

Customer success story
Airfirst Air Conditioning
& Electrical

Industry
General Services

Location
Australia

Greentree product suite
Financials
Distribution
Job Costing
CRM
Approvals & Alerts
Payroll

AIRFIRST TURNS UP THE HEAT WITH GREENTREE

BUSINESS BENEFITS

- Significant reduction in data double-entry saves one day per week in administration time, enabling more time on business analysis.
- Automated serial tracking and inclusion of all materials in stock take improves accuracy and reduces stock take time from two days to two hours
- Integration and single-source data entry ensure all job costs are captured and allocated to jobs. Project Managers have greater visibility of costs, which translates into more accurate job costing.
- Greentree's strong contracts management capability enables greater scope for growing this aspect of the business in the future. This was a key consideration in the buy decision.
- Service contracts for maintenance are now scheduled for off-peak periods during the year. This has replaced unproductive downtime and helped smooth out annual business revenues



“Greentree was the best possible fit for our business based on price and functionality and we can add modules as we grow. Apart from that, having all our business information in one accessible place just makes life so much easier.”

Beth Borzi, Administration Manager, Airfirst Pty Ltd

Beth Borzi, Administration Manager at Airfirst Pty Ltd, found salvation from the time-wasting inefficiency of disparate systems when Greentree eliminated the need for data re-entry.

Business situation

Airfirst are air conditioning and electrical contractors undertaking installation, services and project-based work for domestic and commercial customers in the North Queensland region. The company had been struggling with two disconnected systems, which required every transaction to be extracted from Smart Trade and re-entered and modified in MYOB. Beth describes the situation as “crazy” and

that’s before the amount of time wasted trying to maintain a manual stock book is included in the equation.

Paying staff was a major headache since payroll wasn’t integrated with job costing, so data needed to be re-entered. This predisposed the system to error, so accuracy in the capture of all job costs couldn’t be guaranteed.

Greentree chosen over industry-specific ERP systems

Having spent at least three years looking for an appropriate replacement, Beth recalls evaluating all the usual suspects. This included Microsoft Dynamics and SAGE alongside project and service industry-specific software from iPROsoft



among others. Greentree was chosen because it is a fully integrated, flexible single source system capable of scaling to meet the company's future needs. It also offered a strong contracts management capability which would allow Airfirst to proactively manage and grow the service and maintenance component of the business.

Pinpoint accurate Job Costing

Since Airfirst is a project and services-oriented organisation, job costing needs to be pinpoint accurate to ensure the company remains competitive and profitable. Beth explains how costs had to be entered into Smart Trade, then extracted and re-entered in MYOB: "This was a ridiculously tedious and time-consuming process, but it was the only way we could keep track of costs and allocate them to the job before invoicing. Greentree's integration, and specifically having a fully integrated payroll system, has been invaluable. I now know that all relevant costs are being captured and allocated against jobs."

Since Greentree is a single source system, data is entered only once but can be easily viewed by all authorised users. Airfirst Project Managers now have much greater visibility and control of project costs, which has translated into more accurate job costing.

Administration reduces 52 days per year

There have been several flow-on affects of not having to double-handle data entry between two disconnected systems. Beth estimates that she's spending at least a day a week less on data management tasks and more time on financial analysis and specifically, looking more closely at chargeable and non-chargeable time. For example, Beth has been able to make more productive use of downtime, which wasn't contributing anything to the business bottom line.

Downtime now contributes to bottom line

With a good proportion of the business's revenue coming from service contracts, Beth uses Greentree to schedule maintenance during periods of downtime. This is usually outside the busiest period of the year, between November and February, when homeowners need to keep cool in the hot Queensland summer. Beth says this has helped her better manage cash flow by smoothing out the business revenue over the duration of the year. Now, downtime actually contributes to the bottom line and Greentree provides the tools to grow this part of the business in the future.

"From an administrative point of view it's certainly much easier to manage than it ever was," says Beth. "Things don't get missed because we've got them all set up as recurring events. Our maintenance schedule is constantly growing, so it's absolutely important to have a decent system to cope with the amount of information and to ensure that we're not losing out on revenue."

Stock take time reduced from two days to two hours

Beth explains that previously, materials such as copper piping and wiring simply weren't included in a stock take. This was because Smart Trade & MYOB didn't have the capability required to store the information. Each year, the business installs around 1100 units consisting of 2200 parts and serial numbers, which Beth says presented another logistical nightmare. All this had to be recorded in a manual stock book.

When Greentree's Serial Tracking automated the tracking of units, the stock book was quickly ditched. A stock take now includes all materials and is completed in approximately two hours, rather than the two days it used to take. Airfirst now has much greater control, with significantly improved accuracy.



Airfirst are air conditioning and electrical contractors undertaking installation, services and project-based work for domestic and commercial customers in the North Queensland region. For more information contact Airfirst Aircon on **+61 (0) 7 4041 2141**

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