

CUSTOMER SUCCESS



Westwood Insurance Chooses Sage MAS 500 for Integration Capabilities

Over the decades, Westwood Insurance has been there for individuals, families, and homeowners. They've made a commitment to be there for their customers through thick and thin. Their complete dedication to providing the best in personalized insurance services sets them apart. With their unique blend of good old-fashioned service and good business practices, they've quickly become one of the nation's largest independent insurance agencies.

Taking the Necessary Steps...

For 10 years, Westwood Insurance had been using an off-site service bureau for all accounting, financial, and insurance data management. In 1996, the rapidly growing division of the century-old company decided to bring its systems in-house in order to improve productivity and cost-effectiveness.

Concurrently, the firm shifted to the Microsoft Windows environment on a Windows NT network. Westwood Insurance selected insurance agency management software that was compatible with its Microsoft SQL Server environment. Although the insurance application provided capable insurance management functions, Westwood Insurance found its financial components underpowered. The software's reporting, general ledger, and vendor accounts payable sections lacked many of the capabilities that the company had sought.

To Ensure Success

Westwood Insurance conducted a careful assessment of high-performance accounting software applications. "We evaluated Sage MAS 500 and two other accounting programs, and concluded that Sage MAS 500 ERP from Sage Software was the best fit for us," says Greg Lewis, Vice President of Information Services at Westwood Insurance. The decision was largely influenced by the system's accessible architecture, which enabled rapid development of bridges to integrate its General Ledger and Accounts Payable modules with Westwood's insurance management software.

Customer:

Westwood Insurance
(formerly Weyerhaeuser Insurance)

Industry:

Insurance Services

Location:

Sherman Oaks, California

Number of Locations

Six locations in four Western states

System:

Sage MAS 500

- eExecutive
- General Ledger
- Accounts Payable
- Cash Manager

CHALLENGE

Obtain a powerful financial solution that integrates seamlessly with insurance management systems and other industry specific programs.

SOLUTION

Sage MAS 500 financial solutions.

RESULTS

Speedy Implementation; streamlined integration of systems and seamless data flow; exceptional reporting and data export capabilities.

Lewis also notes that the design integrity of Sage MAS 500 and its compatibility with the Windows operating platform weighed heavily in the company's decision. "Sage MAS 500 is designed in Visual Basic as a native 32-bit application, and is SQL Server-based," he says. The other accounting software packages that Westwood Insurance found unacceptable were developed for the 16-bit Windows operating system.

The product's 32-bit technology allows Westwood Insurance to take full advantage of Windows capabilities. "Sage MAS 500 is built for current versions of the Windows operating system, not the older 16-bit systems, so it is much more efficient," observes Lewis.

While installation of some client/server accounting software systems traditionally consumes months, Sage MAS 500 was brought into service at Westwood Insurance in a remarkably short time—less than two months. The project went smoothly for two reasons: its true client/server architecture and its development by means of industry-standard Microsoft tools.

Sage MAS 500, which is designed to be truly Microsoft-compliant, integrates with other programs within the enterprise because it's native to the Microsoft SQL Server environment. With Sage MAS 500, emerging technologies can be easily integrated as customer needs change.

Evelyn Moran, Westwood Insurance's controller, praises the suite's reporting capabilities. "It provides greater flexibility and data export capabilities," she says. "Sage MAS 500 includes a powerful financial report writer, which I use to design my own reports easily."

She says the product has given her the ability to integrate accounting and insurance data, which never was achievable through the service bureau. "Sage MAS 500 lets us take full advantage of other Microsoft Office products like Excel and Word, for example, which significantly increases our data exchange capabilities," Moran explains.

Greg Lewis adds, "Sage MAS 500 is far and away the best solution we could have chosen. It will be Westwood Insurance's accounting foundation 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.

