

Sage 300

Construction and Real Estate

Customer Success

Accordant Heats Up Operations for Heritage Mechanical Services

Heritage Mechanical Services, Inc. (Heritage), a subsidiary of EMCOR Group, Inc. provides heating, ventilation, and air conditioning (HVAC) services for new construction in highrise apartments, laboratories, and office space, primarily in Manhattan. With over \$70 million in annual contracts, Heritage is one of the leading HVAC contractors in the New York Metropolitan area. To help it manage its contracts successfully, Heritage relies on Sage 300 Construction and Real Estate and Accordant Company, LLC.

A Long-Term Solution

The company had been using proprietary DOS-based software. Frank Schumacher, chief financial officer, describes concerns the management team had about the software, "The technology was not keeping up. And a single option for support made us a bit nervous. The programmer patched the software to get us through the change in millennium, but we began searching for a more robust, easily supportable solution for the long term."

Schumacher says he was immediately impressed with Sage 300 Construction and Real Estate, but because other of the EMCOR subsidiaries were using Shaker COINS and Star Builder it seemed logical to choose one of those solutions. "Sage 300 Construction and Real Estate really had to bowl us over to win out over the other software packages — and it did. We felt that the future of Sage 300 Construction and Real Estate looked brighter. We were searching for a solution for the long term and Sage 300 Construction and Real Estate is a dynamic product that keeps moving forward."

Smooth Transition

Schumacher attributes the smooth implementation to the talented consultants at Accordant. "Accordant was extremely helpful," he says. "They planned out the entire process, wrote essential reports, and anticipated and precluded any hiccups. They proved their value over and over again. I highly recommend them."

To provide for a smooth transition and ensure staff could be productive from the start, Accordant migrated select data, such as cost records, from the old software into Sage 300 Construction and Real Estate. "They value-engineered the data migration," Schumacher says, "saving us time and money."

Real-Time Project Information

Effective project management is a key element behind Heritage's success. The Project Management component of Sage 300 Construction and Real Estate helps the company reduce overhead and maximize the profitability of every project.

"We use Project Management to create and track common project documents, such as Requests For Information (RFIs), change orders, meeting minutes, submittals, and transmittals," explains Schumacher. "Our team can easily find and review any project-related document. They can see

Customer:

Heritage Mechanical Services, Inc.

Industry:

Mechanical Contracting

Location:

Deer Park, New York

Web Site:

www.heritagemech.com

System:

Sage 300 Construction and Real Estate



Accordant

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Maryland

Connecticut

Michigan

Pennsylvania

Ohio



which RFIs haven't yet been approved and gauge the potential impact of any outstanding requests on a project's cost and schedule."

Effective Cost Control

Sage 300 Construction and Real Estate Job Cost is an effective cost control tool that Heritage's management and staff relies on every day. Contract amounts, estimates, costs, subcontracts, purchase orders, customer information, billings, and other project information is tracked in as much detail as needed. By maintaining the percentage complete of each task, Heritage is able to closely monitor its budgets, eliminating surprise cost overruns.

"Job Cost provides us with complete control over commitments and change orders that affect our jobs," says Schumacher. "Change orders can make or break a project, and using Job Cost we're able to manage every step of the change order process—from pending through approval — to ensure profitability."

Streamline Payroll

The Payroll component of Sage 300 Construction and Real Estate handles even the most complex union payrolls with ease.

Labor is tracked by job and by task within the job, allowing Heritage to closely monitor its labor budgets compared to actual expenses. "It all flows into Job Cost so we've got a complete picture of the costs associated with each job," Schumacher notes.

Reaping The Benefits

"The single biggest benefit we enjoy with Sage 300 Construction and Real Estate is the easily available data and the flexibility we have with presenting that data," says Schumacher. "The report writer makes any report possible. We're able to look at a single task for one job or across all jobs. We can isolate a week, a month, or look at the life of the job. Quick access to that information helps us react quickly when needed."

Schumacher also praises the strategic advice he receives from Accordant's consultants. "Accordant is well worth the money," he concludes. "Their advice and recommendations for using the software have generated great results for us."

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Frank Schumacher
chief financial officer
Heritage Mechanical Services, Inc.

About Accordant

Accordant provides leading-edge business solutions to construction, service and real estate businesses in the Northeast. Accordant specializes in the implementation, consulting, and training of Sage 300 Construction and Real Estate and Sage 100 Contractor Solutions. From strategic planning through implementation and deployment, Accordant applies real-world experience, best practices and a client-centric focus to deliver technologically-advanced software solutions that dramatically improve business performance. With over 4,000 clients, Accordant is uniquely qualified to provide your company software and services in the areas of Accounting, Document Management, Estimating, Project Management, Property Management, and Service Management. Accordant will help you maximize efficiency within your company and make it easier for you to do business with your customers, vendors, employees, and partners.