



## BIO Empowers Decision Makers at Jordan Reses

Jordan Reses Supply Company is a full-line national distributor of medical equipment and supplies to federal government agencies, principally the Veterans Administration. An industry leader, the company is recognized for competitively priced, name brand products, and prompt delivery. The company's reputation is built on unmatched customer service and satisfaction.

### Business Needs

Jordan Reses needed information. They needed to understand the relationships between buyers' demand, and price sensitivity ahead of their competition. Using their existing QuickBooks accounting system, they had to wait a month for reports. And those reports did not have the detailed data they needed in terms of customers, sales, and profitability. Data was exported into Excel spreadsheets with lots of tabs and lots of look up tables. But the spreadsheets did not always tie to the QuickBooks reports and credibility of the spreadsheets suffered.

Coady Torio, Controller at Jordan Reses, was named project manager to upgrade the company's financial systems and introduce a business intelligence solution.

### Why BIO?

Jordan Reses engaged the technology solutions group at Maner Costerian, a Lansing, Michigan-based CPA and consulting firm, to help them replace their accounting system with a full-fledged ERP. Along with a recommendation to convert to Microsoft Dynamics GP, Maner Costerian also recommended BIO, a business intelligence solution for users of Microsoft Dynamics. James Meyer, Director of Business Development, had reviewed several reporting and analytics alternatives for Jordan Reses and recommended BIO because it was extremely powerful, flexible, and easy to use. With an out-of-the-box connector to their Dynamics GP system, a full featured data warehouse, and a world-class viewer, BIO promised value on Day One. BIO would not only enable Jordan Reses to provide insightful and timely reports, but Meyer thought it would allow them to "slice and dice" the data to get at the information that would help them grow their business. With BIO, the information they so desperately needed would not be held hostage by a busy IT department but would be available to any user with just a few clicks.

### The Solution

The installation was done by BIO Analytics Services, led by John Edwards, Senior Consultant. Edwards recommended skipping any conversion from QuickBooks to Microsoft Dynamics GP and importing the data directly into the BIO data warehouse. This way Jordan Reses could access four years of history without the time and cost required to get the data into Dynamics GP. This was a huge benefit--having this data available to view within 60 out-of-the-box pre-built views made the application useful on the very first day.

Although the installation went smoothly, there were a couple of challenges in rolling out the system. The first was general quality checking of the system. There was a

### BUSINESS IMPACT

Faster response to competition

Better-informed decisions

More accurate determination of product profitability

Increased credibility of financial data

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***Coady Torio  
Jordan Reses***

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large volume of complex data—four years of history of over 2000 products. Not all of these items were set up in Dynamics GP and there was also a question of how to record items sold as kits. What items were to be tracked and analyzed—the individual products or the kits?

Further, there were no analogous “pre-BIO” reports because much of the customer, sales, and cost of sales data was simply not recorded in the QuickBooks application. In effect, the reporting system was being built into a much more sophisticated reporting system from the ground up. What impressed Coady right from the start was how easily BIO was able to create and change reports for just about any user.

**“BIO has truly empowered the folks at Jordan Reses.”**  
*James Meyer*  
*Maner Costerisan*

Edwards was instrumental in helping Jordan Reses through each of their issues, from ensuring the data was correct to setting up views to meet Jordan Reses’ specific needs. “John was awesome—really smart, easy to work with,” says Torio.

## Business Impact

“We’ve learned more about the company in the last six months than we did in the last six years. I don’t know how we got along without it,” says Torio. The company is able to analyze its profitability and identify trends. Decision makers can pinpoint where the competition is making inroads and reassess sales strategy in real time. Marketing knows which products are profitable and is able to better evaluate its product mix. And Sales knows which manufacturers’ products are selling well and which are not.

Overall, Torio believes using BIO has made Jordan Reses a more capable company. Initial resistance turned to acceptance and then enthusiasm throughout the organization. Maner Costerisan’s James Meyer says, “BIO has truly empowered the folks at Jordan Reses. People we didn’t expect are using BIO—salespeople are using it to monitor territories and executives are running their own reports. It goes back to the reason we recommended BIO to begin with—power, flexibility, and ease of use.”

Torio says it works because they can look at the data the way they want to see it. For instance, the COO likes raw numbers and Torio makes heavy use of graphing and traffic lights. For another example of BIO’s flexibility, think about the age-old question—what is a customer? In Jordan Reses case, it could be a single hospital, a group of hospitals that purchases together, or the entire Veteran’s Administration. Torio says, “The beauty of BIO is that I can have all of these views, each one when I need it, and I can switch back and forth with a click of the mouse.”

## What’s Ahead

There is more Jordan Reses can do with BIO, but what comes next will depend on what goals are set by Frank Czajka the COO. For instance, Controller Coady Torio thinks the company would benefit by duplicating the success in operational analytics with financial analytics by extending BIO to the Microsoft Dynamics GP Receivables Management and Payables Management modules. Whether the company decides to extend BIO to more Dynamics data, broaden the user base to additional departments, or to exploit additional functionality such as scorecards, BIO for Dynamics will take them beyond reporting to identifying and taking advantage of valuable business opportunities through business intelligence.

## BIO ANALYTICS CORP.

BIO Analytics Corp. specializes in developing affordable, state-of-the-art BI solutions. BIO for Microsoft Dynamics reduces the cost, complexity, and technology required to implement a Microsoft BI platform. BIO’s business-ready framework is the most complete and adaptable business translation of Microsoft Dynamics. It is the only BI solution that includes an enterprise class visualization layer, BIOVue, and 60 out-of-the-box operational, strategic, and financial views. Start with Microsoft Dynamics and extend BIO to other corporate data assets.

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## MANER COSTERISAN

Maner Costerisan is a Microsoft Gold Certified Partner specializing in Microsoft Dynamics GP ERP and Microsoft Dynamics CRM solutions and offers a full range of business systems analysis, implementation, training, data conversion, customization, networking, IT infrastructure, and support services. Their experienced business solutions staff offers a combined 90+ years providing cutting-edge technology solutions.

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