



Topic: Platinum for Windows with customization

Company: Swanson Group

Company Background:

Swanson Group, Ltd is a sales representative company lime and limestone products, brokering to customers in various industries, primarily in steel manufacturers. Business offices are located near downtown Pittsburgh, in Carnegie, Pennsylvania. Swanson Group manages the flow of the product from the supplier to the customer. Other business functions include the collection and remittance of invoices and payables.

Drive to Change Systems:

Swanson Group was running a DOS-based accounting system that was not year 2000 ready. They needed to upgrade to a Windows-based system. However, Swanson Group found that they had many specific needs that could not be handled by any standard accounting package.

- Inventory items are designated and priced for a specific company. The ability to verify that an item is being sold only to the customer for which it is designated was important.
- Customer and vendor information are part of the item key at Swanson Group. When a vendor or customer name changes, the item key also changes. Therefore, they needed the ability to change an item number.
- It was also important to incorporate shipping weights and ticket numbers on AR invoice

Some functionality was needed to ensure that Swanson Group could maintain a streamlined business process. These included:

- Ability to create an AP voucher from a Sales Order.
- Ability to schedule recurring orders/multiple release dates without duplicate order entry
- Ability to create separate invoices from each line item of a sales order, or combine several line items onto one invoice
- Ability to automatically select a voucher for payment when the corresponding sales order has been paid

The Solution:

Although Platinum for Windows offered many of the capabilities Swanson Group needed, not all of their specific needs could be met using PFW (or any other accounting package) without customization. It was determined, therefore, to use the functionality of Platinum for Windows along with a Microsoft Access custom program to meet their needs. Because both programs are Windows-based, they are able to switch back and forth between the two programs.

In a typical day, Swanson Group will:

- Enter a new Sales Order in Platinum for Windows.
- Verify that all Sales Orders are using inventory items appropriate for the customer, using the Custom Routine.
- Select invoices for shipping in Platinum for Windows.
- Print Invoices on a custom designed form, in the Custom Routine.
- Create AP Vouchers from the invoice line items automatically using the Custom Routine.
The Custom Routine "knows" which vendor the inventory item is purchased from, looks up the cost from the inventory maintenance files, and created the voucher.
- When the Sales Invoice is paid by the customer, the Custom Routine selects the corresponding voucher for payment. The check is then generated in Platinum for Windows.
- New inventory items are regularly created. The Custom Routine allows Swanson Group to clone an existing item into a new inventory item number.