

Integrated Estimating and Accounting Software Helps Schuler-Haas Electric Corp. Grow Profits and Locations



Schuler-Haas Electric Corp. is a fully licensed and bonded Union Electrical Contractor headquartered in Rochester, New York. Started by Jack Schuler, George Haas and Joyce Donnelly in 1961, the company grew and reached a milestone in 2000 when Dan Streicher and Edward Schuler took over the

business and moved to a larger facility. Schuler-Haas now has 50+ years of quality workmanship and dependable service as its reputation, with three satellite offices serving most of Western New York. The company provides services for every stage of electrical construction, including design-build and LEEDS projects, for industries including commercial, industrial, fiber optics, clean rooms, manufacturing, institutional, retail, data centers, and healthcare.

With six or seven handling the estimating process in its Rochester office and two or three in the company's other locations, Schuler-Haas was experiencing many frustrations due to duplicate data entry with too many hands in the pot and no rules or standardization for entering information into their system. In addition, there were translational issues because data had to be duplicated again into their accounting system.

Peter Longhany, Chief Estimator at Schuler-Haas explains: "We were using Timberline/Sage for accounting and Constructware/Autodesk for project management. The programs didn't talk to each other, leaving room for error and making it hard to run reports. Reporting was really tough with Timberline - it had lots of features but was not user-friendly and required us to print out much of our information to use it. Plus, having the gap of separate systems meant we had no real-time data, so invoices and billings were not entered in a timely way; entries might be in accounting but not in project management for approvals. We wouldn't have what we needed for profit projection because of the disjointed systems. It was frustrating and time consuming. We weren't as profitable on projects as projected and would find large discrepancies, but couldn't see it until it was too late to do anything about it."

Under One Roof

With things not working to their interests or advantage, Schuler-Haas sought a better way. "Through conversations with PMs and admin staff about data entry, we realized some

CUSTOMER OVERVIEW

Contractor:
Electrical Contractor

Headquarters:
Rochester, NY

Employees:
250

Viewpoint Customer:
Since 2009



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things were getting touched two or three times," says Longhany. "That is not good because clearly it can lead to mistakes, leave room for error, and waste time. So we looked for ways to consolidate. When we got an email invitation to see a demo of accounting and project management software that worked with our estimating software, we did some research and jumped in."

Schuler-Haas was pleased with the estimating software they'd been using since 2009 - Viewpoint MEP Estimating (formerly Estimation) - and were eager to see how the ProContractor by Viewpoint solution integrated with their estimating system to streamline workflow across the entire process.

"We got everything under one roof! And having our software work together and supported by one very cooperative vendor has made a lasting difference to our company and our growth. We have expanded every year in terms of volume and geographically, and that wouldn't be possible without an integrated system accessible by everyone, across all offices," says Longhany.

Schuler-Haas has a much more simplified process using compatible programs across departments. When the contractor gets a project, it's assigned to an estimator who sets up the job in the system. That step alone is so easy because users can sort by estimator and pull up his/her specific projects, which is valuable since the company does a lot of work for Cornell University and can keep details organized easily. We also create assemblies and use menu-driven features to get details into the estimating system. According to Longhany, "When takeoff is complete, the estimator follows up on pricing and 95% of what you need is in the database, so it's easy to look up and find what you need." When the estimate is ready, then the preliminary summary is produced, reviewed, checked for any omissions, and fine-tuned before it's sent to bid summary for compiling of final numbers. The final bid step is managed with ease, whether for private or public work requiring quote letter, bid form, etc.

"If successful on a bid, then the data flows into ProContractor," says Longhany. "If budget is over a certain amount we've set in place, then we break down into cost codes and export to accounting and can revise them further to reflect how work is to be done in the field."

Everyone Saves Time

With an estimating solution that's tailored to the way electrical contractors work and a seamless process into their accounting and project management software, Schuler-Haas is saving time again and again.

"With our old way, we would have a bid done a day early because we'd need that time to check our math and rework if needed," recalls Longhany. "Now we're done in minutes, thanks to extensions feature and all the calculations done electronically."

He adds, "Change orders are now able to be scrutinized because we have the systems to cost it, the data is directly input to accounting to develop the CO, and we have a way to make it all very

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professional-looking to put into customer hands. It's just one way to see the big advantage of having everyone on the same page, looking at the same data, having confidence in what we do."

Longhany also believes that the Viewpoint solutions allow the company to free up significant amounts of administrative time on data entry. One employee was doing a lot of entry-type work and now they're doing more strategic tasks, like reviewing costs on job, monitoring activity on jobs and where things stand, etc. He says, "Using this system allows us the chance to take on different responsibilities and look into deeper financial activity that we might not have had time to before."

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