

Integrated Business Group

“The team of people at IBG has this rare combination of technical and accounting expertise. And the system pays for itself over time.”

**—Katie Gentry, Controller
FAS Windows & Doors**

Measures of success:

- **Great Plains is customizable, allowing it to grow as FAS does**
- **Accurate tracking of job costs and reorder costs, increased inventory control**
- **Top-notch training and customer support are always available**
- **Employees can now create and pull reports with ease**

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IBG Helps FAS Windows & Doors Shut Out Accounting Confusion

Location: Winter Park, Florida

Industry: Construction, Home Improvement

The Challenge: FAS had inventory control issues and couldn't get an accurate cost out for jobs. They bought software from another VAR to handle these problems, but the vendor could not deploy it properly.

The Solution: Integrated Business Group (IBG) introduced Microsoft Great Plains, along with third-party software, including Encore Project Tracking and SmartList Builder

Results: Now the company deals with significantly fewer reorders and paperflow issues, and they have more efficient inventory control and are able to provide precise bids. IBG also introduced a slew of standardized processes, all of which provide FAS with significant time and money savings.

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FAS Windows & Doors has successfully provided custom homebuilders, small contractors, remodelers, and retail consumers in Orlando and Tampa, Florida, with windows and doors from multiple manufacturers since 2005. But within the headquarters' four walls, accounting issues were causing inefficiencies.

A year later, Katie Gentry was hired as a staff accountant. She watched the company's foibles with great concern. "We were using QuickBooks," Gentry explained, "and quickly realized we needed something more capable of handling the complexity of our business." The software wasn't helping FAS with inventory control (QuickBooks only has an average costing inventory method, she explained, and not every product cost the same). It was very difficult to get an accurate cost for jobs. "We do between 550 to 600 jobs a year," she said. "Job profitability is the lifeblood of our business." At the time, reps were doing hand-calculations in Excel and couldn't pull any reports, either. Plus paperwork, which would travel in job jackets from the sales department to finance and ordering, would sometimes get misplaced.

The company began searching for a new accounting program and a software partner to work with, eventually choosing Microsoft Great Plains (GP) and one of Integrated Business Group's (IBG) competitors. "At the time, that did not work out well at all," she said, explaining that the company they hired failed to get the software installed and working. "We spent tons of money with them over the course of a year and got nowhere," she said. So when Gentry was promoted to controller in September 2007, one of the first things she did was fire the current value-added reseller (VAR) and hire IBG.

She explained her company's concerns to them and the team got to work. IBG went through the company's entire workflow process, from leads to invoicing. "They helped us standardize our processes and took the time to understand our business," Gentry said. "They helped with our warehouse and the general flow of paperwork. In three months time, they had the software implemented and working."

"Once they did the implementation, they were here for about a week. It was really non-eventful." The company sent some representatives to IBG's offices for training classes, but many employees took advantage of online learning opportunities, which afforded them the luxury of learning at their own pace. "Our employees really responded very well," Gentry reported. Eight of FAS' 40 employees use the software. "We immediately saw a lot of benefits," she said, specifically citing a decrease in the number of reorders. "It was important to teach everybody that every penny spent must be properly accounted for."

Since then, IBG also introduced SmartList Builder to search data within the company's existing SQL platform (reporting features are exportable to Excel) and Encore Project Tracking, a third-party add-on module that works with GP and is customizable to allow FAS the ability to more accurately estimate job costs, and perform accounting and tracking.

"With the limited resources that we all have, you have to think about your business in terms of what you need the most," Gentry said. But would she recommend the software and IBG to her peers? "They're my heroes," she claimed. "The team of people at IBG has this rare combination of technical and accounting expertise. Several people who work there are CPAs. They're very knowledgeable, friendly and reliable."

And as for the software... "It may seem initially cost prohibitive, but it's a system that pays for itself over time," she said. "It's absolutely worth it."