

## SUCCESS STORIES

# Advanced Field Services Company Streamlines Accounts with Acumatica ERP



“Crestwood was solid. We went through some company turnover in the middle of our implementation and I credit them for getting us through it all”

- Director of Business Systems



## The Challenge

Since 2003, our client has been a leader in advanced field services and solutions that empower utilities to make the most of their infrastructure investments. Specializing in gas, water, and wastewater leak surveys, their work is dedicated to improving the safety, sustainability, and reliability of the nation’s energy assets and natural resources.

Our client was using QuickBooks to manage projects, which lacked many capabilities the account management and finance team needed. Because of the nature of their business, customers are primarily contracts with municipalities, utilities, and engineering companies. Each company might have dozens of projects that need to be billed separately. QuickBooks was incapable of capturing the right data in the right place. Billing for services was overly complex, as some customers might have 10 projects. The team was supplementing the program with Excel spreadsheets and an Access database, creating more work and losing the ability to track costs in a timely way. Further, there was no centralized way to track an extensive inventory or equipment.

### LOCATION

National

### APPLICATION REPLACED

QuickBooks

### SOLUTIONS

Acumatica Cloud ERP

## The Solution

The team knew they had to migrate to an ERP system. Though many at the organization had ERP experience, no one was familiar with Acumatica ERP. Once they understood its powerful capabilities, the team knew it was a right fit. They liked that it's on a future-proof platform with open architecture for rapid integrations, scalability, and ease of use. Acumatica would enable easier manipulation of data and accounting insight that was so lacking. Because of the extensive wear on the company's physical equipment, sending items out for cleaning and repair and then tracking available inventory was overly complex and unreliable. This ability to centralize inventory was another key need that the new ERP system would solve.

### Key Results

- Provided insight to labor costs
- Created exceptional efficiency in billing
- Centralized data operations and inventory

## The Outcome

Now when team members out in the field clock in or out of a project, that information flows into Acumatica, so the accounting team gets weekly updates of the cost of labor. That data and other essential information lives in a custom interface they call Command Center. There, all data points are collected, reviewed and released for billing through Acumatica. Crestwood's client a director of business systems said, "I was leery of an ERP system I had never heard of, as I've been in the industry so many years. But I really like it, as does our CFO. I've been impressed. Acumatica is very user-friendly - more user-friendly, than SAP.

Client also notes, "Basically, what was an arduous recreation of the wheel each month, is now just, an update to a link and everything's prepared for you. So that's been huge."



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