

# Equation Technologies and Sage 300 ERP Serves The Fish Market Well

*The Fish Market found a new partner with Equation Technologies who was able to upgrade them to a current version of Sage 300 ERP and make automation recommendations that save 10 hours a week.*

For three decades, The Fish Market has been serving up the highest-quality seafood available at a fair and honest price. From its birthplace in Palo Alto, CA, The Fish Market has grown to nine restaurants throughout California and Arizona. The Fish Market features an oyster bar, a retail seafood market and a casual dining atmosphere.

The Fish Market had been using an outdated version of Sage 300 ERP for a number of years and it came time to upgrade to the current Windows version. Not comfortable with their current support provider, they sought out Equation Technologies to help with the upgrade. “We kept having system glitches,” said Debbie Gahan, Controller at The Fish Market. “The upgrade went well and Equation Technologies made sure everything was working. We were up and running very quickly.” Taking advantage of the new features available in the current Windows version, and a partner they could rely on, The Fish Market made some significant improvements to save time and money.

## Improved Efficiencies

“We use Sage 300 ERP for the general ledger and the accounts payable functionality. Each of our locations has some on-site accounting responsibilities including balancing cash and entering payables,” said Debbie. “We process checks and financials from a central office in San Diego.”

Each store would enter their restaurant’s bills on a spreadsheet to send it in to the central accounting office for the check to be processed. Once in the central office, the

bill would be re-keyed into Sage 300 ERP.

The Fish Market wanted to eliminate the duplicate entry of accounts payable. Working with Equation Technologies, The Fish Market set up remote access to Sage 300 ERP. “Now the bookkeepers can enter the bills directly into Sage 300 ERP,” said Debbie. The central office approves the batch of bills and checks are processed. This has saved time in both the local and central offices. “In our central office, we have saved on average 10 hours a week in addition to paying employees overtime for the extra data entry work,” said Debbie. The local offices also have access to look to see when invoices are paid. Access is secure and was set up by Equation Technologies.

## Multiple Companies

Each restaurant is set up in Sage 300 ERP as a separate company using the multiple

### Value of Working with Equation Technologies

- Saved 10 hours a week on data entry
- Balanced intercompany accounts
- Presented options
- Excellent responsiveness





*"We are more efficient due to our relationship with Equation Technologies."*

*– Debbie Gahan  
The Fish Market, Controller*

company database functionality. However, at times it is necessary to create entries that affect multiple companies. "Occasionally one restaurant will pay an invoice for multiple restaurants. This created several posting entries to be made at the restaurant level," said Debbie. Using the Intercompany function, an invoice can be paid from one restaurant and the expense split up among multiple locations. "We are more accurate because we are not waiting for multiple restaurants to make entries, it all happens at once," said Debbie. "Our intercompany transactions are now automatically balanced." Since the entries are all made simultaneously, it reduces the time that each restaurant has to spend making the entries.

#### **Reporting**

Within the restaurant business, there are key financial metrics that are reviewed such as sales per hour and sales versus last year. Using F9 Financial Reporter, The Fish Market is able to take data housed in Sage 300 ERP and pull it out to a spreadsheet-like format. Equation Technologies helped to customize the reports so they could compare metrics from restaurant to restaurant. This helps The Fish Market know what is reasonable to expect in terms of their metrics and helps to control costs.

Other customized reports identify trends at the restaurants. For example, if guest counts are down, The Fish Market may look at competition in the area, increasing advertising or adding new specials to the menu to attract diners.

#### **Relationship with Equation Technologies**

"We like working with Equation Technologies because they were very good at listening to us and understanding

our whole business. They looked at everything and presented us with options as opposed to just telling us what we should do," said Debbie. "They are always very prompt in responding to whatever we need."



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