



# WENNISOFT® CASE STUDY

## YES Equipment & Services, Inc.

“WennSoft provides us the ability to calculate our fixed assets more effectively. What we used to accomplish in two days we can now do in two hours.”

Tracey Clark, President of Yes Equipment & Services, Inc.

### Overview

**Country:** United States  
**Industry:** Material Handling

**Locations**  
Headquarters is in  
Menomonee Falls, Wisconsin

**Scenario**

- Running an outdated Unix-based system
- Difficult accessing information
- Systems weren't integrated

**Solution**  
The company moved from an internally built system to WennSoft Service Management Series, Equipment Management Series and Microsoft Dynamics® GP complete business solutions

**Benefits**

- Better access to data
- Customer information available more quickly
- Improved inventory management
- Excellent tracking of costs
- Offered additional technological services to customers

**Business Impact**

- Time necessary to compile and track equipment costs reduced from 2 days to 2 hours
- Time necessary to reconciling depreciation went from 6 hours to 20 minutes
- Customers see internet invoicing information immediately, where there used to be a one-day lag

### About Yale Equipment & Services

Yale Equipment & Services, Inc. (YES) is a premier supplier of material handling and construction equipment that sells, rents and services the equipment they represent. YES offers high-quality, American-made products backed by an international company, one of the largest in the industry. By manufacturing and servicing what it sells, YES and its distributors provide a chain of original parts and custom service. They have approximately 5,000 pieces of equipment and employ approximately 60 technicians.

### Upgrading Systems

Prior to purchasing WennSoft, YES was using a Unix-based legacy system that was archaic. It was difficult to get information out, their systems weren't integrated, and didn't have the ability to communicate with one another.

YES was in search of a new software solution that would tie together their equipment data and customer data with their business financials. They wanted a solution that would help manage their equipment fleet and service calls so they would maximize profitability. They were looking for a system that they could tailor to their specific needs; they wanted a solution that would give them the ability to go beyond what the systems principals are and allow them to do other things.

“At YES Equipment & Services, we demand a system that we can make our own,” said Darrin Sullivan, CFO/VP for YES Equipment & Services.

They selected WennSoft Service Management Series and Equipment Management Series. Service Management Series improves organizations' field service by capturing service calls, dispatching assignments, tracking resolutions and managing contracts. Equipment Management Series maximizes the utilization, life and cost of an organization's equipment and assets by managing all related information including purchasing, selling, rental and maintenance.

They chose WennSoft because it offers a strong product in every area that YES deals with: parts, service, rental and equipment. They had a tremendous amount of confidence in the abilities of WennSoft and Microsoft to stand behind them and push them forward in the right direction. They also liked the tight integration into Microsoft technology, which has a strong reputation for managing financial data.

### Internet Invoicing

WennSoft makes it easier for YES to offer Internet invoicing to its customers. Prior to using WennSoft, they had to run a batch at the beginning of each day and then import the data into the Internet invoicing system. This delayed the customer's ability to view the invoice. With WennSoft, information automatically goes to the Internet invoicing system, and the portal is updated in real-time versus having to wait until the end of the day when they import the batch.



### About WennSoft

WennSoft, a Microsoft Gold Certified Partner, provides innovative business management solutions for public and private sector organizations focused on project management, field service and equipment/fleet management.

WennSoft services include assessment, training, implementation and go-live support. With more than a decade of experience in delivering superior applications in the field service and construction industries, WennSoft is the solution provider of choice.

"This gets information to our customers more quickly," said Tracey Clark, President of Yes Equipment & Services. "Before, our customers had to wait a full day before they could view the information in their invoices. Now they can see it as soon as the information is posted."

In addition to Internet invoicing, WennSoft has helped YES offer services to its customers such as maintenance history, consignment inventories and fleet management. Because WennSoft enables them to perform tasks more efficiently, offering these technological services hasn't added to YES's administrative overhead.

"These services require minimal maintenance, so the long-term gains far outweigh the short-term investment," said Sullivan.

### Access to Data

WennSoft gives YES exceptional access to their data. They can go to one page and easily view a variety of essential information including profit & loss statements, scheduled maintenance history, service history, and purchasing data, to name a few.

"The WennSoft solution gives us the ability to track all costs involved for each piece of equipment. By having access to the transaction details, as well as the usage and service history, WennSoft provides us the ability to calculate our fixed assets more effectively. What we used to accomplish in two days we can now do in two hours," said Clark.

WennSoft also helped YES automate the way that they reconcile depreciation.

"In a month of closing, we probably saved 40 to 50 staff hours," said Sullivan. "Reconciling depreciation went from a 6-hour process to about 20 minutes."

### Fixed Assets

With their previous system, they had difficulty managing fixed assets. Because the fixed-asset module in their old solution didn't work, they had to purchase a second solution specifically designed for managing fixed assets. The problem was that the two systems didn't communicate, which caused them unnecessary overhead because they had to reenter data between the two systems.

"WennSoft's Fixed Asset module communicates with the rest of the system, which saves us time," said Clark. "It also gives us the ability to run web reports that our accountants can log into and review at any time."

### Inventory Management

WennSoft helps YES manage its inventory. It helps them develop a good projection of what parts are going to be consumed based on scheduled maintenance. This helps YES maintain a proper balance in their inventory.

"WennSoft helps ensure that we have enough parts in stock so we don't get caught short, yet not so much that we're carrying a lot of inventory that will unnecessarily tie up cash," said Clark.

### A Bright Future

"We have high expectations of everything that we invest money into, and WennSoft met our expectations," said Sullivan. "WennSoft is an integral part of our operations. The thing that makes me happy about WennSoft and Microsoft Dynamics GP is the opportunity for the future and where we're going to go."

To learn more about how WennSoft Solutions can have a similar impact on your organization, please contact us at 262-821-4100 or [info@wennsoft.com](mailto:info@wennsoft.com).