



Greg Pritzker
Matrix, Inc.
VP, Accounting Operations

Last updated: 2005 Jul 13

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1. The business problem

Well without question the big reason for us to look at a new system was the fact that that we have people in lots of different locations, and the complexity of supporting all those people with a traditional accounting package, it was just becoming too unwieldy. Our big concern though, was that an Internet application wouldn't offer the same kind of functionality that a traditional systems would. I'm glad I was wrong about that. The other issue that drove us in this direction was cost. We thought we could save an IT headcount by going this way.

2. The selection process

Well our company, Matrix, had some very specific requirements for selecting and purchasing items over \$100,000. First we had to assemble a group of people to evaluate the software companies that are out there, and their products, from which we picked 3 companies. Then we talked to customers for each of those final 3. We even went so far as to install one system that we had concerns as to whether the system would be compatible with our old systems. So the whole process started in September of 2001 and we selected Affineon by December.

3. Why BiznessVision?

I would say our IT group has made a significant commitment toward the UNIX platform. And, so this was a big driver for us choosing BiznessVision, since they've been around the longest on this platform. We really liked BiznessVision's implementation story, which included a group of highly seasoned consultants who really understood the accounting application. And the final piece was the pricing model. There really wasn't another vendor who offered such a favorable, logical, pricing model.

4. Favorite attribute(s)

There are a lot of aspects about BiznessVision that I like. We just recently upgraded to their version 8.1, which includes a module for advanced reporting, and I haven't really used it to its fullest extent, but I've already created a number of reports that can be useful for assisting me in filling out other kinds of forms. So I think I've just barely scratched the surface of what can be done with the advanced reporting module. I really like it. I also like the flexibility that comes with BiznessVision, particularly around the payroll module, using the key codes in the general ledger system, because I can generate reports based on those key codes. There's an Excel add-in model that I like too; I used it extensively last year. Being able to standardize on those object codes and program codes, generating reports in a multitude of ways, it's great.

5. Least favorite attribute(s)

Well I would have to say there have been a couple of outstanding issues, primarily with the accounts receivable module, mostly because we can't seem to be able to print reports with it. That's been an issue since version 8.0 was installed. I've talked to Affineon management about that, and I know they're working on it. I haven't followed up with them lately to find out if it's going to be fixed in version 8.1.1. So occasionally, we've run into a glitch that seems to take a little more time to resolve. Fortunately for us, the accounts receivable module isn't a major issue, but eventually I'd like to be able to integrate our billing, and accounts receivable into the system, so that's kind of an open issue.

6. Changes since BiznessVision?



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Well the BiznessVision system allows us to manage our finances much better than our old system. The old way involved juggling hundreds of individual worksheets, tracking updates, managing security and really hoping that nobody overwrote a key formula. There was also the frustration of trying to coordinate activities at multiple locations and not having everything updated in real-time. I think now we're spending more time analyzing information and not just managing the logistics. The allocation management module for example: not only can you program just allocations, but I've also created programming within the allocation management module that will actually go in, with each account, calculate my direct revenue and post it and also calculate my indirect revenue and post it against the account. So that saves me anywhere from two, three, four days a month of manually calculating and posting those items.

7. Impact on your job

I think the tools that BiznessVision provides have helped me tremendously over the last couple of years. When I started with the company in 2000 the accounting system had really gotten off track. There were a lot of errors that had been made and it really took me a couple of years to try to track down and correct those errors, some of which were pretty major. When the BiznessVision reports became available: general ledger, detail summary reports, trial balances, and so forth; we were able to reconstruct and correct a lot of those problems. And I believe now that I'm just about at the point with my staff that they really understand how to use the software. So the intent of the design of what we're doing with the general ledger, really allows me now to contribute more to the strategic planning, helping to figure out where Matrix needs to go, and using BiznessVision to help us get there.

8. The support experience

I would say that our experience with customer support has been mixed. We ran into a few issues after upgrading recently. Access to their support techs is very good. You can reach them through email, through their web site, or you can give their support line a call and usually you'll be assigned a case number within 30 minutes. I think the technical knowledge of the staff is good. I did have some criticism, and I expressed this to Affineon's management, about how far their support technicians go in determining whether a situation is mission-critical or not. While we were catching up on our accounts payable, we were unable to import all of our obligations from our old system into our new system, which was causing us a problem for quite a while, between our IT and Affineon, to get it resolved. Ultimately, the problem turned out to be something that we neglected to do, but that was not apparent in the instructions or the manual. On the flip side, with the new version, 8.1, that we've just installed, they have a new item in there called Mass Maintenance of Accounts which, prior to version 8.1, you had to go into BiznessVision, the Admin module, and do mass maintenance of accounts. And now that's all been incorporated into 8.1, and so I needed to do some mass maintenance on key codes for our accounts., and all of a sudden we kept getting an error message. And despite the error message, it would still do the processing. It was just annoying to have to keep clicking 'OK' to clear out the error messages. And I would say within about an hour, Affineon had it solved; all I needed to do was download a utility and run that against our files and it cleaned up the problem.

9. The implementation experience

Well Affineon was very good on the project support side. We ordered up our server and had it sent directly over to Affineon. And Affineon and their tech support staff did all the set up; I didn't have to worry about it. It came back ready to go, and instead of doing the conversion myself, I decided to hire one of Affineon's super stars, and she worked with me to devise a budget, both in time and dollar amounts, for her to come out, actually do the transition, move the data from our old server to the new server, to do the upgrade, and to do the conversion. The budget that we came up with allowed for a full week; but she actually did it in 3 days. She spent maybe about a half a day with my staff covering our needs with different modules and she made us aware of help resources from both the manuals and the web site. So the implementation was really outstanding.



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10. Security attributes

Well I work in a small office with 4 individuals who are the primary users of BiznessVision. The users are in accounts payable, the general accountant, a payroll accountant, and then myself. And thankfully security is very easy to configure. You just go in and give everybody all the rights to a particular module or you can just restrict parts of it to read-only. There are some global security features that you can give to individual users, or you can fine-tune them. For example, you can have somebody just read-only in reports or somebody can just generate reports, they can look into accounts but not make changes—it's very flexible. We've not really had any problems with that. The only problem with it, again, is the human factor; remembering that if you decide you want an employee to have some extra responsibilities, I just have to remember to go ahead and turn it on for those functions. Maintenance is easy.

11. Meeting future needs

My sense is that BiznessVision is moving in the right direction with its products and services. At my two prior jobs, I had the misfortune of developing a good relationship with the software company; only one day to find that the company had sold out to a larger company and essentially, in both instances, the product was dropped. Customer support was the first to go, and then eventually the product was dropped altogether. When Affineon purchased BiznessVision, those nightmares kept me awake for quite a long time. And I called a couple of managers at BiznessVision and was assured that this wasn't going to be a problem this time around. So I'm very comfortable that now this isn't going to be the case, and that they're going to be here to continue supporting us, and to continue developing BiznessVision and to offer alternative solutions if they can't develop specific solutions. I think that Affineon does listen to their users; I know they listen to me and they take what I say to heart and I am very pleased with that. So, interacting with their executive team, and at the user group conferences, has been very much a plus. So I think BiznessVision will continue to meet our needs.
