

Full Integration, Flexible Reporting Parlayed into Success for Plumbing and Heating Contractor

Minnesota-based Wenzel Plumbing and Heating had enough of general accounting software and third-party construction software that didn't integrate well, so the mechanical contractor turned to software they knew would flow well together—Sage Timberline Office.

Vice President of Operations and Chief Financial Officer Greg Kupka says Wenzel's old software was so poorly integrated it caused problems every time one part of it was upgraded. "You'd have to make sure it was compatible with the main software, and there was always a delay in putting the upgrades in. With Sage Timberline Office, that's not a problem—the software is fully integrated," he says.

Wenzel uses a full array of Sage Timberline Office applications, ranging from Accounting to Service Management to its latest acquisition, Project Management. The integration between the different products means the data has to be entered just once into the system no matter how many places it needs to be. "It's important to have data flow through all applications so you don't have to do something else to get the information out," Kupka says.

Cutting Down on Paper

Using Project Management has really cut down on the amount of paperwork that Wenzel employees have to handle manually. The software handles everything from transmittals and RFIs to correspondence and meeting logs. "Tasks become easier because we don't have to prepare as many documents by hand and store them in different locations. Before Project Management, many items would get lost and the project managers wouldn't be able to follow up on them. With the software, it tracks the status of various items. You can print out reports that show what issues have not been resolved or important questions that haven't been answered yet," Kupka says.

Wenzel also likes the way the software ties into Job Cost, making it easy to pull up job numbers, vendors, and contacts from within the Project Management software. "It's really handy," Kupka says.

Customer:

Wenzel Plumbing and Heating

Industry:

Plumbing and Heating Contracting

Location:

St. Paul, Minnesota

System:

Sage Timberline Office

- Accounting
- Procurement
- Project Management
- Property Management
- Reporting and Other Tools
- Service Management

CHALLENGE

The previous spreadsheet system of tracking spending didn't provide real-time access. Managers never had a current picture of job cost status.

SOLUTION

Comprehensive Sage Timberline Office software automates many accounting tasks with integrated modules that provide real-time, job-based information.

RESULTS

Project managers now have fast access to the information they need. The Sage Timberline Office system saves time and raises their productivity.

Simplifying Dispatch

Wenzel has a small commercial service department that Kupka conservatively estimates gets 10 calls a day during the non-busy seasons. The company relies on Service Management software primarily for its dispatch board. The dispatch board helps Wenzel schedule and track its technicians throughout the day.

“The color-coding feature allows us to easily view our technicians’ schedules to see where they’re at, how long they’ll be on a project, and when they’ll be available for another call,” Kupka says.

Automation Saves Time

Sage Timberline Office automates many accounting tasks, making it possible to do the work easier and faster. It also makes it possible to get information quickly and efficiently. That’s something Kupka says Wenzel appreciates. “Project managers are looking for costs at a particular time, and they can get them when they need them,” Kupka says. “They used to do it manually with spreadsheets, and they could never find out at any one time how their projects were doing. Sage Timberline Office has it in the format that’s easy to get to and timely.

Wenzel also makes good use of the software’s report writing capabilities, creating many customized reports. Kupka says the software is flexible enough to give them accurate information in most every format they want.

Wenzel prepares reports on both a year-to-date and a monthly reporting cycle for individual departments as well as a consolidated financial statement.

“The reporting function of Sage Timberline Office has worked out very well for us,” Kupka says. “You don’t have to go to several different places to get information and put it all together. With Sage Timberline Office, everything’s there for one-stop shopping.”

For more information about Sage Timberline Office, visit www.sagecre.com, call 800-628-6583, or contact your local Sage Timberline Office Business Partner.

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Vice President of
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