



Case Study

"We love working with DFC. Their customer service is outstanding and everyone there is very professional, courteous and always looking out for their customers."

Clarence Sitter
CFO
*Theodore Roosevelt
Medora Foundation*

Customer Profile

The Theodore Roosevelt Medora Foundation is a non-profit organization working to preserve the badlands and boost tourism and interest in the region.

Business Solution

Microsoft Dynamics GP is a cost effective in-house alternative to their previous outdated program.

Benefits

- Scalability
- Inventory
- Security
- Support
- Ease of Use

Demographics

Industry: Not for Profit
Employees: 45 year round employees
325 seasonal employees
GP Users: 7
Revenue: \$10-15 million

Theodore Roosevelt Medora Foundation

Situation

The Theodore Roosevelt Medora Foundation (TRMF) is a non-profit organization that operates in the North Dakota badlands. The foundation is made up of two separate companies; Bully Pulpit Inc. manages lodging, camping, a golf course, retail stores and other attractions while the Theodore Roosevelt Medora Foundation manages the summer musical, museums and food establishments.

Prior to 2004, they had been utilizing Solomon 2.06, which didn't offer them the reporting capabilities or the information they wanted. Its difficulty to learn and navigate was also a set-back. Each facet of the business also was utilizing a different software system, or none at all. Inventory was done manually and no registers or computers were networked together.

TRMF was entering tax updates manually and were attempting to track accrual of vacation and sick time manually as well.

Solution

In 2004 TRMF implemented Microsoft Dynamics GP because it allowed them to streamline a majority of the segments of their business into one software program. They also needed to make sure the financial/ ERP system they chose was user friendly and could handle their growth in the future.

They were soon able to rerun one or two checks rather than a whole batch, received automatic tax updates, tracked inventory, and could run reports to see how many seasonal employees returned each year. GP was the solution to nearly all of the issues they had been having.

Ongoing Success

Ten years later and Theodore Roosevelt Medora Foundation is still utilizing Microsoft Dynamics GP. As their businesses, properties and number of employees rose over the years, GP was able to grow with them and fulfill their changing needs. Since 2004, they have added 15 year-round and 75 seasonal employees.

Their current CFO, Clarence Sitter, started in 2012 and was introduced to GP for the first time. His initial thought was that the system would be complex and difficult to learn. After a week he realized that wasn't the case at all.

Products

Microsoft Dynamics GP

- Financial Management
- Purchasing
- Human Resources
- Payroll
- Intercompany
- Forecaster
- Management Reporter
- Greenshades

Although training classes were available, Clarence was able to learn the system on his own through its easy navigation.

They currently manage their finances, including accounts payable, human resources and payroll through GP and utilize Forecaster and Management Reporter for their reporting needs. Intercompany allows them to switch seamlessly between their two companies, with simple visual clues that make it easy to quickly determine which company's information the user is viewing.

"GP is easy to navigate and is a great system that's very powerful and can do a lot of things for us," said Sitter.

Each summer, their staff level grows 600 percent compared to the off-season and in order to manage the increase in employees, they hire three accounting interns to assist with deposits through GP. The interns have little to no experience with GP when they start and even with minimal training by the staff at Theodore Roosevelt, they are able to pick up the system right away.

Accounting Assistance

TRMF found themselves dealing with issues in their payroll function after a full time employee left the company and an immediate replacement wasn't available.

They solicited the help of 360 Virtual Accounting, a sister company of DFC Consultants, to assist until they hired a new employee.

"Everyone has been unbelievable to work with. They helped to make sure people were paid on time and accurately," said Sitter.

The accountants from 360 Virtual Accounting worked with TRMF until they were able to hire a new payroll employee. They also provided training and support for the new TRMF team member.

Benefits of Microsoft Dynamics GP

Scalability

TRMF has grown substantially in the last ten years, seeing a 50 percent increase in the number of year-round employees and 30 percent increase in seasonal employees. GP has allowed them to continue to utilize the same software to successfully manage a much larger business.

Security

With manual entry, information could be altered or entered incorrectly. Now they assign appropriate roles based on job positions, protecting their information and securing an audit trail.

Support

Through their partnership with DFC, Sitter and the team have had the ability to talk with GP experts and receive immediate advice and assistance. "I have nothing but great things to say about what Carol and the rest of the team has been able to do for us," said Sitter.

Ease of Use

Thanks to Microsoft Dynamics GP's recognizable interface and ease of use, the team can utilize the system with little to no training.

Seasonal Employee Tracking

The reporting functions in GP helped TRMF to track seasonal employees. The HR department can now reactivate return workers rather than re-enter their information.



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