

FROM ESTIMATE TO QUALITY INSPECTION:

A fully integrated end to end workflow

PROBLEM

Advanced Mechanical USA was looking for an end to end workflow to manage the exponential growth that it is experiencing. The segmented semi-manual processes had taken them as far as they could and they were looking for a solution that would allow them to scale.

WHY RESULTS?

The cornerstone of Advance Mechanical USA's existing system is QuickBooks Enterprise and Advance Mechanical USA was specifically looking for a tool that was web based, flexible and fully integrated with QuickBooks Enterprise that also included Field Services functionality to replace the existing paper process.

SOLUTION

Process Distillery, a Results Partner and Business Strategy Firm was engaged by Advanced Mechanical USA to assist with business process improvement, system selection and implementation services. Process Distillery ran an RFP process for Advanced Mechanical and after reviewing multiple options, chose Results due to its flexibility in handling projects, field services and other activities. The end-to-end workflow was achieved by leveraging the built-in Class functionality within QuickBooks Enterprise. Take-off's and estimates are created in Stack CT and Flow into QuickBooks, where they are picked up and synchronized into Results. Once in results, the classes from the estimate are leveraged to drive workflows and automations to minimize manual processes. Activities in Results are heavily leveraged to manage projects, including field services and an API integration to a product called Operations Distillery, fully leverages the activities and Advanced Inventory in QuickBooks Enterprise.



AT A GLANCE

RESULTS SOLUTION

- Project Management
- Field Service Management

INDUSTRY

- Heating and Air Conditioning

NUMBER OF USERS

- 40

INTEGRATED APPS

- Quickbooks Enterprise
- Operations Distillery



"Working with Process Distillery and Results has been a transformative experience for our organization. We've eliminated paper processes, avoided double entry across systems, and empowered our field crews with real-time data. I highly recommend the platform and the companies."

KIM MCLAUGHLIN
Controller, Advanced Companies

BENEFITS

PROJECT VISIBILITY

By revealing the inner workings of the company, Advanced Mechanical demystified its operations. The entire team can enhance communication and deliver exceptional service to their clients with complete transparency on every project and to every customer. Employees can provide customers with up-to-date information on Project status and explain any delays when everyone has access to project information, ensuring a seamless and informative experience.

PROCESS AUTOMATION

Advanced Mechanical streamlined their operations using a combination of leveraging classes in QuickBooks to segment phases of the project and then created event-triggered automation. As a result, the company can effectively oversee their business at a strategic level, without becoming entangled in the minutiae of data entry. Results allowed Advanced Mechanical to expedite several of their multi-step processes, ensuring all members operated from the most up-to-date information.

SOLUTION

By aligning their data and allowing the data to flow end-to-end from Take-Off to Estimate to Sales Orders and on to Activities, warehouse pick lists and ultimately invoicing without the need to re-enter data. Now end-users, project managers, and executives can all see data the way they want to see it in near real time. This allows for better decisions, faster resolutions of issues and ultimately more profitable projects.



PARTNER SPOTLIGHT

Process Distillery is not your typical Business Strategy Firm. Their approach melds the concepts of business strategy business consulting and technology consulting to help companies make more money. Let Process Distillery and their team of over 70 resources help you leverage the power of the Results Platform, optimize your business processes, and optimize your workflows and data flow.

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