



Accounting Software

WOOD & ASSOCIATES attributes growth to Solutions Accounting

Background

Wood & Associates Direct Marketing Services Ltd. is an industry leader in Data and Communication Solutions as well as Mail and Distribution Management. In brief – they assist companies in communicating with their target markets. From the production of Direct Marketing campaigns through to website fulfillment. From donation intake and receipting for non-profits through to survey, rebate and order intake.

The Challenge

Wood & Associates is very much a project-based company, having both one-off projects and ongoing continuous projects. Wood was using separate systems to fulfill its project's data input requirements. Quotations were done in one system (a standalone Contact Manager). When the quotation became a project, a job docket was created in the contact management system. The project would then be scheduled using Microsoft Excel. Finally, they needed to re-enter the invoice in the accounting system. All 4 stages involved re-entry of data. The company also had a job costing system in yet another database, to track overall project costs against revenues. It involved the re-keying of information a fifth time. Annabelle Wood, president, was unable to get a handle on how much time was being used in the old system. However, Annabelle recognized that it was a very inefficient and resource intensive process, as well as prone to errors via multiple data entry steps. The actual project profit and loss information, critical to re-quoting projects, was a particular concern.

The Solution

Blue Link Solutions Accounting now handles the entire process, from quotation to invoicing, tracking of all job costs and revenues, and links with the pre-existing Contact Manager. There is now a single point of entry for all information. The solution was designed using Blue Link Solutions ProPlus, with a minimal amount of custom development.

Annabelle Wood states that there has been a 30 to 40% growth in project volume since Blue Link Solutions was installed; yet Wood & Associates is still able to use one person to handle the invoicing of their projects. This is largely due to the fact that with Solutions there is no longer any re-keying of data into disparate systems. The accuracy level of invoicing has increased. Invoicing is now done directly from job docket data; whereas, before it was based on a review of the hard copies and then re-keying of the information.

According to Annabelle: "By doing the quotations and the job docket in one system, you have much more reliable and consistent information. The information is far more comprehensive than

it ever was. It has given us a far better picture on point in time on what our sales figures are – a very clear view of the jobs in progress, and therefore, has allowed a much more effective use of our resources. It has also allowed for the incorporation of the scheduling as part of the jobs in progress function.”

The customization that was done: modified inventory items to contain a time element (added two fields – time and rate) has allowed Wood to take jobs in progress – export to Excel – based on qty, and then estimate the time needed to finish the project. It’s important to note that the information that goes on the job docket is not necessarily the same information that goes into the quotation or the invoice. This is because some of the information is for internal use only. These detail fields were part of Blue Link’s custom project.

The integration of Solutions Accounting with Microsoft Office products has also been a great help. The integration has allowed for more time effective reporting capabilities. Annabelle stated, “It has allowed us to take each production department as a cost centre, and report on them. The inventory items are broken down by department, and this is how we are able to report on them. It has allowed us to take a step forward in our production process at one tenth of the cost of other products that we were looking at. Blue Link’s Solutions Accounting has allowed us to create an online project docket. From quotation through to invoicing, everyone in our organization can view where a project is at any time. Solutions Accounting has not only changed our accounting systems, it has changed all our internal job processes.”

Maximum flexibility. Minimum cost.

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