Evaporative Solutions

One License of Business Central Helps Small Business Beat the Limitations of QuickBooks

Customer:
Evaporative Solutions

Industry:
HVAC Equipment Sales

Organization Size:
2 employees

Headquarters:
Denver, CO

Former System:
QuickBooks Online

New Solution:
Microsoft Dynamics 365 Business Central

Highlights:

- Complex customer data managed effectively to improve shipping efficiency

- Multiple-spreadsheet business processes streamlined with a single solution

- Business owner empowered to take ownership of implementation and customization.

About Evaporative Solutions

Air conditioning units work hard to cool down the buildings we live and work in – often at a high energy cost. Evaporative Solutions is a premier distributor of equipment that helps those AC units work more efficiently. With rising energy costs and a push to reduce carbon footprints, Evaporative Solutions has seen rapid growth. However, with just 2 employees, they're not your typical distributor – they drop-ship all their equipment directly from the manufacturers to their clients.

The Challenge

As business increased, they needed more advanced functionality. Reesha Curtis, Operations Manager for Evaporative Solutions, recalls, *"I needed to better manage our customer data and products and break things down by project for better analysis."* She adds, *"I also wanted to customize views, dashboards, and the look of customer-facing documents, and none of that functionality was available in QuickBooks."*

The Solution

Reesha's search for a better solution led her to Kristen at Mount Evans Consulting. She showed Reesha the power and ease of use of Microsoft Dynamics 365 Business Central. Right away, Reesha knew she had found the software she had been looking for. What were some of the deciding factors?

Business Central is Affordable. Of course, Business Central isn't a low-cost, entry-level accounting solution. Yet, it isn't out of the reach of small business budgets. Reesha comments, *"The price difference between QuickBooks Desktop and Business Central isn't a deal-breaker. In fact, Business Central is right in range."*

Business Central is Robust. Since it is a full-featured ERP solution, Business Central had everything on Reesha's wish list – and much more. Admittedly, there was a learning curve. It took time to learn the system and configure it to her liking, but Reesha found it well worth the effort.

Business Central Allows Independence. One of Mount Evans Consulting's principal goals is to help their clients become self-sufficient. That approach appealed to Reesha, who wanted to get her hands dirty and configure her Business Central instance on her own. She says, *"Kristen and I would meet online, and she would walk me through whatever challenge I faced. She taught me all the basics and pointed me toward deeper tutorials. Her blog was an invaluable resource."*

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Reesha Curtis, Operations Manager
Evaporative Solutions

"In Business Central, I have customized my dashboards to show me what I need to know at a glance. That may sound like nothing, but for me it is huge. The ability to customize every screen is one of the reasons why Business Central is great, even for just one user."

Reesha Curtis, Operations Manager
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The Benefits

So, how has Business Central made life easier for Evaporative Solutions?

Easily Manages Complex Customer Data. Business Central helps Reesha ensure that their products ship to the correct location every time. She comments, *"We have one customer with around 30 locations, and each may have 2 or 3 shipping addresses. The fact that I can store and easily access all of that in Business Central is priceless."*

Customizable Views Display Relevant Metrics. Each business has unique processes and requirements that define what data is most relevant to users. *"In QuickBooks, I had to scroll past everything that wasn't important to me to get to the information that mattered most. In Business Central, I have customized my dashboards to show me what I need to know at a glance,"* Reesha noted. She adds, *"That may sound like nothing, but for me it is huge. The ability to customize every screen is one of the reasons why Business Central is great, even for just one user."*

Streamlined Operations. Managing customer and vendor interactions has become much easier for Reesha. She relates, *"As soon as I log on, all of my sales orders and purchase orders to send to customers and vendors are front and center. If one of my customers has an overdue balance, it will be flagged, which is very important. At this point, I could not live without my dashboard."*

Advanced Product and Inventory Configuration. In the HVAC industry, it is common for the inventory data of a product to be different when working with vendors as opposed to a distributor's clients. This can be difficult, if not impossible, to manage in QuickBooks – but not so with Business Central. Reesha explains, *"I can define an item once with part numbers and descriptions specific to my vendors and clients. Business Central will then 'translate' the product language for vendors on purchase orders, and for clients on sales orders, automatically. Having centralized product data is priceless for me."*

"I appreciate that MEC wants me to be self-sufficient. That allows me to have control over my business, rather than constantly running to a consultant."

Reesha Curtis, Operations Manager
Evaporative Solutions

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Reesha Curtis, Operations Manager
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Single Source of Business Truth. In the past, managing the sales and delivery cycle was a tedious task. Reesha explains, *"Before, our operations were scattered over several spreadsheets and separate systems. Now I have everything in one place – Business Central."* She adds, *"Because it's so customizable, I have streamlined our process from the initial call until final delivery. This laid the groundwork for our rapid growth. I just can't imagine having done it without Business Central. It's integral to who we are and how we work now."*

Why Mount Evans Consulting?

The unique implementation approach of Mount Evans Consulting helped this small business get started quickly and reach its goals.

Promotes Self Sufficiency. Being dependent on a consultant can be expensive and leave a small business owner feeling vulnerable. Reesha explains, *"I appreciate that MEC wants me to be self-sufficient. That allows me to have control over my business, rather than constantly running to a consultant to say, 'Can you do this?' or, 'Can you fix this?'"*

Easy to Work With. Your Business Central partner must be knowledgeable and attentive to your needs. What was Reesha's experience? She says, *"I would absolutely recommend Mount Evans Consulting. Not only are Kristen and her team kind, fun, engaging, and easy to talk to, but they really know their stuff."*

Committed to Even the Smallest Business. Many people think Business Central is too big for one user, but Reesha feels differently. *"We only need one user license, and I'm thrilled with Business Central. What you'll get out of it depends on what you're willing to put in. If you invest the time to learn how the different parts of the system work, you'll value all that it has to offer. Once you get going with Business Central, you won't be able to live without it!"*

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