

# Sage 100 Contractor opens the door to opportunity for J.F. Cook Company

## Service, inventory, and payroll integration increase efficiency



### Customer

J.F. Cook Company, Inc.

### Industry

Construction and field service

### Location

Oak Creek, Wisconsin

### System

Sage 100 Contractor  
Aatrix State & Fed Payroll Reports™

Since 1947, J.F. Cook Company, Inc. (J.F. Cook) has been selling, installing, and servicing quality doors and windows throughout the greater Milwaukee region. The company has divisions serving commercial/residential contractors as well as residential home owners, and it requires a flexible business management solution that can adapt to the way it does business. For J.F. Cook, that solution is Sage 100 Contractor (formerly Sage Master Builder).

### Ready for an integrated construction solution

When Stacey Teal, operations manager for J.F. Cook, joined the organization, the accounting and operations tasks were not integrated and many tasks performed manually. “We were using Sage 100 Contractor to handle our accounting and project management tasks,” says Teal. “However, our inventory, service management, reporting, and many other tasks were being handled outside of the solution with spreadsheets and other standalone databases.”

### Integrating all aspects of the business

J.F. Cook wanted to integrate its operation by having all of its business data together in a single application. The company turned to its Sage business partner, who recommended the company incorporate the Sage 100 Contractor service management and inventory control capabilities. The partner also introduced J.F. Cook to companion products that deliver integration with the company’s outsourced payroll provider and streamline payroll tax filing tasks. “Now, we are using nearly every aspect of Sage 100 Contractor, and we love it,” says Benjamin Engel, owner and president of J.F. Cook Company.

“When I first started here, almost everything was done manually,” says Rich McRae, commercial and residential service manager. “Sage 100 Contractor has really taken all those steps and combined them into a much more automated, fluid process.”

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Benjamin Engel  
Owner and President  
J.F. Cook Company, Inc.

### Challenge

J.F. Cook Company was using the job costing and accounting functionality of Sage 100 Contractor for years, but other areas of the organization were not benefiting from automation and integrated operations.

### Solution

Sage 100 Contractor as well as companion products provide the company with visibility across the organization and deliver detailed job costing information.

### Results

Accounting staff size reduced due to higher efficiency. More accurate service contract management improves customer service. Accurate job cost data helps ensure profitability. Integration with payroll service provider and tax filing service reduces burden on staff and ensures compliance.

“With the efficiencies we have gained, we were able to eliminate two full-time positions and reduce two others to part time. The labor savings significantly improves our bottom line.”

Benjamin Engel  
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#### Service enhancement

The Service Receivables module delivers the tools and functionality that J.F. Cook’s busy service division needs to better satisfy its customers. “Before our service operation was managed with paper, spreadsheets, and the knowledge in peoples’ heads,” says Steve Getzin, vice president and service manager. “Now we have full inventory control, warranty tracking, a graphical dispatch board, tight integration with job costing, and our technicians now have the ability to input data from the field using an iPad.”

Throughout J.F. Cook’s warehouse, staff is able to access the Sage 100 Contractor database to look up part numbers and work orders. “The inventory component of Sage 100 Contractor is robust,” says Getzin. “We have gained much better control and visibility into this valuable corporate resource.”

#### Streamlining payroll tasks

J.F. Cook outsources its corporate payroll tasks to PayChex, a payroll service provider. The company uses Slimmer Software PayDayLynx, a third-party connected solution, to export its payroll data from Sage 100 Contractor to the service provider for final processing. “It has proven to be a very efficient solution for us,” says Teal. “We maintain the control of our payroll data here, and have the peace of mind and convenience that comes from having the professionals do the final calculations.”

J.F. Cook takes advantage of Aatrix’s State & Fed Payroll Reports™ a payroll tax filing solution that is integrated with Sage 100 Contractor. “It supports all the payroll and HR forms we need to generate and file, such as new hires, unemployment, and withholding,” says Teal. “We fill out the forms in Sage 100 Contractor and then we can print and file them, or file them electronically. One benefit of this is that the forms are stored electronically with the employee record in the software so we can review them as needed.”

#### Enhanced customer service

The Sage 100 Contractor solution is making a difference for J.F. Cook by helping to improve the company’s customer service. Questions and issues surrounding service billings have been greatly reduced. “We have many types of contracts with different billing arrangements. Before we did not have an efficient way to track the contract details, so billing errors sometimes occurred,” explains Teal. “Using Sage 100 Contractor, we track all the contract information, and billing is faster and more accurate.”

#### Significant return on investment

Engel notes that the return on investment of the company’s use of Sage 100 Contractor is significant. “We used to have an accounting staff of six full-time employees. With the efficiencies we gained, we were able to eliminate two full-time positions and reduce two others to part time. The labor savings significantly improves our bottom line.”

#### About Sage Construction and Real Estate Solutions

With more than 40 years of industry experience, Sage keeps projects moving with the most job-ready and people-connected solutions for construction and real estate. Its 40,000 customers use Sage to manage more than 400,000 jobs, 5.7 million subcontracts, and 622,000 rental units each year. To learn how Sage can help your organization, visit [www.sagecre.com](http://www.sagecre.com), call 1-800-628-6583 or contact a Sage Business Partner.

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