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PRIMED FOR BUSINESS

TABLE TENNIS – THE SMART WAY

CHALLENGE John Hart Pty Ltd was groping in the dark trying to manage parts and service requests, and to get the best use of its business data.

SOLUTION Greentree CRM has streamlined quoting, while integration with Financial, Inventory and Job Costing gives access to all performance data, and Workflow keep all users up to date.

RESULTS Mistakes in transactions eliminated, major time savings for finance staff, and a vastly improved view of how the business is working.

Andrew Vogan, Corporate Projects Manager
John Hart Pty Ltd

"It's allowed us to really see how our business works; we're able to get inside it now and understand the numbers."

When you're playing table tennis, seeing the ball should be simple. But if the 'ball' consists of a series of orders that are bouncing back and forth between various branches of your business, visibility can be tricky.

John Hart Pty Ltd is an Australia-wide family business, supplying machine tools, special products and factory automation systems. While the technology that they import, install and maintain is state-of-the-art, they were using a UNIX-based business management system that just wasn't delivering.

"Getting reports was becoming more and more onerous," says Corporate Projects Manager Andrew Vogan. "We also had a plethora of databases that included Microsoft Access, Word documents, Excel spreadsheets and other systems people had developed… we just didn't have a unified approach."

Bouncing balls
National Customer Service in Melbourne needs to keep track of service requests at all branches to ensure correct billing for parts used on service jobs. Vogan says managing all those requests, and keeping them up to date on a centralised parts and timesheet database, was like playing table tennis blindfolded: once the ball had been served, they had trouble tracking where it was.

"We were losing track of our parts because they'd be moved 'inventory-wise' into another warehouse and we were trying to match up paper documents that might have been filled out in the field by a service engineer. If a part number hadn't been written on the field service report, we wouldn't know to invoice it. Only at stock-take would we realise that we'd forgotten to invoice."

The tracking of maintenance done on a machine was also rather fragmented. After invoicing from the accounting package, time and materials were re-entered manually into an unlinked database. Errors were almost inevitable.

"We didn't have the ability to interrogate our data in any meaningful sense," Vogan says. "After being entered into the accounting system, the revenue and costs were recorded separately in Access. But it was reliant on the accounts people remembering that it was a cost for that job and putting it into another database – it just didn't happen regularly or accurately."

The spare parts issue was, in Vogan's words, "the straw that broke the camel's back".

"We saw this as an opportunity for us to get our business systems aligned properly," he says. "Our sales and marketing systems also needed upgrading. The main issue was a lack of integration between the accounting and CRM systems."

From an initial list of 10 software products, a shortlist of five was compiled: Great Plains, Pronto, SAP B1, Sage/Accent, and Greentree.

"We found that Greentree was the best fit for functionality, and what really got it over the line was its multi-tiered job costing capability," Vogan says. "Other packages, for example, were limited to three levels, but Greentree is effectively unlimited."

Headache relief

The seamless integration that Greentree provides between Financial, Inventory, Job Costing and CRM, means John Hart now has proper visibility of how it's performing. The Workflow desktop updates automatically for all users – allowing them to see those bouncing balls!

"We can now do comparisons over time," Vogan explains. "We're able to access data that tells us more accurately how projects are progressing. The management of our spare parts has improved as we're now able to see the sales histories and manage the inventory levels accordingly."

"We've been able to build service histories of all our customers and their machines. The sales department can also see a history of a customer and all the contacts that we've had with them."

Vogan is especially happy with Workflow's Approvals & Alerts. "Mistakes in transactions have been reduced from dozens a month, to virtually none," he says. "I used to spend hours correcting GL or job cost codes. Now the error level has been cut dramatically, as we can create

rules and control the system. It's a classic continuous improvement structure."

Vogan says Greentree's data analysis capabilities have been a boon for John Hart's financial department.

"The year-end audit is now much faster and simpler because the auditors can use the system to drill down to the source documents. Previously they had to pull bits of paper out for everything and it was very time-consuming."

The Manufacturing module has also been added, and is used in John Hart's Australian and international operations, for a new product range that has been developed and manufactured in-house.

For John Hart, Greentree has produced a major competitive advantage.

"We know exactly where the costs are in our business, which is vital," says Vogan. "We know which parts of the business need to be focused on, and which areas can be given latitude as they're doing well."

"It's allowed us to really see how our business works; we're able to get inside it now and understand the numbers. It means that when we talk to people within the business or outside the business about things we're doing, we've got the facts to base it on."