

CUSTOMER SUCCESS



## ChevronTexaco Lubricants Keeps Its World Moving With Sage PFW

CGF Industries, Inc., is a private holding company that manages the consolidated interests for one of the leading families of Wichita, Kansas. Corporate assets are diverse, and include Dunbarton Corporation, makers of steel frames and doors; VizWorx Inc., a professional color and digital imaging lab; and ScripMaster, a pharmacy management solution. CGF also manages several trusts and investments in the hospitality industry.

### Consolidating Operations Under One System

Prior to 1998, CGF's holdings had been managed separately. Consolidation under a single umbrella brought increased legal reporting requirements. Financial activities of each company now had to be presented in a consistent and integrated manner.

The various entities had previously used accounting packages that were inadequate for handling the new holding company's reporting needs. By early 1999, CGF decided on Sage PFW ERP, the award-winning financial application package for PC-based networks. Running on an application server rather than client workstations, Sage PFW increases productivity and improves performance by providing robust functionality in a familiar Microsoft Windows graphical environment.

### Low Maintenance and High Performance

Sage PFW proved to be an ideal answer for CGF Industries, where it now supports 39 different entities. The new system takes care of all financial processing and tracking, such as balance sheet, income, and cash flow statements and profitability analyses. It provides accurate information for treasury management, integrates with a full-featured database for budgetary purposes, and offers a wide variety of reports.

"The intercompany reconciliations we have to perform as a multifirm service division are all automated now within Sage PFW," explains Cindy Ascanio, assistant controller at CGF. "Allocations are remarkably simple through the Sage PFW chart of accounts. We can assign fees and management charges exactly the way we want, which helps immensely for settlement purposes. If the holding company pays everyone's insurance, for instance, reimbursement amounts are calculated automatically. This is something we were never able to do before."

**Customer:**

**ChevronTexaco Global Lubricants  
Canada**

**Industry:**

Lubricants marketing, packaging, and distribution

**Location:**

Ontario, Canada

**Number of Locations:** Five

**Number of Employees:** 100

**System:**

**Sage PFW**

- Accounts Payable
- Accounts Receivable
- Bank Book
- Crystal Reports®
- Microsoft FRx
- General Ledger
- Inventory
- Multi-Currency Manager
- Purchase Order
- Sales Order

**CHALLENGE**

Culture of ongoing expansion required very flexible, scalable, and easy-to-modify business system with customizable parameters.

**SOLUTION**

Sage PFW ERP with full suite of business modules, including Multi-Currency Manager.

**RESULTS**

Supports a full spectrum of business operations while company's size tripled over three years; processes 3,000 transactions a month and has eliminated need to hire two more full-time employees.

Ascanio appreciates the audit trail provided by Sage PFW, which lets her perform research and follow transactions back through time. "The audit trail feature is especially helpful when our external auditors have requests about specific items," she says. "I can trace transactions from module to module within the system with no difficulty at all."

She also likes the flexibility of being able to export Sage PFW reports to other software packages like Microsoft Word or Excel. She frequently sends portions of reports by e-mail, saves them as text files, or otherwise manipulates data for presentation in different formats.

Having worked with many different systems in her 14 years of accounting, Ascanio comments that Sage PFW is much more user-friendly than its competitors. Its built-in error proofing alerts her whenever an invalid account number is entered for instance, and flags issues before they can turn into problems.

"I recommend Sage PFW for small to medium-sized companies as a cost-efficient solution to accounting needs," says Ascanio. "It facilitates my job by automating all common functions, and allows me to manage our finances with a minimum of manual intervention."

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*"PFW lets us keep infrastructure to a minimum, realize significant savings in IT, and avoid hiring at least two full-time employees in procurement and fulfillment. Because of the product's modularity, flexibility and superb engineering, it should be able to accommodate us for years to come."*

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## ABOUT SAGE SOFTWARE

Sage Software supports the needs, challenges, and dreams of more than 2.7 million small and mid-sized business customers in North America through easy-to-use, scalable, and customizable software and services. Our products help manage a complete range of business functions including: accounting, operations, customer relationship management, human resources, time tracking, merchant services and the specialized needs of the construction, distribution, healthcare, manufacturing, nonprofit, and real estate industries.

