An Extra
EMPLOYEE
Behind the Scenes

Having the right back-office software is like having a super-star employee on your team. From accounting/billing, to scheduling, to proposals and contracts — your entire operation just runs more smoothly and efficiently.

By Laura Stepanek, *SDM* Editor

In choosing the software platform for Safe Systems, President Larry Halpern observed that most of the software vendors they investigated didn't consider the whole company, but rather focused on automating only one or two aspects of it. "But SedonaOffice looked at the whole company, and how we really improve operational efficiency," he says.

The average small business owner is online for

4 HOURS A DAY.

Source: Intuit Inc.

PHOTO BY PAUL WEDLAKE
PHOTOGRAPHY FOR *SDM*

ABOVE: *Safe Systems' back-office software is linked to its central station software (shown here) so technicians can check account and alarm history without having to have an operator involved.*

The security dealer who uses great back-office software to automate his operations likens it to having an extra employee on his team — one of those super-star employees who do all the right things and make you shine. A back-office application comprises software that a company uses to administer its operations. It usually includes functions such as accounting and billing, installation and service scheduling, inventory control, management reporting, even sales management. With the right software, your entire operation just runs smoothly and efficiently, and in many ways makes your company more competitive.

Among small business owners surveyed by Intuit Inc., producer of QuickBooks, 92 percent say they use at least one software solution to run their business. "I couldn't imagine running my business without it," says Larry Halpern, president of Safe Systems Inc., Louisville, Colo. "We'd probably need double the staff."

Halpern is one of four security companies with a different story to tell about the back-office software they use and what it does for their business operations.

SAFE SYSTEMS INC.

Safe Systems uses SedonaOffice, produced by Perennial Software. "We couldn't function without our Sedona Office — it's just as important as Manitou. It used to be in the old days that the central station was the important thing, and if the back office stuff goes down, it's okay because that's not integral to your company. Now, SedonaOffice is as important to us as Bold Manitou [central station automation software]," Halpern says.

As an executive, Halpern uses the software to review important metrics, such as attrition rates, sales numbers, installation efficiency, staff utilization, and more — things that could make or break profit goals. "These are things that help us really get good at what we're doing. It never stops on what I can get out of it, but it allows me to really know what's going on in my company."

Beyond management reporting, the software is implemented throughout the entire organization, managing the ebb and flow of daily operations in sales, installation, service, accounting, and more. "SedonaOffice is the hub of everything," Halpern remarks.

"A typical day starts up with our technicians opening up their field service units (FSUs), and it tells them where they're supposed to go. Customers get emails letting them know that a technician is en route to their

Top 5 Small-Business Owners' Online Tasks

65%	Conducting back-office work, such as bookkeeping and accounting
65%	Generating invoices and/or accepting payments for their small businesses
58%	Managing relationships with existing customers
48%	Communicating with employees and business partners
35%	Advertising to build company awareness

SOURCE: "The Appification of Small Business," Intuit Developer, April 2015
www.slideshare.net/IntuitDeveloper/ebook-the-appification-of-small-business

85%
of small business executives are willing to invest more in small business software solutions over the next five years.
Source: Intuit Inc.

SDM

location," he describes. The FSUs were the cornerstone of Safe Systems' original foray into back-office automation about seven years ago, and Halpern describes his company as an early adopter.

"The field service unit runs on the iPad. It gives your technician everything as if he was logged on to the computer in our office. With the iPad, the technician is checking history on Manitou so you're not having to have an operator involved to take the system in and out of service, and to read history to the technician.

"When he gets there he marks himself on site, so now it starts the billing for the service call or leaves a time tracking. Whatever he does is entered on that unit and is updated in real time to Sedona. Let's say Chris was the last service tech out there and now Dave's there — he can see what Chris did last time. It's all right on his unit.

"When the ticket is closed we send a survey to every customer who had a service call. It's through SedonaOffice, and we have it linked to one of those online survey programs. Our invoices go to our customers automatically. So an invoice is created for you and an email goes out with the invoice.

"It's so much more efficient; there's no paperwork," Halpern says — a feature he appreciates because documents and contracts can't get lost.

"When a technician takes a part off his truck, the system knows whether that customer is covered by a warranty; it knows what the price of the part is; it knows to remove it from the inventory on his truck — and now in the office they can see what's been used off the truck and they can replenish them if they need to," he remarks.

"Several years ago, John Wrzesinski, our vice president of operations, calculated that we basically got an extra employee by putting in the field service units, because the technicians were able to increase their efficiency so much that it was like adding one extra employee — and I'm not paying the fee I would have to pay for one extra employee. But that's how much extra work we were able to get done," Halpern figures.

On the sales side, security consultants create quotes in the field using their iPads and once the quote is turned into a sale, the customer can sign the contract electronically. Halpern says the turnaround time on the sales process is much improved. "Within a very short time that order is in our order entry department and everything's in process."

Halpern likes that the software pins employees to the tasks they need to pay attention to. For

Small business owners already spend on average about $630 A YEAR on software solutions.
*Source: Intuit Inc.*

example, when a new job is entered into SedonaOffice, an email is deployed to the appropriate person to let them know there is a new job in the queue or a job is awaiting parts. When a customer opens a service ticket on the company's Web portal, an email is sent to the customer service department letting them know a new service request has been created.

"People in the office get emails letting them know what their stuff is for the day or key important

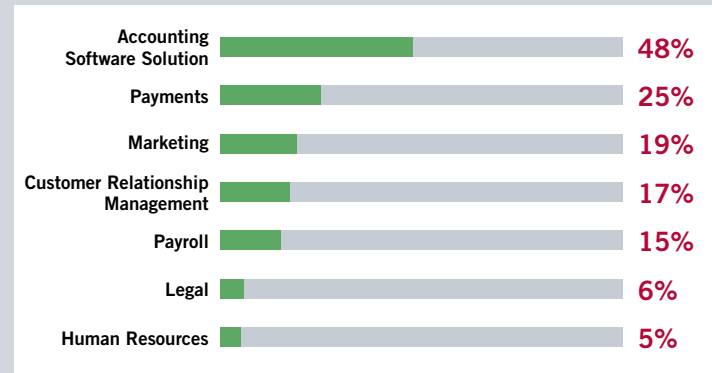## What Hardware Do Small Business Owners Use?

Virtually all small business owners (98%) use some sort of computer to run their business, and most use multiple devises.
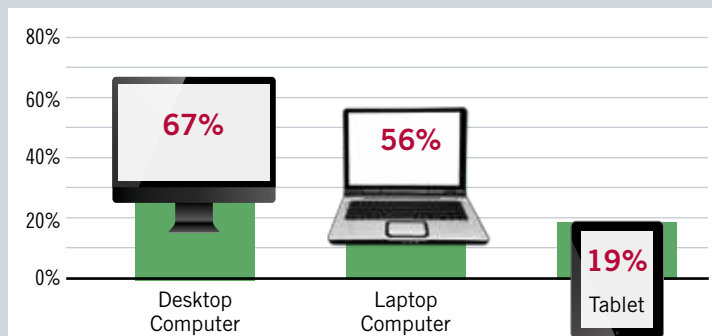
67%	Desktop Computer
56%	Laptop Computer
19%	Tablet

SOURCE: "The Appification of Small Business," Intuit Developer, April 2015
www.slideshare.net/IntuitDeveloper/ebook-the-appification-of-small-business

What Software Programs Do Small Business Owners Use?

Top software choices

Accounting Software Solution	48%
Payments	25%
Marketing	19%
Customer Relationship Management	17%
Payroll	15%
Legal	6%
Human Resources	5%

SOURCE: "The Appification of Small Business," Intuit Developer, April 2015
www.slideshare.net/IntuitDeveloper/ebook-the-appification-of-small-business

Using Cornerstone Billing Solutions, Dave Webber from ABC Burglar Alarm Systems can view a customer's account with his iPad to see if the customer is current on their bill. He also can look at past service history and when finished with the call, he can generate and email an invoice to the account.

know we're not missing a call — that the technician is where he's supposed to be — that helps our reputation and keeps us more competitive.

"We're able to know what our true costs are on our jobs, so it allows us to be as competitive as we can on our quoting. When our sales rep can go out and quickly get the contract, process it in our system, and get the thing going — again it makes us more competitive in the market. Our turn-around time is much better," he says.

SECURADYNE SYSTEMS

Dallas-based Securadyne Systems was founded in 2011 with the plan of building a best-in-class nationwide security systems integrator. The company has 300 employees working from 19 offices across the U.S.

In mid-2013, Securadyne made a significant investment in an enterprise-level ERP platform from SAP. ERP, or enterprise resource planning, is business process management software that allows an organization to use integrated applications to manage the business and automate many back-office functions.

"The solution was designed so that it supported our business from 'quote-to-cash,'" describes Taylor Carr, the company's senior vice president of business development.

All functional areas of Securadyne's business utilize the platform to conduct their core business transactions. These functions include CRM, estimating, procurement, inventory management, human capital resource management and planning, accounting/finance, and core operational activities, such as project management, service and maintenance, Carr describes.

"We started with an all-in-one cloud solution from SAP. However, in mid-2014, we decided to invest further into our solution by interfacing SAP with WeSuite's WeOpportunity and WeEstimate applications. We wanted to further increase our employees' productivity and did so by moving to applications specifically developed and honed for our industry. As of April 2015, we have a fully automated 'smart interface' between the systems, where both master and transactional-level data flows between all systems," Carr describes.

The company's "quote-to-cash" solution is utilized by every functional area of the business, making the advantages "endless," Carr says.

"Our system users have the ability to access real-time data across multiple work streams. A few examples include: a salesperson has the ability to view open service tickets for a customer or if the customer has any past due invoices; our procurement team can consolidate vendor orders across multiple branches and leverage better volume discounts; our project managers are able to access CRM and estimate data to help them better understand project specifics and customer requirements.

"The efficiencies gained by deploying the WeSuite/SAP solution are countless and we are reaping those benefits daily," Carr says. "There are very few integrators that are truly standardized across their business. ERP is one of the many tools we use to insure this level of standardization internally and it ultimately improves our customer interactions and their experiences."

ABC BURGLAR ALARM SYSTEMS

Bowie, Md.-based ABC Burglar Alarm Systems is a family-owned and operated full-service detection company established in 1952, employing 20 people.

The company implemented Cornerstone Billing Solutions' cloud service more than eight years ago after ABC had an unexpected system crash that owner Dave Webber describes as being "very tiresome to recover from. After we recovered, we began looking for a way to do our billing without having to worry about losing any of our data or having to manage our network billing files and data ourselves," Webber says.

This was accomplished by selecting Cornerstone as its sole vendor for customer management soft-

> Currently, 37% of the 29 million U.S. small businesses are adapted to the cloud, but an **anticipated 78%** will be fully cloud operational by 2020.
>
> *Source: Intuit Inc.*

ware and billing processes.

"Cornerstone Billing Solutions helps manage our cash flow by automating our recurring billing as well as producing our service and installation invoices. We also automate tracking of our receivables and manage slow-paying customers using their billing plus module. It seemed like they were the only company who had software that included a service and installation module and not just invoicing for the recurring monitoring fees.

Webber's experience was that most of the central stations were not offering this feature at the time and the ones that offered it were very expensive and didn't provide a way to invoice service calls or installations, he claims. "We decided we didn't want to mix our monitoring database with our billing database (have a monitoring company also do our billing) and Cornerstone offered a good solution to our problem by providing a service that would bill our customers as well as deposit our receipts into our bank account, saving us time and money," he says.

Some of the reasons ABC selected Cornerstone's solution were that "they really understood the importance of our invoices going out on time every month. The invoices consistently had a professional look with space on the back of the invoice to advertise any specials or info we wanted to get out for that month," Webber says. "They helped us to correct many problems we had with our existing database and made sure every account was correctly entered and accurate. They allowed us to create and invoice some of our larger accounts and VIP customers ourselves through the system without additional fees. They provided a pay portal for our customers to go online and pay their bill, and much more."

Webber says ABC Burglar Alarm has become more efficient in all areas and the company's receivables have been reduced by 50 percent or more compared with what they were before using the Cornerstone solution.

"This software will help in many areas; for example, sales — estimates; service — generate invoices at the job site; inventory — track your equipment; pricing — input all equipment cost to track profit or loss.

"When I'm on a service call I can look at the customer's account with my iPad and see if they are current on their bill, look at zones, past service history and basically all the information I need about the account and when I'm done repairing the system I can generate and email an invoice to that

What Makes for Good Small Business Software?

To better help developers understand how to best approach the small business apps opportunity, Intuit – producer of QuickBooks – commissioned Nielsen, a leading research firm, to examine how small-business owners are currently using software solutions and mobile apps.

When asked what app solutions small business owners want to see created, they cited those that:

67%	Help stay organized by better managing the back office (for example, bookkeeping)
63%	Save time and money by automating work they would otherwise have to do manually
48%	Help maintain good relationships with existing customers
34%	Work seamlessly with other software solutions they are using
21%	Help generate sales leads and win new business
21%	Provide deep insights into their business performance

4 in 5 (81%) of small business owners say it is important that the different software solutions they use work seamlessly together.

SOURCE: "The Appification of Small Business," Intuit Developer, April 2015
www.slideshare.net/IntuitDeveloper/ebook-the-appification-of-small-business

account, saving time and administrative cost." ∎