

# Sage Simply Accounting | Customer Success

## Heritage Family Services Ltd. is Right at Home with Sage Simply Accounting Enterprise

For 35 years, Heritage Family Services Ltd. has been serving the needs of individuals and families in picturesque Red Deer, Alberta. The organization primarily supports First Nations communities with residential programs, foster home coordination, and community outreach initiatives. Heritage Family Services runs a lean and efficient operation, committed to using its resources to support its mission. Sage Simply Accounting Enterprise is the accounting solution Heritage Family Services selected to help it meet its commitment to its clients, vendors, and employees.

### One Choice. The Right Choice.

“We have been using Sage Simply Accounting Enterprise since 2009, and it has made all the difference,” says Maynard Dueck, manager of service and development for Heritage Family Services. “Before that we had a DOS-based program that was only accessible by two employees. We knew we needed modern accounting software that would facilitate communication and collaboration between us, but we needed it to be easy to use and affordable as well.”

The organization’s accounting firm recommended Sage Simply Accounting Enterprise, an easy-to-use, cost-effective business management solution for small and growing organizations like Heritage Family Services.

“We completely trust our accountant and agreed with their recommendation,” explains Dueck. “It has been a very good decision for us.”

Currently five of the organization’s staff members are able to access and use Sage Simply Accounting Enterprise on a daily basis. With support for up to 20 users, the organization is confident that its future growth and expansion will be easily supported by the software.

### Insight Into Operations

While the organization’s primary goal for implementing Sage Simply Accounting Enterprise was to meet its core accounting needs, Dueck notes that there are benefits that go far beyond basic accounting. “We have opened up our database for analysis and review,” he says. “We can get answers to questions about our operation that we didn’t even have the time to think of before.”

The organization has streamlined and tightened its operation with help from Sage Simply Accounting Enterprise. “We have eliminated much of the paper pushing that used to be necessary with the old system,” Dueck says. “And now because we all have access to the system, we are seeing greater collaboration between the staff. Efficiency gains are apparent too, as we are working with and basing our decisions on up-to-date data.”



### CUSTOMER

Heritage Family Services Ltd.

### INDUSTRY

Social Services Organization

### LOCATION

Red Deer, Alberta

### NUMBER OF LOCATIONS

5

### SYSTEM

Sage Simply Accounting

### CHALLENGE

When Heritage Family Services decided to replace its outdated accounting software package, it sought an easy-to-use, affordable, and full-featured solution.

### SOLUTION

Sage Simply Accounting Enterprise was recommended by the organization’s accounting firm and has proven to be an excellent choice for the busy operation.

### RESULTS

Access to accurate real-time data helps the organization perform daily budgeting allowing it to make the best use of its resources. Efficiency gains allow more staff time to go toward mission-supporting rather than administrative functions.

## Access to Decision-Making Data

Enhanced reporting features in Sage Simply Accounting Enterprise have enabled the organization to develop a report they can use to set staffing levels. “We operate with a client/staff ratio of one-to-one,” Dueck explains. “So we need to ramp up our staff when we receive new contracts for service.” The report, which can be generated as needed, delivers the information management needs to ensure the organization is strategically staffed. Similarly, the data delivered is used by the organization to increase its marketing communication efforts when its analysis shows that additional program space is available.

Accurate budgeting is especially important to Heritage Family Services during this period of ever tightening budget limitations. Thanks to the level of detail supported by Sage Simply Accounting Enterprise, daily budgeting is now possible. “We look at historical expenses for items like groceries, fuel, insurance, and house maintenance in conjunction with our daily client count to establish a daily budget,” explains Dueck. “Timely information like this helps us make strategic decisions about our programs and our organization.”

The organization now uses information available to help it set fair billing rates by providing timely, accurate comparisons of revenue and expenses. “With the old system, we might have lost money for the whole month before we were able to run the reports we needed and see where we stood,” Dueck notes. “Now we are able to react quickly and take steps to keep the organization on solid footing while providing the best value to our clients.”

## Outstanding Product Training and Support

After the initial implementation, staff at Heritage Family Services availed themselves of the online product training offered by Sage. Both live, real-time, and recorded anytime training sessions are available. “The training quickly got us all up to speed and productive with the software,” recalls Dueck.

Heritage Family Services takes advantage of the Sage Business Care Gold support plan, which includes updated releases of the software as soon as they are available. The organization’s staff have phone and online access to Sage Support Specialists to answer their routine and specific product questions.

“Sage customer service is outstanding,” says Dueck. “We receive very rapid responses to our questions and they offer recommendations for ways we can make even better use of the software,” concludes Dueck.

“Now we are able to react quickly and take steps to keep the organization on solid footing while providing the best value to our clients.”

Maynard Dueck  
Manager of Service and Development  
Heritage Family Services

## About Sage Simply Accounting

Sage Simply Accounting is the #1 choice of Canadian small businesses and accountants<sup>1</sup>, used by more than 500,000 Canadian businesses. Developed in Sage’s global research and development centre in Richmond, B.C., the fully bilingual Sage Simply Accounting software is known for its easy to learn, easy to use approach to accounting while providing the most comprehensive features that small businesses require – from start-up through to maturity. Sage Simply Accounting is supported by a highly trained team of customer service specialists in our Richmond, B.C. centre, and by 10,000 consultant partners located in communities across Canada who help thousands of companies daily to manage their business more effectively with Sage Simply Accounting.

For more than 20 years, Sage Simply Accounting has lived up to its name by providing simple to use award winning features for Canadian small office/home office users, coupled with world class customer support and training to help them better manage their day-to-day operations.

Sage Simply Accounting is developed by Sage Software Canada, Ltd., which is a part of the North American subsidiaries of The Sage Group, plc. Sage began not as one company, but as the efforts of many entrepreneurs who built their successful products and businesses with a sincere focus on their customers. Today, our company represents the culmination of that combined entrepreneurial spirit, drive, and vision.

<sup>1</sup>Based on independent surveys of 275 Canadian small businesses conducted 2/2011 and 401 accountants who work with small business clients, conducted 6/2011.