

## Product

Maxwell Systems Management Suite

## Company

Taylor Plumbing  
Wheeling, IL

## Industry

Taylor Plumbing offers a full array of plumbing services to the greater Chicago land area including backflow, service, construction, irrigation, and more.

## Challenges

The contractor was building workarounds to use its old accounting and project management software that wouldn't do what they needed it to do. They suffered slow processes and additional expenses and continued to lack the capabilities important to managing projects and servicing clients well.

## Solution

Taylor Plumbing now uses Maxwell Systems Management Suite as its accounting and project management software, designed specifically for contractors with service as all or part of business. Taylor chose Management Suite because of its robust functionality and ability to be customized to fit their unique business needs.

## Results

Using Management Suite, Taylor Plumbing can improve processes and speed workflow. Not only can the contractor now more effectively track what needs to be done, but can properly handle job costing, have invoicing and collections at-a-glance, manage payroll in-house, and use a customized dispatch board. Plus importantly, Taylor can generate work order tickets for the technicians, keep track of employees' time for payroll, track purchase orders, and much more. The company saves significant time using a solution that specifically fits their needs and includes features that help across their entire process.



## Management Suite

Maxwell Systems Case Study

# Taylor Plumbing

Taylor Plumbing, a third-generation company, marks 2014 as its 100<sup>th</sup> year in business. Over the years, the company has adapted to trends, conditions, offerings, and more to remain competitive. As one of the largest service-oriented companies in the northwest suburbs of Chicago, this family business has leveraged the power of technology to help better manage its business in recent years.

Its first attempt at using accounting and project management software left the contracting company still needing more. Operations manager, Sandra (Sam) Kitto, explained that the software they were using just wasn't doing what they needed it to do and they sought a better solution. In 2000, Taylor Plumbing selected Maxwell Systems Management Suite. The accounting software for service management was chosen because of its robust functionality, as well as the ability to customize the software solution to specific business needs.

Taylor Plumbing is primarily a service plumbing company, fixing everything from leaky faucets for home owners to backed-up drains for commercial clients. Management Suite has allowed the contractor to streamline its workflow across the organization and improve control of operations.

The software solution's Service Management capabilities enable Taylor Plumbing to generate work order tickets for the technicians, keep track of employees' time for payroll, track purchase orders, and much more. "It also does a great job of keeping track of clients, client sites, and provides us with the ability to move those sites around," said Kitto. The firm works for a number of management companies that manage facilities and frequently sell their buildings. When a site is sold, Taylor Plumbing uses Management Suite to take the site information for that building and, within just a few clicks, transfer the history and other site information over to the site's new owner.

## From End to End

In addition to its traditional plumbing services, one-third of Taylor's business is providing backflow services. The company tests over 10,000 backflow devices each year. These devices are mandated by the state to be tested each year and the individual villages enforce the regulations. Management Suite provides Taylor Plumbing with the capability to generate reports of which devices are due to be tested in the next 30 days, for example. It automatically creates work orders, monthly reminder post cards, follow-up reports, delinquent reminders to the customers when they are past due, and delinquency letters to the municipalities when customers choose to not have their devices tested.

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“It has automated this process for us,” said Kitto. “If we have 25 sites in a certain village that need testing and 10 do not have it done, the system will generate a report to that village with the list of those 10 sites. It is a real time-savings and cuts down on paper and postage as well.”

Saving time is accomplished across many processes, as Kitto explains: “Management Suite does a great job of managing this process for us from beginning to end. Since this is a unique business, we were able to customize Management Suite specifically to fit our needs and make it very useful for us. I love it. It is really amazing what it is able to do for us — helping us to track what needs to be done from month to month.”

It doesn't stop there. Kitto described how Management Suite is also used by accounting to generate work tickets and produce invoices for its services. By emailing invoices, the plumbing contractor is able to save even more time, paper, and postage. “Because it is all in Management Suite, it is all married together and we are able to do everything from getting our men to work in a timely fashion, all the way through invoicing the clients. It's perfect. We love it.”

## Automating Payroll and Improving Job Costing

Prior to using Maxwell Systems Management Suite, Taylor Plumbing outsourced to a payroll service for additional overhead expense. Now, with Management Suite, payroll is easily handled in-house and the contractor no longer needs to do its union reporting by hand. Plus, the company can record work and calculate earnings, benefits, fringes, insurance liabilities, and taxes, as well as print checks and update all costing and financial reports right in the system.

According to Kitto: “Management Suite really helps with job costing. If all of the employee timecard information is entered into the solution with the correct task code — whether it's for generating a proposal, doing demo work, for installing, or for site cleanup — we are able to tell if we underbid or overbid a job and see our percent of profitability on the job as a whole.”

## Valuable Information at a Glance

As operations manager, Kitto also shared her thoughts on Management Suite's Business Center. “I use it daily. It provides a quick customized view of how much invoicing was done the previous day, how much we owe in AP, and other specific details that are good for us to see at a quick shot. We can also look at aging and see how the collections department is progressing on their end. This is good information to have at my fingertips.”

This quick glance is also valuable for the current owner, grandson of the company's founder. Although he has retired, he is still very involved in the business. He lives in Arizona, but is able to access Management Suite via the Internet to stay up-to-date on the daily operations.

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## Customizability

Kitto mentioned the value of customization multiple times. She has been extremely impressed with the team in the Maxwell Systems custom development department. They were able to tweak the Dispatch Board so Taylor Plumbing could have pertinent information for their unique business on the first screen, which is critical for the firm's backflow services.

Backflow devices can be used for irrigation systems, drinking water, dialysis machines, and other systems to prevent contaminated water into a clean water supply. "Now, when we're on the phone scheduling work for a client, we can see if it's for dialysis or for a restaurant where water can't be turned off. This little piece of information that we were able to add to our Dispatch Board is invaluable to serving our customers."

She also added that she has participated in a number of training sessions and Annual Conferences hosted by Maxwell Systems and has never been disappointed.

Although Taylor Plumbing has been using the system for more than a decade, Kitto concluded that "There is always room for growth and each year we are able to take advantage of more of the product. I love the thought that we are able to continue to grow right into the software that we already have."

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