Building Contractor Integrates Operational Systems, Opens Up Information Access

Overview

Country or Region: United States
Industry: Construction

Customer Profile

ATS Automation of Renton, Washington, provides engineering and installation of heating and cooling systems. The company has 90 employees and U.S.$20 million in annual revenue.

Business Situation

The company's aging Peachtree accounting software provided limited functionality and accessibility, forcing the accounting staff to reenter data and employees to manage without timely information.

Solution

ATS deployed an integrated management solution using Microsoft® Business Solutions–Solomon to integrate key business functions including financial reporting, project management, and field service.

Benefits

- Integration of key business functions
- Better project management
- 50 percent reduction in administrative work
- Online access to real-time data

"Use of Microsoft Solomon has resulted in higher employee productivity, higher morale, and better teamwork."

Juli Valliant, Financial Manager, ATS Automation

ATS Automation designs and installs control systems for regulating heating, cooling, and ventilation systems. ATS ran its business on an aging version of Peachtree accounting software, numerous versions of Microsoft® Excel, and a few vertical applications. The accounting staff invested a great deal of time performing duplicate data entry to tie the systems together and then printed monthly reports that sat in binders. Seeking a modern accounting solution that could automate business processes and provide Web-based access to critical information, ATS implemented Microsoft® Business Solutions–Solomon (now part of Microsoft Dynamics™) with the help of Microsoft Gold Certified Partner Synergy Business Solutions. Today, the accounting staff spends 50 percent less time on routine administrative tasks. And everyone has access to up-to-date project data for making better decisions—especially valuable for remote offices and project managers.

Microsoft® Business Solutions–Solomon
Now Microsoft Dynamics™ SL

Microsoft Dynamics™

"Microsoft Solomon gives us more data, better data, and more timely data. Our managers are able to make better, faster decisions each day, as well as more intelligent long-range planning decisions."

Brian Allen, Co-Owner and Chief Executive Officer, ATS Automation

Situation

ATS Automation of Renton, Washington, provides building automation contracting services including engineering and installation of heating, ventilating, and air conditioning equipment to commercial buildings and campuses. The company has approximately 90 employees, annual revenues of U.S.$20 million, and offices in Spokane and Anchorage in addition to the headquarters location.

As ATS expanded its business and opened new offices throughout the Pacific Northwest region of the United States, the company became painfully aware of the limitations of its aging Peachtree-based accounting system. "We had limited software support for the key functional areas of our business, and none of our software was integrated," says Brian Allen, Co-Owner and Chief Executive Officer of ATS Automation. "Also, our business users had no online access to information. This was especially crippling to our remote office staff and field-based project managers, who had to request information by phone or come into the Renton office periodically to look at paper reports."

ATS had only two Peachtree licenses, further limiting access to electronic information. But because the software was cumbersome to navigate, the accounting staff had decided that it would not be useful to broaden access to employees outside the accounting department.

The three-person accounting staff spent hours each month entering and reentering project data in Peachtree and multiple versions of Microsoft® Excel, trying to keep data consistent and up-to-date. Most project tracking was done in Excel—creating job estimates, tracking expenses, and updating schedules—and all this data had to be manually fed into Peachtree. The accounting staff laboriously created monthly reports in Peachtree, printing and placing the reports in three-ring binders that sat in the accounting department and were practically inaccessible by most of the company.

"We operate on a fixed-price basis, so our managers need to know where they are with expenses on every job," says Juli Valliant, Financial Manager for ATS Automation. "We couldn't give them up-to-the-minute information with our old setup. With our paper reports, we were not getting information into the hands of the people who needed it."

The final straw came when Peachtree stopped supporting the version of its product used by ATS, forcing the customer to consider other alternatives. "Because our accounting system was paid for, we had ended up molding our business to the software over time, and that limited us," Allen says. "We knew it was time to find financial software that would keep up with us."

Solution

ATS Automation set forth the following objectives for its new business management solution:

- Greater integration to eliminate redundant data entry
- Browser-based accessibility of central office data for remote employees
- Rich array of capabilities that will facilitate company growth

ATS performed a thorough evaluation of construction industry software from Timberline, Forefront, and Computer Ease, and decided instead on Microsoft Business Solutions–Solomon. "Microsoft Solomon has a Web portal, based on Windows® SharePoint® Services, that gives field people full access to project data over a browser," Allen says. "None of the other systems had this. The portal also allows employees to enter time sheets and expense reports over

the Web, which reduces administrative work for our accounting staff."

Allen is referring to Microsoft Business Solutions Business Portal, which integrates seamlessly with Microsoft Solomon to deliver applications, information, and processes to employees, customers, and partners across an enterprise. ATS Automation uses Microsoft Business Portal to give employees "anytime, anywhere" access to information stored in Microsoft Solomon.

Microsoft put ATS in touch with a Microsoft Gold Certified Partner, Synergy Business Solutions, which has offices in Portland, Oregon, and Bellevue, Washington. Synergy specializes in the design, implementation, training, and support of project accounting solutions based on Microsoft Solomon.

Synergy introduced ATS to its "Plan > Prove > Purchase" approach to implementing Microsoft Solomon, which involves a needs assessment and planning process followed by a prototype using real customer data. The customer pays half of the planning and prototype cost up front and gets to see the product's full functionality in its own environment before acquiring the solution. If the customer likes what it sees—and Synergy has never had a customer decide not to proceed—the customer pays for the other half and the solution itself.

"Synergy was the only solution provider that we talked to that made such an offer," Allen says. "We loved what we saw and went 'full steam ahead' with Microsoft Solomon." Synergy's implementation of Microsoft Solomon at ATS took just three and a half months, coming in on time and within budget.

ATS runs Microsoft Solomon version 6.0 on a single Dell PowerEdge server computer with the Microsoft Windows Server™ 2003 operating system. Microsoft SQL Server™ 2000 Standard Edition serves as the company's integrated financial reporting and project management database. Both Windows Server 2003 and SQL Server 2000 are part of Microsoft Windows Server System™ integrated server software.

Benefits

ATS Automation now has a means of electronically supporting and integrating key business functions, including financial and project accounting, distribution, inventory, and field service. Not only do the many Microsoft Solomon modules span the functional breadth that ATS requires but they also are integrated, eliminating data reentry and related inaccuracies. Up-to-date project data is available to all employees at any time from anywhere. And the accounting staff is relieved of a great deal of time-consuming administrative work.

Better Project Management

By harnessing Microsoft Solomon to all areas of its business, ATS now has electronic support—and the accompanying efficiencies—for every key business function. For example, in its project-oriented business, ATS needs to accurately transfer labor and materials costs to customer invoices as projects progress (progress billing). Before Microsoft Solomon, ATS had a tough time doing this because invoices were created manually. Today, project managers enter costs and schedule milestones in Microsoft Solomon, and that data automatically flows into the modules used to generate cost tracking reports, schedules, invoices, and other project documentation.

"Microsoft Solomon gives us more data, better data, and more timely data," Allen says. "Our managers are able to make better, faster decisions each day, as well as more intelligent long-range planning decisions. We can also look back at previous jobs when

"Everything a customer might want to know about his project is right at every employee's fingertips. Our project managers don't have to guess or make excuses. This leads to higher customer satisfaction."

Juli Valliant, Financial Manager, ATS Automation

bidding new jobs to get labor costs on similar projects. That helps us win new business."

Adds Valliant, "Before, our employees didn't feel empowered, and now they do. We've gotten a lot of positive feedback from project managers in particular. Use of Microsoft Solomon has resulted in higher employee productivity, higher morale, and better teamwork."

50 Percent Reduction in Administrative Work

The automated efficiencies of Microsoft Solomon have presented the most dramatic time and cost savings to the three-person accounting department at ATS. "Everyone on my staff is doing more in less time," Valliant says. "This has enabled the company to grow tremendously without increasing the accounting staff."

For example, time sheets and payroll used to be manual processes involving a great deal of data reentry. Employees would fill out time sheets and fax them to accounting, and the accounting staff would enter the data into Peachtree. Now employees enter time sheets and expense reports directly into Microsoft Solomon using Microsoft Business Portal. Accounting employees still review the figures, but their involvement in these routine administrative tasks has been reduced by 50 percent.

Another example is subcontractor invoicing. Valliant used to record subcontractor invoices in an Excel spreadsheet and then manually create invoices. Today, she enters invoices into Microsoft Solomon, and they automatically flow into the accounts payable module. This has eliminated the need for the subcontractor spreadsheet and reduced the time needed to process subcontractor invoices by 50 percent.

"We still use spreadsheets, but instead of being static documents containing month-old data, they're updated daily by Microsoft Solomon, which is great for forecasting," Valliant says.

Online Access to Real-Time Data

Using Microsoft Business Portal with Microsoft Solomon, ATS employees in remote offices and field-based project managers can get access to timely project information from any browser. This helps them manage projects more intelligently and cost-effectively, as well as answer customer questions more promptly.

"In the past, if a key person in accounting was out sick, a customer request would have to wait until the next day for a response," Valliant says. "Now, everything a customer might want to know about his project is right at every employee's fingertips. Our project managers don't have to guess or make excuses. This leads to higher customer satisfaction."

In conclusion, Allen says that Microsoft Solomon gives ATS Automation a clear path forward. "Microsoft Solomon is an engine that allows us to get where we want to go," Allen says. "Before, we were a small company with an archaic system that was a governor to our growth. Microsoft Solomon makes it easier for us to conceive of growing our remote offices. It removes barriers to growth."

For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234 in the United States or (905) 568-9641 in Canada. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to: www.microsoft.com

For more information about Synergy Business Solutions products and services, call (503) 452-6981 or visit the Web site at: www.synergybusiness.com

For more information about ATS Automation products and services, call (425) 251-9680 or visit the Web site at: www.atsinc.org

Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship and supply chain processes, Microsoft Dynamics brings together people, processes and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

For more information about Microsoft Dynamics, go to: www.microsoft.com/dynamics

Microsoft® Business Solutions–Solomon
Now Microsoft Dynamics™ SL

Software and Services

- Microsoft Dynamics
  - Microsoft Business Solutions–Solomon
- Microsoft Windows Server System
  - Microsoft Windows Server 2003 Standard Edition
  - Microsoft SQL Server 2000 Standard Edition

Hardware

- Dell PowerEdge server computer

Partners

- Synergy Business Solutions

© 2005 Microsoft Corporation. All rights reserved.
This case study is for informational purposes only. MICROSOFT MAKES NO WARRANTIES, EXPRESS OR IMPLIED, IN THIS SUMMARY.
Microsoft, Microsoft Dynamics, SharePoint, Windows, Windows Server, and Windows Server System are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries. All other trademarks are property of their respective owners.

Document published March 2005

Microsoft®