

## Success story

# BAASS Celebrates Success With Midwest And Sage 300 ERP Solutions



### The challenge

As Midwest Wine & Spirits grew, they implemented Sage 300 ERP but faced issues due to inadequate training from their consultant, leading to improper setup and data inaccuracies, prompting them to consider finding a more knowledgeable partner or reverting to their old system.



### The solution

Midwest Wine & Spirits chose Sage 300 ERP but struggled to find the right consultant until they were referred to BAASS, whose initial meeting impressed them with several viable solutions, eliminating the need for further interviews.



### The result

Midwest Wine & Spirits was impressed with BAASS' exceptional service and support, as the team took the time to understand their business processes and challenges, provided comprehensive training on Sage 300 ERP, and helped the company increase its sales team by 400% with only three additional office staff, all while fostering a strong partnership built on trust and knowledge.



“They not only became a seamless extension of our own team, but made the scary undertaking of trusting someone with our vital information very easy.”



**Organization**  
Midwest Wine & Spirits Inc.  
**Industry**  
Retail Industry  
**Sage Partner**  
BAASS Business Solutions

### Midwest Wine & Spirits Inc.

Midwest Wine & Spirits Inc. has been providing retailers with wine, spirits, beer, and more since 2008. With a commitment to quality products, competitive pricing and excellent service, they experienced rapid and significant growth of their company in a very short amount of time.



### A Stumbling System Falls Short

As Midwest Wine & Spirits grew, they recognized that they needed an accounting solution with a higher level of functionality. They decided to implement Sage 300 ERP, and hired a consultant to assist them. Unfortunately, the consultant did not take the time to understand their business and only provided minimal training which resulted in the system not being setup properly and ineffective utilization of the solution. The System Administrator of Midwest Wine & Spirits explains, "I noticed right away that our data didn't look quite right, and was eventually able to determine that roughly 10% of our history had been transitioned incorrectly." Not getting the necessary results from their consultant, Midwest Wine & Spirits was faced with a choice: find a new partner with a greater level of expertise, or go back to their old system.

### BAASS' Service and Expertise is like a Fine Wine

Midwest Wine & Spirits had purchased Sage 300 ERP because it was the right solution for their organization, and they decided to stick with it. The challenge was in finding the right consultant to help them fully utilize its functionalities, and they found them when they were referred to the team at BAASS. "Our initial meeting with Tony from BAASS was truly incredible. After just one hour, he had presented several viable solutions to help us overcome some of our challenges. We knew right away that we wouldn't need to interview anyone else."

From the beginning, Midwest Wine & Spirits was genuinely impressed with BAASS' level of service and support. Not only did the BAASS team have a strong background in accounting and a thorough understanding of Sage 300 ERP; but they possessed a clear desire to learn the complexities of Midwest Wine & Spirits' business. Tony Chiodo, Partner of BAASS Chicago explains, "Many people can sell and install software, provide a little bit of training and leave. However, what sets BAASS apart is that we have a detailed approach and methodology to discover our clients' needs and requirements then make the proper recommendations. This allows our clients to leverage their technology in order to find new revenue streams, increase operational efficiency and decrease costs."

The first step in BAASS' methodology was to gain a thorough understanding of Midwest Wine & Spirits' business processes, pain points, bottlenecks, personnel, and goals. They did this by interviewing and observing staff members and documenting all unique procedures. BAASS designed a road map to success; recommending and detailing the benefits of several opportunities.

BAASS sought to build a foundation of knowledge for Midwest Wine & Spirits by going over each area of the system with Midwest Wine & Spirits' employees. "We covered everything from set up and configuration, to the creation of master files and the impact that set up can have on transactions; as well as how to properly process both day-to-day and exception transactions as well as how to properly process both day-to-day and exception transactions", explains Tony. After a successful transfer of knowledge, BAASS then coached employees on specific real-world questions. Lastly, they documented all of the proper procedures in order to provide a reference for future use.

With the discovery and training phases in place, BAASS began helping Midwest Wine & Spirits solve some specific challenges. An example of this was the development of a custom add-on used to calculate excise tax. Rather than having to process this information outside of their system, the add-on created by BAASS runs in the background of their Sage 300 ERP application, and records the data accurately in the General Ledger.





### A Toast to Partnership

From teaching Midwest Wine & Spirits' staff to use and trust their system, to customizing and automating daily reports and invoices, BAASS has provided a complete service. "BAASS would be the right team for ANY organization, whether or not they have previous experience within your industry," says the System Administrator. "They take the time to learn your industry and then seek to ensure you are as efficient as possible in every area." In fact thanks to the new efficiencies, Midwest Wine & Spirits was able to increase their sales team by 400%, while only having to add 3 additional office staff members! The Owner of Midwest Wine & Spirits reflects, "BAASS' support has been incredible. I think of myself as 'Mr. Options', and I have to say that I am continuously enlightened by Tony at BAASS. I think that my idea to have the software customized to work better for us is the greatest idea since sliced bread, however Tony stretches me by asking the really tough questions - getting me to think about what I am asking BAASS to do and how to make it happen. They have really been an outstanding partner and great friends!"

