



## CUSTOMER SUCCESS STORY

### Cartera Commerce Simplifies General Ledger by Moving to the Paragon Cloud.

#### SOLUTION SUMMARY

##### Industry

Business Services

##### Company Profile

“We make people happy” could be the company motto. From organizations with loyalty programs, to online retailers, to consumers, Cartera specializes in making them all happy.

##### Scenario

Old version of *Great Plains* software that was no longer supported by Microsoft.

##### Solution

Upgraded to current version of *Microsoft Dynamics GP* and moved system to the *Paragon Cloud*.

##### Benefits

- Eliminates reliance on IT.
- Scales as company grows.
- Easy upgrades.
- Cost savings.

##### Paragon Software Solutions, Inc.

Global Corporate Headquarters  
Burlington, Massachusetts  
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paragonhq.com

Cartera Commerce makes shopping more rewarding for consumers and businesses alike. The company partners with organizations that offer loyalty programs to their customers, giving them the opportunity to earn more miles or points by shopping at over 900 online retailers.

Cartera, located in Lexington, MA, has been using *Great Plains GP* (now called *Microsoft Dynamics GP*) for general ledger, receivables and payables since 2008. Prior to 2008 Cartera was using Quick Books.

Karen Cambray, Chief Financial Officer of Cartera Commerce said, “I was formerly the CFO at a company that was migrating from *Quick Books* to *Great Plains*. I came to know Mark Forbush, the founder and CEO of Paragon Software Solutions, and his team who did a fantastic job converting us to *Great Plains* quickly and accurately. It was a complicated integration, but I had such a positive experience that when I became CFO at Cartera I brought Paragon along with me. They've been helping us with our accounting systems for almost seven years.”

Tiffany Wright, Cartera’s Controller, said, “We were using a really old version of *Great Plains*. In fact it was no longer supported by Microsoft, and that was a problem. It would be disastrous if something bad were to happen, so it was high on my agenda to get us upgraded to the most recent version of *Microsoft Dynamics GP*.”

“As we looked into upgrading the



Karen Cambray  
Chief Financial Officer

system, we questioned why we were using our own hardware and hosting the system ourselves,” said Karen. “It's not a core competency for our IT guys, so it made sense to have Paragon upgrade the system to *Microsoft Dynamics GP* and move it to the *Paragon Cloud*.”

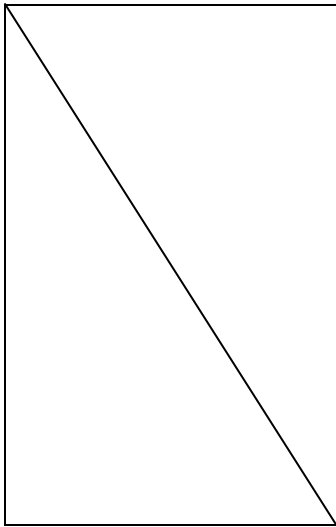
“Our IT people were extremely supportive,” said Tiffany. “It just made things a lot simpler for them, especially because Paragon knows *Dynamics* inside and out, whereas our IT team does not have the knowledge or training with accounting systems.”





# Paragon Software Solutions

Where Service Comes First



Tiffany Wright  
Controller

### Bringing Cartera to the Paragon Cloud

Karen said, "We talked with Mark about using *Dynamics* on the *Paragon Cloud* and decided that the *Paragon Cloud* would be the most efficient and effective way for us to run our accounting system. For any issue we can reach out to Paragon and we know from experience that they will resolve things quickly. They understand our business so that they can really jump on issues. It's just easier and more cost-effective and when it is time to upgrade it's an easy flip of the switch.

"The Cloud has come a very long way. It's very old school to buy hardware yourself or rent servers from a hosting facility and then manage all of those servers yourself. It is much more efficient and effective to have a company like Paragon bring you into the Cloud."

Tiffany adds, "My bottom line is that I just want the security of knowing that my team is able to get their jobs done and have the system work to the best of its ability. In the old version, basic reports, such as the agings, were constantly breaking."

### An affordable cloud

According to Tiffany, "The cloud is very affordable. I was surprised it wasn't much more than what we were already paying. We get system maintenance and support and everything is in the cloud. Paragon stayed within our expectations so it was a no-brainer for us to move to the *Paragon Cloud*."

"In the long run the *Paragon Cloud* is going to cost us less and it will also reduce down time," said Karen. "In addition, it will allow us to scale much more quickly."

"We're already seeing the benefits in that the *Paragon Cloud* freed up our IT team," said Tiffany. "They don't have to manage it. There has been a cost savings already because we have no in-house people needed to maintain the system."

Tiffany continues, "What I like most about being on the cloud is that Paragon takes care of it. I like knowing that if something goes wrong, I can call them and they'll be able to troubleshoot it very quickly. This lets me sleep at night. Plus, the Paragon people are really nice. They're patient, which is really helpful on my end. They're always nice, always responsive. That goes a long way."

### Everything is Going to the Cloud

Karen says, "I would absolutely recommend *Paragon Cloud* to others. You can free up your IT department; you can scale much more quickly; you can do upgrades more easily and you can grow the business and not worry about your financial system going down."

Tiffany summarizes, "Paragon has been tremendous through this process and has made the upgrade really easy. I've done upgrades at other companies with different implementers and it was not nearly as smooth as this. Paragon was very patient in answering all our questions. I would highly recommend Paragon Software Solutions and the *Paragon Cloud*."

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