

INVESTING IN TECHNOLOGY

Integrated software meets needs of growing Minnesota contractor

R & S Heating and Air Conditioning is a \$10 million Minnesota contractor.



SAVAGE, Minn. —
Founded in 1978 by
Robert and Shirley
Thielen, R & S Heating
and Air Conditioning
began as a typical “mom
and pop” shop. Focusing
on quality construction
and good customer service,
for years the Thielen did
the accounting for their \$1
million company using
manual systems. When the
couple’s son, Brett, took
over company operations
nine years later, he
pursued an aggressive
growth plan, investing
time and money in people
and technology.

Today R & S employ around 40 hvac technicians and eight office employees, including project managers, administrative workers and accounting staff. The company’s \$10 million in annual revenues come from commercial and industrial construction, service work, and sheet metal fabrication.

When R & S outgrew its current accounting software, chief financial officer and Controller Wendy Roepke – the company’s first certified public accountant — set out to find a new system to meet its evolving business needs.

Decisions

After extensively evaluating software packages, in September 2000 Roepke chose Dexter + Chaney’s Forefront® construction management software. For R & S, it was important that the company who developed the software was also the company who sold and supported it. Dexter + Chaney met this requirement. Integration was also important, Roepke said.

“We needed software that had work orders or service-related features and job costing,” Roepke explained. “There aren’t too many that have them integrated together.”

Forefront provided company officials with an integrated solution which included accounting and service modules, plus project management software, document imaging capability and the ability to access their software from remote locations such as job sites or home offices.

With limited staff to perform the work of their busy construction business, accessing the software away from the office was

While working remotely or from the main office, a simple click of the computer’s mouse enables software users to view any scanned document on their computer screen and print, fax, or e-mail a document as needed.

very important. Although R & S didn’t have immediate plans for implementing remote access, company officials expected remote connectivity would eventually be put to use.

That time came sooner than expected. When Roepke discovered she was pregnant, she proposed a plan to the owner to use the new software’s capability to continue her work from home. Forefront’s Remote-Link module allowed Roepke to remain CFO/controller during her maternity leave.

“I pretty much handle 100 percent of anything paper-related, including invoicing customers, approving payables, and cutting payroll checks,” she said. “During my maternity leave, I was able to access customer balances and vendor information from home so I could speak intelligently with people. It was very easy for me to log on every day and be available for my co-workers and our customers. It was almost seamless.”

A time saver

Roepke said another feature, document imaging, made her work from home easier during her maternity leave. Document imaging allows users to scan paper documents and attach them to actual transactions in their accounting software. User-defined electronic filing cabinets store documents not related to transactions.

Time cards, reimbursement receipts, vendor invoices, change request information, backup journal entries, and more are scanned and stored electronically.

“It’s a huge time saver within our software,” Roepke said.



Document imaging software allows Wendy Roepke, CFO and controller for R & S Heating and Air Conditioning, to scan paper documents and attach them to transactions in the company’s accounting software.

While working remotely or from the main office, a simple click of the computer’s mouse enables software users to view any scanned document on their computer screen and print, fax, or e-mail a document as needed.

Document imaging also helped R & S’ change order process: As soon as a project manager or job superintendent recognized a change, workers scanned related documents and stored them

electronically.

“Whether it’s something as formal as a written RFI (request for information) or as informal as a job superintendent jotting down, ‘I authorize this overtime today,’ on a scratch piece of paper, we scan it into the computer,” Roepke said. “We figure that if we lose an RFI or change directive, that’s money right out the door. With document imaging, documents for change orders or backup for time and materials jobs are never lost. That’s a great advantage to our company.”

Another tool

Integrated project management software is another tool that R & S uses to manage their jobs and streamline their workload. “Our goal was to have everything together, so purchasing project management software that integrated with our accounting system was almost a no-brainer,” Roepke explained.

Having RFIs look the same each time, rather than being printed in different formats or on fax cover sheets, is just one benefit of using project management software, she added. “I think we are always doing things correctly, but not tracking things well enough. Project management software does that for us; it helps us become more organized.”

(For information about Dexter + Chaney and Forefront® construction management software, contact Dexter + Chaney at 9700 Lake City Way NE, Seattle, WA 98115-2347; phone (800) 875-1400 or (206) 364-1400; fax (206) 367-9613. See www.dexterchaney.com on the Internet.) 