

CUSTOMER SUCCESS



Clean Solution for Cook Siding and Window Co., Inc.

During the first five years after she joined Cook Siding and Window Co. in 1991, office manager Pamela Davis dreaded Fridays. “I left for home each Friday evening in tears, because that’s payroll day,” said Davis, who struggled hopelessly with the manual-entry accounting system the company had been using since its establishment by her father, Joe Cook, in 1954.

Bogged Down by Paperwork

Over the years, the firm had slowly built a name for itself installing exterior siding, windows, doors, trim and soffits, awnings and gutters. But as the business, staff, and inventory grew, the bookkeeping department struggled to keep pace with a cumbersome paperwork trail. After Pam’s sister, Teresa Dickson, wrote sales orders, her brother Kyle ordered materials, scheduled installation jobs and filled out a “paysheet.” From the paysheet Pam would manually calculate material and job costs including estimated labor, tabulate sales commissions, and produce invoices. She also managed accounts payable and accounts receivable, but by far the greatest challenge was payroll.

After checking individual “installer sheets” from which she’d enter the amount of time each installer spent on each job, Pam then had to consult individual Federal and Virginia tax charts, calculate health and life insurance contributions, garnishments, advances, and other deductions for each employee, by job. It was a grueling process.

“On Fridays I’d come in at 7 a.m. in order to get payroll done by the end of the day,” said Pam, who thrived on aspirin. “Trying to keep up with payroll, job costing and invoicing was just more than I could handle.”

Streamlined Efficiency

Pam and Joe realized the answer to their problem was right at their fingertips. Although they had a computer, they were using it only for word-processing functions. When they described their problem to their computer consultant, he recommended Sage BusinessWorks. After only one demonstration, Cook Siding was convinced that Sage BusinessWorks was the answer to their problems.

Customer:

Cook Siding and Window Co., Inc.

Industry:

Sales and installation of commercial and residential siding and windows

Location:

Salem, Virginia

Number of Locations: 100-mile radius

Number of Employees: 39

System:

Sage BusinessWorks

- Accounts Payable
- Accounts Receivable
- Cash Management
- General Ledger
- Inventory Control and Purchasing
- Job Cost
- Payroll
- Order Entry

CHALLENGE

Replace manual, paper bound bookkeeping system with an automated, integrated, accounting and payroll system.

SOLUTION

Sage BusinessWorks with Job Cost and Payroll modules.

RESULTS

Payroll reduced from an all day chore to a 45 minute task; streamlined integration of sales orders, job costing, accounting and payroll; seamless data flow replaced inefficient, paper trails.

Pam, who had minimal computer skills, became an accomplished Sage BusinessWorks user within a few weeks. "It took me very little time to do pretty much anything I wanted to do," she said. Now that she, Teresa, and Kyle are linked electronically, the paperwork transactions that once wore Pam's shoe leather thin are now handled through Sage BusinessWorks.

"Our office is so much more relaxed these days," smiles Pam. "Now when a salesperson brings in a contract, I record the information in Order Entry and Job Cost. Order Entry gives me a sales order number, which I then enter as a job in Job Cost. The order information is prepared for the person who maintains material lists, and that's used to order all the supplies and materials we'll need for each job." When Pam receives invoices from material suppliers, she compares them against figures quoted in Job Cost before entering them into Accounts Payable. "As customers pay us, I update Accounts Receivable and deposit funds." But nothing is easier for Pam than payroll.

"Payroll is linked to sales orders and job numbers. I simply apply the information from the installer pay sheets into the Payroll module," explained Pam. "I just punch a couple of keys and all the deductions and tax calculations are performed and are automatically sent to Job Cost. I now finish payroll in 45 minutes. I don't have to worry about keeping up with paperwork anymore. Sage BusinessWorks takes care of that for me."

Now, the aspirin bottle is absent from Pam's desk. "On Fridays, I can go home in a good mood, because it's just another day. I'd highly recommend Sage BusinessWorks to anybody."

At Cook Siding and Window, Sage BusinessWorks makes a clear difference.

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ABOUT SAGE SOFTWARE

Sage Software supports the needs, challenges, and dreams of more than 2.7 million small and mid-sized business customers in North America through easy-to-use, scalable, and customizable software and services. Our products help manage a complete range of business functions including: accounting, operations, customer relationship management, human resources, time tracking, merchant services and the specialized needs of the construction, distribution, healthcare, manufacturing, nonprofit, and real estate industries.

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