

# Growing Smarter: Evergreen Herbs Finds the Right Solution with Sage Intacct & Equation

## Customer

Evergreen Herbs

## Industry

Wholesale

## Challenge

Outdated software and manual reporting slowed down multi-entity financial visibility.

## Solution

Equation Technologies implemented Sage Intacct, gaining real-time, consolidated reporting and streamlined financial processes.

## Results

- Increased operational efficiency
- Greater financial visibility
- Real-time multi-entity reporting
- Quick identification of sales and purchasing trends
- Responsive pricing adjustments
- Improved forecasting, budgeting, and reporting with automation

Evergreen Herbs is a fresh herb and specialty vegetable wholesale company supplying full-service and retail customers across Canada. The company also operates farms during the summer season. Founded in 1996 by two brothers, Evergreen has steadily grown, now encompassing multiple business entities, including farms, distribution centers in Surrey, BC, and Cambridge, Ontario, a food processing sister company, and even a junior hockey team – the Surrey Eagles.

With approximately 350 acres of open land and greenhouses and a workforce of 200-250 employees, the company continues to expand operations.

## Outgrowing the Old

As it grew, Evergreen faced increasing challenges with its legacy financial system, Sage BusinessVision. CFO Vivian Ai, who has been with the company for nearly 20 years, described it as outdated and inefficient. She explains, "It wasn't an ERP system. It was a desktop version, and Sage discontinued that software." They even struggled to find a partner to support it.

In addition to becoming obsolete, the team struggled with a solution that lacked full ERP capabilities, consolidated reporting, and required logging into each entity separately. Report formatting was cumbersome, requiring excessive manual edits. Ryan Ho, Evergreen's General Manager, adds, "We want to work on being more advanced, with solutions like AP automation." As a multi-entity business operating across 18 entities, the need for better financial visibility and efficiency was becoming obvious.

## Expertise Over Sales Pressure

Evergreen explored several options – Microsoft Dynamics, Sage 300, and an industry-specific CRM. Sage Intacct stood out with its accounting cloud software capabilities and multi-entity support, making it the best fit for the company's needs.

When evaluating partners, Ryan says, "We interviewed a couple of Sage partners. Equation was one of them, and Brian was one of the first people that we talked to at Equation. He stood out among the comparisons because we liked Brian and his team. They have accounting backgrounds."



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Ryan Ho,  
General Manager,  
Evergreen Herbs

Evergreen's ERP shopping experience highlighted stark contrasts between vendors, with some taking an aggressive sales approach that felt overwhelming.

Vivian describes them as, "Pushy salesmen. Almost on a daily basis. It's too pushy, and we don't like it. In contrast, Brian gave us a demo. It was very professional, and most of the implementation team had an accounting designation. That's what we were looking for. Our previous partner was a computer guy. It was sometimes hard to communicate because they couldn't understand our needs."

Equation's approach, along with their accounting backgrounds, resonated with Evergreen by offering a level of understanding that purely technical vendors could not. For the team at Evergreen, partnering with Equation was the clear choice.

## The Right Fit

After carefully weighing their options, particularly between Sage 300 and Sage Intacct, Ryan says, "Equation explained the differences in specific functionality between systems and because we deal with consolidations and inter-entity, they showed us how Intacct would be more suitable for our needs. That's why we went with it." Trusting Equation's expertise, Evergreen confidently chose Sage Intacct, knowing it was the right accounting cloud software for their operations.

The team understands that implementations are often challenging, however Vivian describes the project as "Very successful, and we're satisfied with their service." "We got through it, and that is what's important. If we

have difficult questions or issues, the team is always there helping us in a fairly quick fashion," adds Ryan.

## Big Wins in Reporting

Now live on Sage Intacct, Evergreen has seen significant improvements in financial management and operational efficiency. The biggest savings are on the accounting side, rounding all the reports and using those reports to help achieve goals, whether it's production, sales, or purchasing.

"For example, on the AR side, right now, we can send a customer a UI statement directly and automatically. Before, we would have to manually download the saved PDF to a folder and then send it to the customer. To compare the old system with Sage Intacct, it's like night and day. It's a big, big improvement," describes Vivian.

With Sage Intacct, financial reports that once took weeks to compile are now available in real time. Ryan explains, "We have weekly management meetings, and Vivian presents those reports to us. For example, 'This needs to be done. That hasn't met the target.' We can utilize those reports to manage things because before, it would take at least a week or two to run those reports. That makes the company move forward a lot faster and better." These management meetings have become more productive and allow leadership to quickly assess sales & purchasing trends and adjust as needed immediately.

## Smarter Pricing, Streamlined Budgeting

The team is enjoying better financial visibility in the accounting cloud software, now that they can see the margin per item in detail. "We can avoid overstock and decrease the shrinkage. We can operate with the sales team now. They will review pricing and say, 'Is that because our pricing is too low?'" Ryan says.

Evergreen can respond faster and make quick price adjustments by doing more reporting and gaining insights into the numbers instead of spending time manually creating the numbers. Vivian continues, "We can also see the profit margin per customer. We compare purchases and sales for a customer. That also helps us when we do pricing."

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Vivian Ai,  
CFO, Evergreen Herbs



Another valuable change with Sage Intacct is seamlessly comparing actual financials against budgeted figures. "Intacct allows us to do an actual versus the budget report. This is a world of benefit for us. Before, we couldn't generate that, and everything was manual. The budget was manual, and we needed to input that data. Right now, we can import the budget and then run the actual versus budget report," says Vivian.

With this automated budgeting and reporting, what was once a tedious manual process has become a streamlined, insightful tool for better financial decision-making.

## Fast, Personal, and Reliable

Equation's quick response to support requests has been instrumental in Evergreen's success. "In terms of support, I would say it's excellent. We were concerned about the ticket system; maybe it will take a while to get a response or maybe a delayed process. But actually, so far, every time we send a ticket, it's like in an hour, sometimes even in 10 minutes, and they already have a tech there, and they start working on it and keep following up. So, I would say the support in service is exceptional," Vivian enthusiastically states.

Equation's dedicated support provides Evergreen with familiar experts who understand their business, unlike other vendors where issues are passed around from person to person, draining energy and time. She continues, "It's an 'A' for us. We always get service, so that's the part I like. I like it because they know our system. They know our company."

## Ongoing Optimization

Recognizing its future importance, Evergreen is in the early phases of automation. With Equation's support, they've integrated EDI and have immediate plans to leverage Sage Intacct's AP automation to improve financial operations, reduce paperwork, and streamline bill processing. Vivian is confident it will be transformative based on the success they've achieved to date.

She says, "It's basically Equation leads, we follow. That's what we want because we are new to this software. We want everything set up and properly. We have no clue sometimes. That's why we need to rely on Equation's instruction and their guides."

Ryan continues, "They [Equation] don't just make you watch a tutorial video. Some companies just try to sell you the product, but they don't listen to what you need. They don't teach you how to utilize the product. That's not Equation."

The move to Sage Intacct, with Equation as a trusted partner, has been great for Evergreen. The combination of better reporting, improved efficiency, and top-tier support has allowed the company to make faster, more informed decisions.

For Evergreen, the difference is a complete transformation, and with Equation by their side, they are well-equipped to continue growing operations. Ryan finishes by saying, "They're professional. They are great at customer service. They are friendly, and whenever we need help, they are right there."

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