

E&M Machinery Gears Up for Success with Workflow Resources

Success Story

The Challenge

Cumbersome manual data entry within multiple systems made it impossible for E&M Machinery to convert customer quotations into new orders, costing them at least 32 hours every week in time and inaccuracies within the system.

The Solution

Workflow Resources implemented a customized upgrade of Sage Pro ERP 7.4 to streamline the customer quotation and order entry process.

The Result

E&M eliminates the need to conduct manual data entry, saving 32 hours every week with the ability to gather more accurate data.

E&M Machinery is California's leader in Automation, boasting an extensive customer base including Chevron, the City and County of San Francisco, Lockheed, Pacific Gas and Electric and many more. Their 50-year history of successful projects and satisfied customers has established them as the "go to source" for automation solutions in California.



E&M Loses Power under the Old System

What started as a small, family-owned business in the 1950's, has since grown to a multi-million dollar company. With their continual growth and desire to reach new and competitive markets, E&M Machinery was in dire need of upgrading their accounting and inventory management software so that they could better manage their business. Steve Deas, President of E&M Machinery recalls that, "20 years ago, we recognized that our company would have to embrace changes in technology in order to grow. Our services range from not only providing and selling parts, but also customizing factory automation machinery for distribution, which required us to re-evaluate the existing system being utilized to manage the diversity of our operation." In 1989, E&M took their first big steps toward modernizing their technologies when they transitioned their SBT brand Macintosh-based software to a new Unix-based System. In the mid-90's they upgraded again to the user friendly Windows-based software solution, Sage Pro ERP and have been managing their operation with it ever since. "The software is great for continuing upgrades," Steve comments, "We've been able to convert all of our historical data and custom reports throughout every upgrade process."

Most recently, E&M recognized the need to upgrade to the current version of Sage Pro ERP 7.4. "Under the old version, we did not have the ability to send a customer a quote, and then later turn that quote into a sales order," Steve recalls. "We had to do manual data entry multiple times just to fulfill the order request, which inevitably resulted in errors. We needed a customized solution that could streamline that process, and eliminate the time spent on redundant data input, which in turn would increase the accuracy of the information within the system." E&M Machinery has shared a longtime relationship with the team at Workflow Resources, who have been involved in their system upgrades since the Macintosh and Unix conversion. Once again, E&M turned to their partners at Workflow Resources, relying on their technical expertise to customize solutions within Sage Pro ERP 7.4 to improve their business operations.

Workflow Resources Takes E&M on a Smooth Ride

David Platt, President of Workflow Resources states that "we have been dramatically involved in understanding the nature of E&M's business operations from the beginning, which allowed us to recommend an appropriate software solution. E&M not only provides products, but they offer specialized services as well, all of which are tracked and maintained on multiple systems. It was imperative to integrate the information captured within these systems into the new solution while maintaining an informational link between them. The beauty of working with Sage Pro ERP is that the software is extremely flexible and can be customized in a variety of ways to meet the needs of our clients."



WORKFLOW RESOURCES, INC.

"We used to have four sales people dedicated to transferring quotes to orders at least one day a week. Now, we have completely eliminated that need, saving us at least 32 hours every week!"



E&M Machinery

www.enm.com

Company Profile

Type of Business

Factory Automation

Headquarters

Healdsburg,
California

Other Location

San Francisco

Other Information

70 Employees

System Profile

General Ledger
Accounts Payable
Accounts Receivable
Purchase Order
Payroll
Inventory Control
System Manager
Customization
Manager

With the implementation underway, Workflow Resources developed a copy of the upgraded system so that E&M could evaluate and test the functionality of the new solution throughout the entire process. Mark DaVia, Project Manager for Workflow Resources explains, "With the test system in place, E&M could recommend modifications and get comfortable with the new system before the 'go-live' date. Throughout the process, we were able to work out many of the kinks that would have otherwise gone un-noticed until after full conversion." Having tested so many of the components within the newly customized, Sage Pro ERP 7.4, Workflow Resources was then able to fully implement the upgraded solution over the course of a weekend, eliminating the need for E&M to stop business operations. "We closed business on Friday with the old version, and by Monday we were up and running with the new servers, software, modifications and database, and we didn't lose a single day of business," Steve remarks.

Powerful Results Surge Productivity

Leveraging their technical expertise, Workflow Resources customized and modified Sage Pro ERP 7.4 enabling E&M Machinery to save time and money as a result of the functionality of the upgraded solution. "The new solution now has the capability to link with the company's intranet site, allowing employees to extract information related to order processing or financial services," Mark explains. "As a result of this, employees are able to provide a much greater level of service to their customers who call inquiring about an order or bill. This information is easily obtained in an efficient, accurate and timely fashion, satisfying the needs of that customer and eliminating the time that it used to take to track down the information."

In addition, Workflow Resources customized a solution that reduced the time-consuming manual data entry and eliminated the inaccuracies associated with turning customer quotes into new orders. With a new import tool in place, E&M no longer had to re-type existing proposals into the new system to fulfill an order. "We used to have four sales people dedicated to transferring quotes to orders at least one day a week, but now, with the new solution, we have completely eliminated that need, saving us at least 32 hours of time every week!" Steve exclaims. "The services and products that Workflow Resources provided over the years has allowed E&M Machinery to go from a 15 million dollar company to a 20 million dollar company without having to add any new staff," continues Steve... "and the solutions they continue to offer us are enabling us to move from a 20 million dollar company today, to a 30 million dollar company tomorrow." The team at Workflow Resources has provided ongoing support over the years, allowing E&M Machinery to reach optimal success in achieving their business and financial goals.



WORKFLOW RESOURCES, INC.

To survive, compete, and succeed today you need great enterprise software. Workflow Resources, Inc. can help. After 20 years in the business we have learned that making your mission-critical software work for you requires three key ingredients: The Right Advisor-Expert Reliable Service-and Great Software. Since 1988, we've helped our clients save time and money. Let us show you how we can help you, too.

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