Toronto's Majestic Castle Rolls Out Red Carpet with Sage BusinessVision

Casa Loma, built just before World War I by financier Sir Henry Pellatt, is Canada's foremost castle, and one of Toronto's top two tourist attractions. More than a third of a million people visit each year to view the mansion's stately towers, secret passageways, soaring battlements, and sweeping terraces. Casa Loma was the largest private home in Canada when it was constructed and boasted the city's first elevator in a home and leading-edge residential electricity.

Filmmakers and event planners take advantage of Casa Loma, which has been called "the most romantic thing to ever happen to Toronto. "X-Men" was shot here, along with countless other Hollywood movies. Brides hoping for a wedding at Casa Loma join a waiting list that is two years long.

Selecting Sage BusinessVision

Casa Loma is now a nonprofit organization operated by the Kiwanis Club of Casa Loma, which works hard to make revenues stretch as far as possible. So old-school glamour must be matched with modern-day efficiencies. This created a problem for the accounting group and its batch-processing accounting system.

"Our previous software required lengthy month-end processes and did not provide us with real-time data," says Dwight Lackey, controller. "We sought a system that was both cost-effective and had the functionality and flexibility necessary for a multifaceted organization. Sage BusinessVision was the clear winner, and we implemented it in 1999."

Powerful POS for Ticketing

The castle uses Sage BusinessVision Accounting in three main areas. The first is as a point-of-sale (POS) tool for ticket processing. "When a customer comes to the box office, they purchase an adult, child, or senior ticket. Each is an inventory item in our system. The payment is processed as cash or through an integrated credit/debit card system," explains Lackey.

"We also have several tour operators bringing busloads of guests, and these have credit privileges," he continues. "Their tickets are processed on account through the Sage BusinessVision Accounts Receivable module. Other types of charges like special events or shows all have individual codes, which are processed as inventory items by the system."

Customer
Casa Loma

Industry
Nonprofit

Location
Toronto, Ontario

Number of Locations
1

Number of Employees
22 full-time plus 50 seasonal

System
Sage BusinessVision

Modules in Operation

- **General Ledger**
- **Accounts Payable**
- **Accounts Receivable**
- **Point of Sale**
- **Inventory**
- **Reporting Suite**

Challenge

Batch-processing accounting system did not provide real-time analysis, required cumbersome month-end processing and limited growth.

Solution

Sage BusinessVision with full complement of accounting, inventory, point of sale, bar-code, and reporting modules.

Results

Productivity has doubled, thanks to the versatility of Sage BusinessVision; POS software sped transactions— making castle first in customer satisfaction among all Toronto attractions.

Visitors can also purchase tickets on Casa Loma's Web site. "Online purchases result in a voucher that moves guests to the front of the line when they arrive at the castle," Lackey says. "The voucher is processed into the POS module as an on-account transaction, and we receive monthly remittances through our ticketing partner. Everything is integrated seamlessly through Sage BusinessVision."

Ringing Up Sales in Gift Stores

The second important role for Sage BusinessVision at Casa Loma is in its two gift shops, where the POS system records sales. "Our software inventories all gift store items into categories so that we can do analysis on sales transactions," Lackey says. "Each item is tracked with a bar code, whether inventory is being sold in our main store in the basement or in our third-floor outlet shop. We treat the two locations as separate warehouses within Sage BusinessVision, making it easy to transfer items from one to the other and compare sales results.

"We also do traditional inventory reporting using Sage BusinessVision reports, such as counts and variance analyses. It works very well for telling us which items are most viable from a revenue perspective."

Complex Catering Management

The third main area managed by the software is the catering department. "We host and cater approximately 250 functions a year, and all details are tracked through Sage BusinessVision. Each category of event has a different customer code. Weddings start with W, for instance. Then the date serves as a secondary indicator," says Lackey.

"We use Sage BusinessVision in a unique way with regard to events. Our clients frequently apply deposits on account for events scheduled a year or two in the future. When our software

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>
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> Controller, Casa Loma

records these, it is effectively performing trust accounting, and distinguishes accurately between deposits and operating funds," he adds.

Royal Returns

How has the system improved operations for Casa Loma? "Sage BusinessVision is extremely versatile and therefore opens up many options for us. We can approach our business in a completely different way. For example, online ticketing would never have been possible with our old cash register system at the box office. Also, the software lets us partner with other organizations to grow our business. We are currently number one in satisfaction with ticket purchase experience of all tourist attractions in Toronto—primarily because of the speed of our POS system. It's the most customer-oriented software in town," Lackey explains.

"Furthermore, we have doubled our productivity, thanks to Sage BusinessVision," he continues. "I can't imagine how my predecessor ever functioned without it."

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