power Success

Gilbreath appreciates the flexibility of the ongoing relationship, stating "There's no scheduled help. We just reach out every couple of months when we need something new, and they provide it." The Equation team's accounting expertise and on-demand technical advice have played a pivotal role in Continental's success to date, and the partnership continues to grow. Gilbreath adds, "The Equation people are good people. They're awesome."

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