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Intuit® QuickBooks® Enterprise Solutions

Jacobson Window Company Gets a Clear View of their Business With Intuit QuickBooks Enterprise Solutions

Business challenge

Management of financial data using Sage DacEasy had become so complex that only one employee at a custom window manufacturing company was able to access the system and pull the data they needed to run the business. The company needed a system that would empower employees across the company with the right level of information and reduce the cost and complexity of managing their business.

Solution Intuit QuickBooks Enterprise Solutions: Manufacturing & Wholesale Edition:

- Short learning curve for employees across the company.
- Easy access to real-time data essential to understanding business performance.
- Integrates with over 350 3rd-party applications.

Benefits

- Saved $60,000 to $70,000 annually.
- Simplified their accounting processes and decreased the size of the Chart of Accounts substantially.
- Easily integrated Enterprise Solutions with document management software to reduce paper and streamline business operations.

Business agility a critical component

If you need windows and you live in Florida, Jacobson Window Company are the people to see. The people behind Jacobson have been providing custom windows to the hurricane-prone region for over 50 years, and know exactly what's required.

But what's less predictable for the company is how the industry is going to perform. In such changing environments, they need quick access to key financial information to survive and thrive.

Which is why one of the first things Bryan Thompson, the new COO at Jacobson Window Company, did was replace their financial management systems.

When Bryan arrived over a year ago, Jacobson Window was using DacEasy to track all their financial information. "The system would more aptly be called DacDifficult", says Bryan. "It was difficult to get the information we wanted out of it, and it was so difficult to use, we basically only had one employee who knew how to use it."

Customer Profile

- Window manufacturing and installation company based in Tampa, FL.
- Custom windows, glass doors, and shutters.
- Locally owned with roots stretching back over 50 years.
- 30 employees.
- Switched from DacEasy to QuickBooks Enterprise Solutions in July 2008.

" Enterprise Solutions is helping us get there, by getting everyone the information they need, easily. That leaves me more time to focus on things like strategy and growth."

Bryan Thompson, COO
Jacobson Window Company

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Enterprise Solutions the right fit

Jacobson Window selected Enterprise Solutions: Manufacturing & Wholesale Edition, to replace the DacEasy system. They considered Microsoft Dynamics, but couldn't justify the high difference in price when they saw what they could achieve with Enterprise Solutions.

"We chose Enterprise Solutions for the cost and ease of implementation, definitely," says Bryan. "We also didn't want to spend a fortune training people."

Jacobson Window hired Denise Magee, a QuickBooks Advanced Certified ProAdvisor® since 1999 and authorized Intuit Solution Provider, to help out with the implementation. "There were some significant challenges in our data conversion — we had a 15-page Chart of Accounts with a lot of nesting to convert, for example," says Bryan. "We worked with our accounting firm and Denise to simplify that. She did a great job, making the implementation as easy as it could be."

"We pride ourselves on providing the level of expertise that companies like Jacobson Window are looking for," says Denise. "We have 12 years' experience working with QuickBooks solutions for businesses — we understand really well how Enterprise Solutions can best serve their needs."

Streamlined system could be saving $60,000-70,000 yearly

Jacobson Window went live on Enterprise Solutions last July, and now has easy access to their critical financial information. "Because of the complexity of the DacEasy system, much of the management of finances used to be done outside the software," Bryan explains. "I estimate we're saving at least $60,000 to $70,000 by doing away with those complicated procedures."

Jacobson Window is now in the process of integrating a third-party inventory management application designed specifically for their industry to manage their inventory. They've also implemented a document scanning solution that they found on the QuickBooks marketplace called SourceLink.

"Enterprise Solutions integrates much more easily with other applications," says Bryan.

Getting a window on their business operations

Employees across the company are now empowered to make better decisions and are set to improve productivity. "On our last system, employees had to hunt through filing cabinets for various bits of information," Bryan says. "Now everything they need is available with a few clicks of the mouse."

With Enterprise Solutions, Jacobson Window now has the agility to respond quickly to changing conditions. "The ability to get all this information has been essential," Bryan concludes. "I've had to learn the window business very quickly in this past year, and having all the information I need in one place has been critical to monitoring and improving the health of this business."

> "We really like the capabilities we have now to look at data in different ways, especially the ability to easily extract data into Microsoft Excel or Access. We see tremendous potential for increasing productivity using the data and reports available in Enterprise Solutions."
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> Bryan Thompson, COO
> *Jacobson Window Company*