

# Zag Zaps The Accounting Busywork With Microsoft Dynamics GP From NexTec Group



*"Thanks to the efficiencies we've gained, we can grow the business significantly without investing in more staff. NexTec Group familiarized themselves with our business—down to the terminology we use. I was impressed with their responsiveness, their talent, and their expertise."*

**Brent Byrd**  
Director, Accounting

The price haggling that typically accompanies the purchase of a new car is nobody's idea of fun. Zag is on a mission to change that. This innovative company partners with the most trusted brands and membership organizations in America to deliver an internet auto marketing experience that promises to transform the way Americans buy their cars.

Affinity partners such as AAA (American Automobile Association), Capital One, United Services Automobile Association, and Upromise turn to Zag to deliver the Web technology their members use to select a model, enter options, and obtain a fixed price quote. Those members then take the quote to one of Zag's network of preferred dealers to complete a stress-free transaction.

Keeping this business model running on all cylinders takes a powerful, flexible, integrated business management solution and a strategic partner to back it up. Zag has found that combination in Microsoft Dynamics GP and NexTec Group.

## **A Bump In The Road**

Zag earns revenue from dealers when a sale is finalized. In turn, it pays commissions to the affinity partners. Not long ago, Zag relied on QuickBooks accounting software to track these transactions, but as the business grew, QuickBooks was no longer a viable solution.

"We had outgrown the software," recalls Brent A. Byrd, director of accounting for Zag. "We had to match up each lead with a sale before we could generate an invoice to our dealers, and we had up

to a couple hundred of these to complete each day. There was too much manual effort, and too much room for error or oversight. In addition, our database has become so large that it was unstable."

## **Bring In More Horsepower**

The CFO at Zag had worked with NexTec Group previously and trusted the firm's advice. "We met with NexTec Group and laid out what we were looking for," explains Byrd. "They studied our



NexTec Group delivered a high-powered customized solution that keeps Zag in the driver's seat.

operation and came back with the recommendation of Microsoft Dynamics GP."

The ability to customize Microsoft Dynamics GP was attractive to Zag, as was NexTec Group's expertise in adapting the software to meet the needs of its customers. "It is a customizable solution with great

integration capabilities, and NexTec Group has a detailed understanding of the software and the ability to turn it into an ideal solution for us."

## **Eliminate Manual Processing**

NexTec Group first tackled the integration between Zag's sales matching software and its new accounting system. "Previously, we would export the invoice data from our sales matching software and then import the invoice transactions into QuickBooks," Byrd says. "On a busy day, or if something with the data file wasn't quite right, the process could take up to two hours to complete."

NexTec Group automated the import process, eliminating the need for any manual handling of the data files. "Now, every half-hour, the system looks for the data file and then imports the data

and creates invoices automatically,” Byrd explains. “It saves us up to two hours each day.”

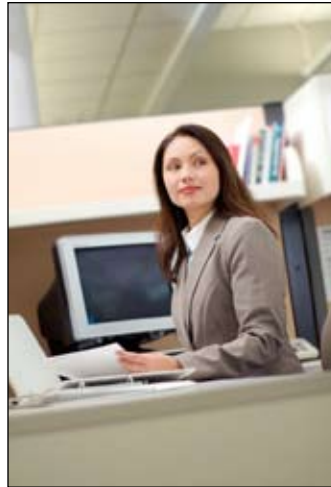
To streamline the calculation of commissions that Zag pays to its affinity partners, NexTec Group designed the routine to gather raw data during the import and generate an accounts payable invoice in Microsoft Dynamics GP. With over 2,000 invoices per month generated, this integrated solution provides a huge time savings by automatically calculating and processing amounts due to each partner. And that time savings comes when it is needed most — during the month-end closing process.

NexTec Group was able to utilize technology to eliminate another manual step for Zag. The company’s sales representatives use Salesforce.com, a popular customer relationship management (CRM) system, to manage dealer relationships. Previously, when a new dealer was added in Salesforce.com, the dealer had to be manually added to QuickBooks and then linked back to the corresponding record in Salesforce.com.

NexTec Group eliminated this step by configuring Microsoft Dynamics GP to collect new dealer information from the CRM software and automatically create new customer records in the accounting software. “It saves us time and keeps our databases in sync. Records are automatically linked so that a change to the dealer information in one system updates the other,” Byrd says.

#### **Strong Core Accounting**

In addition to delivering the specialized processing capabilities unique to Zag, NexTec Group delivered a solid, core accounting solution that Zag can depend on for years to come.



By eliminating manual processes, Zag can continue to grow without adding additional personnel.

Accounting data from QuickBooks was migrated into Microsoft Dynamics GP, including dozens of user-defined-fields, facilitating a fast and easy transition and maintaining Zag’s transaction history of its customers and vendors.

Checks are printed on blank check stock for security and convenience, complete with MICR encoding. Numerous invoice formats are used, depending upon the customer and type of contract. NexTec Group deployed Liaison Messenger, an automated forms server for Microsoft Dynamics GP that intelligently selects the proper form to use depending on various attributes, and will then print, e-mail, and digitally archive the invoices.

#### **The Road Ahead**

Zag is now in a position to continue its growth track, without the need to add additional administrative and accounting personnel. “Thanks to the efficiencies we’ve gained, we can grow the business significantly without investing in more staff,” says Byrd.

“NexTec Group is a dedicated team of professionals,” Byrd concludes. “They familiarized themselves with our business, down to the terminology we use. I was impressed with their responsiveness, their talent, and their expertise.”



[www.nextecgroup.com](http://www.nextecgroup.com)

[info@nextecgroup.com](mailto:info@nextecgroup.com)

**NEXTEC GROUP—Southern California**  
11500 West Olympic Blvd. Suite 590  
Los Angeles, CA 90064  
(310) 479-7701

**NEXTEC GROUP—Pacific Northwest**  
1619 8th Avenue North  
Seattle, WA 98109  
(206) 505-7980

**NEXTEC GROUP—Houston**  
1111 North Loop West, Suite 810  
Houston, TX 77008  
(713) 957-8350

**NEXTEC GROUP—Cleveland**  
3918 Clock Pointe Trail, Suite 101 & 102  
Stow, OH 44224  
(330) 928-7300

**NEXTEC GROUP—New York**  
245 Park Ave-39th Floor  
New York, NY 10167  
(212) 372-8999

**NEXTEC GROUP—New Jersey**  
300 Harmon Meadow Blvd., Suite 440  
Secaucus, NJ 07094  
(201) 933-0707