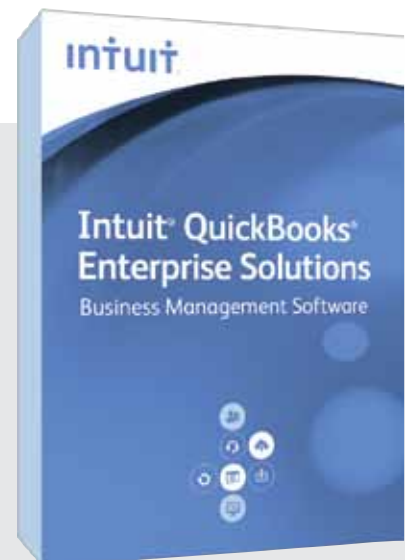




# Clear Skies for Environmental Consulting Firm with Enterprise Solutions

“Enterprise Solutions for Professional Services is a great solution. We’ve been able to customize it so that it does exactly what we need it to do.”

Chris Nelson  
Accounting Manager  
Woodward Environmental



**Location:** Seattle, WA

**Employees:** 35

**Enterprise Solution Benefits:**

- Dramatically reduced time spent editing monthly invoices/reports for clients
- Reduced manual entry work with integrated timesheet application
- Received business intelligence with Professional Services-specific reports

# Windward Environmental

Windward Environmental is an environmental consulting firm that provides professional services to meet their clients' needs in water quality matters.

Most of the employees are scientists who specialize in various aspects of environmental pollution and remediation. They are all salaried and perform much of the work from their Seattle offices and client field sites.

**A better way to track time.** To manage their financials, the company used to rely on QuickBooks Premier. They moved up to QuickBooks Enterprise Solutions in 2006.

In particular, the firm was looking for better timesheet management when they made the switch.

"We essentially sell time," says Chris Nelson, Accounting Manager for Windward Environmental. "And because every project is slightly different, that time has to be billed at different rates."

Chris creates projects within Enterprise Solutions that represent the projects the company takes on for their clients. He creates tasks under each project to capture the different project components.

"Each project has its own rate structure. That way, when employees record their hours to a project, the correct rate is automatically applied to those hours," he says.

**Integrated time tracking from anywhere.** Employees log their time using BigTime, a timesheet application available from the Intuit marketplace.<sup>1</sup>

“BigTime is a web-based application, so employees can log their hours from any location as long as they have an Internet connection,” he says. “BigTime is convenient because it pulls directly from Enterprise Solutions, making important data, such as client or employee information, available in the time tracking application.”

**Saving time with convenient features.** Once a week, Chris pushes data from BigTime to Enterprise Solutions to update the company financials with the employees’ hours worked on individual projects. He creates all the invoices for the prior month’s activity at the end of every month.

“I don’t have to enter any hours worked, because it’s already all in there from BigTime,” he says. “Invoices show clients which employee worked on what project, how many hours they worked, and at what rate.”

Job costs are also billed to customers monthly.

“An office employee, Heidi Enders, takes care of the accounts payables. She enters bills and company credit card receipts into Enterprise Solutions as billable costs. These then appear on the customer invoice.”

Windward Environmental works with an outside accountant who helps with year-end tax filing. To help smooth communications with the accountant, the firm added numbers to their account names.

“I’ve added account numbers to many accounts in our Chart of Accounts,” he says. “That’s eliminated the errors that used to happen occasionally with our accountant, when there was a misunderstanding about which account we were working on.”



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**Extensive reporting for complex projects.** Windward Environmental sends their customers highly detailed reports, which include hours, the different rates applied to those hours, and notes the environmental scientists have made about their work on the project.

Before sending clients their monthly reports and invoices, Chris reviews the information with the project manager. Sometimes hours were entered under the incorrect task or don't include the correct information. If the project manager has any changes that need to be made, Chris can easily make them.


“Making these edits at the end of the month used to be much more time-consuming, because I had to update both the timesheet and the Enterprise Solutions file,” he says. “Now I can correct that information in Enterprise Solutions once, and synchronize all the relevant data with a push of a button. It's saved me a huge amount of time every month.”

Chris also saves time with reports he can create in Enterprise Solutions.

“Project Managers often want to see how many hours have been charged to a project for a particular time frame to make sure they are within budget. I generate a ‘Time by Job Detail’ report to get that information,” he says.

When Chris is taking care of his monthly invoicing tasks, he frequently looks at reports from the prior month.

“The ‘Billed/Unbilled Hours by Person’ report is really useful. I can see right away if there is any time that still needs to be invoiced,” he says. “I also check the



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‘Unbilled Expenses by Project’ report to see what is outstanding on our billable non-labor costs,” he says.

Chris keeps track of amounts owed to subcontractors using the same report.

“We pay our subcontractors only after we’ve been paid by our clients for their work,” he says. “When I receive a payment from a client, one of the first things I check is the ‘Billed/Unbilled Hours by Person’ report to see which subcontractors need to be paid.”

**Customized to fit their needs.** For Windward Environmental, Enterprise Solutions has provided a software system that provides just the right level of sophistication for their business, without overburdening the firm with complex processes and capabilities.

“Enterprise Solutions for Professional Services is a great solution,” he says. “We’ve been able to customize it so that it does exactly what we need it to do.”



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<sup>1</sup> Intuit Marketplace applications sold separately at additional cost.