



# HRE Wheels Gains Performance with Equation Technologies

## Customer

HRE Performance Wheels

## Industry

Manufacturing

## Challenge

System limitations restricting HRE Wheels ability for growth

## Solution

Equation Technologies migrated HRE Wheels to Sage 300 resulting in better integration capabilities

## Results

- Integration to custom manufacturing software
- Saved time and greatly reduced the amount of data entry
- Timely business decisions
- Better managed cash flow

Integration with custom manufacturing application has saved HRE Performance Wheels time and data entry. As a manufacturer of after-market automotive wheels, HRE Wheels is a leading provider of custom wheels for high-end luxury cars." While most of their business is in the U.S., HRE Wheels are sold internationally as well. From their Vista, CA corporate headquarters, which also includes a manufacturing plant, HRE Wheels makes to order wheels and distributes the final product to retailers, distributors and boutique shops worldwide.

While the wheels made by HRE are known for their high performance, the business management software they were using was not. Limited by integration, reporting, customization and flexibility, HRE Wheels' VP Finance and CPA, Karen Gilmore, knew they needed more to keep orders.

## Searching for a System and a Partner

"We knew what we were currently using had its limitations," said Karen, "In order to be more efficient and grow our company, we knew we would need to look at a more robust system." Having successfully completed a half dozen system implementations and data conversions in her career, Karen started out searching for a product and firm that could help HRE Wheels achieve their objectives.

"We wanted to find someone who was knowledgeable about the product, as well as manufacturing and accounting. Just because someone knows the software, does not guarantee that they will do a good implementation," said Karen. "I've done enough implementations to know the importance of product knowledge balanced with industry knowledge. I knew to be successful we would need to make our decision based on the firm we were hiring for implementation and support, their knowledge of the product and overall business process intelligence." HRE Wheels found Equation Technologies on the Web, contacted them and set up a meeting. "As soon as we met with Equation Technologies they really impressed me with not just the product knowledge, but also their technical and accounting knowledge. Right away I knew hands down this was the firm we should work with," reflects Karen.



## Conversion and Implementation On Time, On Budget

Now that the firm and product were selected, it was time to get to work. "With Equation's help, we brought over two years of GL history and revised the chart of accounts," said Karen. "We had an implementation budget in place and managed to always stay on track. Equation was able to do things remotely so travel time was not incurred, saving time and money. We were able to work on the project a few hours each day so it would fit into the rest of our staff's day." Hands-on training was done at HRE Wheels' office and used live data. "Our entire team felt very confident with the new system after the training," said Karen.

## Integration to Custom Manufacturing Software

At the same time as the software implementation, HRE Wheels also implemented a custom manufacturing software application. "Because our manufacturing and order entry system is custom built, we needed a flexible system with which to integrate. We enter orders into the custom manufacturing software and the order then moves to the shop floor to get built," said Karen. The challenge was that information needed to be tracked in both the custom manufacturing and Sage 300 applications. However, HRE Wheels did not want to have to manually key in all the data in two systems due to lengthy reconciliation time. Again, with the help of Equation Technologies, a solution was found.

"We maintain inventory and sales data in the custom manufacturing program. Every night a batch is sent to Sage 300 and updates the accounts receivable module for invoicing and updates the general ledger module for inventory purchase receipt. This process is great. All my detail comes into the accounts receivable module so we have all the customer information as well as history in one place. This allows us to post our cash receipts in Sage 300," said Karen. "We did explore trying to use Sage 300 modules. However, after discussions with Equation, we decided that the best option was to write a batch routine and move the information over nightly between the two systems. We felt that this was the best choice for us as a company."

Another advantage of the integrated system is with cash receipts. "Cash receipts happens real time and occurs in Sage 300 and is automatically transferred to the manufacturing software. This makes our salespeople more self sufficient as they are able to look up cash receipts themselves without the help of the AR staff. This also results in better customer service since the information is at the salesperson's fingertips. We will not start a new order until we have a deposit, so timing of moving the order to the shop floor is critical. We can't lose a day waiting for a nightly batch," said Karen.

"Another area we have improved is with purchase orders. Purchase orders are entered in the manufacturing software and every night the receipts come over to Sage 300 in a batch. This provides a good system of checks and balances," said Karen. "When the receipts come over to Sage 300 ERP we can verify that the invoices match the purchase orders. This has been helpful in catching data entry errors and satisfying outside auditors that we are meeting certain controls."

## Results Achieved with Sage 300 and Equation Technologies

"We were doing so many things manually before we implemented this solution. It has saved time and greatly reduced the amount of data entry," said Karen. "We were doing financial reports in Excel and again there was a tremendous amount of manual entry. Now, I just run a report, there is no more waiting for me to compile data into a spreadsheet. Management can receive financial data immediately, which allows us to make better, timely business decisions."

*"All my years of doing implementations, I never had an implementation on budget or got all that I wanted. Equation really listened to me and took time to understand what was important to our business. I am sure that this contributed to the success of our company."*

Karen Gllmore, CPA  
HRE Wheels, Vice President Finance



HRE Wheels took advantage of Equation Technologies' knowledge and customization experience. "We did some customization to match our business processes," said Karen. "For example, we added a look-up box in accounts receivable that would match the open sales order number to the cash receipt. This prevents data entry errors." In addition, reporting was improved. "We were able to change existing reports to match the way we do business. For example, we are able to ensure that we don't ship anything to customers who owe us money. This allows us to better manage cash flow."

"I could not believe that we did as much as we did. I got everything I asked for while working with one firm, Equation Technologies," said Karen.



*"We were doing so many things manually before we implemented <Sage 300>. It has saved time and greatly reduced the amount of data entry. Management can receive financial data immediately, which allows us to make better, timely business decisions."*

*Karen Gilmore, CPA  
HRE Wheels, Vice President Finance*



**United States** 533 2nd Street | Encinitas, CA 92024

**Canada** 220 Brew Street, Suite 301 | Port Moody BC V3H 0H6

866.436.3530 | [info@equationtech.us](mailto:info@equationtech.us)