



LUNA GRILL

THE ULTIMATE KABOBERY



Luna Grill – Case Study

Dave Schroeder - CFO

Luna Grill: This Company was not budgeting because of the limitations of Excellent Financials and didn't have a tool that made that process easier. They also didn't have a good distribution method to share limited financial information to each store manager.

Dave Schroeder: BudgetPro gives us several benefits over the existing Excellent Financials program that comes with Compeat. As you know, Compeat has Excellent Financials that allows me to build financial reports in excel. However those reports require more programming, and as we add stores, I didn't want to have to manage those templates. Budget Pro offers a dynamic solution to reporting and they run quickly. In addition, I don't have to create a distribution method for giving my managers access to the budget comparison reports. I can have my managers for each store login remotely to budgetpro, via a website, and they can see how they are performing against budget running the budgetpro reports. I am able to limit which locations and which GL accounts they have access to so I don't have to customize each Excellent Financial report. BudgetPro does that automatically for me and as we add stores I don't have to dynamically fix the reports. I can set user permissions and control the access through the admin controls.

The other benefits of BudgetPro are the tools it has for creating new budgets. Using the copy features we can quickly build next year budgets using growth calculations from history. I am able to see what the percentages each GL account is to net sales and compare to history or to other stores. This visibility makes budgeting much faster and more accurate.

Each month we export the data from Compeat into Budget Pro and are able to analyze each account across the other stores.

When it comes to normal accounting packages they neglect the budgeting component. Most CFOs in my position are left with using Excel and creating templates there or using Excellent Financials and managing formulas there. With BudgetPro we get an easy to use program that require little training. Managing the GL budgeting process is much easier now and I'm able to deliver the different Financial Reports my Lenders, Board of Directors or my Managers need with a seamless distribution method. The time savings and reduced stress in ensuring timely delivery and accurate numbers is fantastic.



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