



Microsoft Dynamics Customer Solution Case Study



Energy-Efficiency Firm Powers Up Business With Business Management Software

Overview

Country or Region: United States

Industry: Professional services:
environmental engineering

Customer Profile

Launched in 2001 to address deregulated energy markets, Current Energy now targets both residential and commercial customers with comprehensive energy-efficiency products and services.

Business Situation

With business expanding in volume, diversity, and geographic scope, Current Energy needed a financial system to integrate with line-of-business systems and handle enterprise accounting tasks.

Solution

Current Energy and Microsoft® Gold Certified Partner Inscio implemented Microsoft Dynamics™ GP business management software and integrated the solution with retail and field-service management systems.

Benefits

- Faster and more accurate accounting
- Increased visibility into business performance
- Seamless customer experiences
- Easy-to-use software tools

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Lee Horton, IT Director, Current Energy

Current Energy provides energy-efficiency consulting, services, and products to residential and commercial customers in the Dallas-Fort Worth area of Texas. Expanding rapidly into new lines of business and geographic regions, Current Energy found that QuickBooks accounting software limited the company’s potential. Current Energy wanted to combine robust intercompany accounting functions, its point-of-sale and field-service management solutions, and top-notch business intelligence and reporting capabilities. Working with Microsoft® Gold Certified Partner Inscio, Current Energy implemented Microsoft Dynamics™ GP business management software and integrated it with Microsoft Dynamics Retail Management System and other business systems to improve cross-selling and customer care, provide better visibility into all levels of the organization, and reduce monthly closing times.



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Situation

Founded in 2001 and headquartered in Dallas, Texas, Current Energy pioneers new strategies and services that help both residential and commercial customers reduce their energy costs. The company’s multiple business units include energy brokerage, facilities management, field service, manufacturing, and the world’s first energy-efficiency retail store. The breadth of offerings at Current Energy—from energy-efficient light bulbs to energy-management services—provides a comprehensive approach to reducing energy consumption and expense.

Much of the growth at Current Energy has come recently through acquisition and the pioneering of new ventures, and the company plans to expand operations nationwide. This rapid growth, into both new lines of business and geographic areas, was hampered by the company’s previous accounting software, QuickBooks.

“Running a growing, multifaceted organization in QuickBooks became unmanageable. Each time we added a line-of-business, we had to create a new instance in QuickBooks. It made recording intercompany transactions and bank reconciliation extremely difficult,” recalls Lee Horton, IT Director at Current Energy.

As business expanded, Current Energy spent an increasing amount of effort reconciling discrepancies in its accounts, managing cash flow requirements, and reporting accurate financial information to the private investors who own the company. “Because QuickBooks is not a transactional financial system, we relied on paper processes to track transactions and changes. And with seven people in our accounting department, plus a Director of Finance, it became very difficult to maintain transactional integrity and track how we arrived at a certain point in our

balance,” explains Horton. In addition, limited accounting functionality meant that the business management team did not have the up-to-date information or flexible reporting it needed to support confident decisions.

Current Energy also needed tighter integration between its lines of business to facilitate increased cross-selling. Because the company has such a broad range of products and services, customers can get confused without a seamless product learning and purchasing experience. “As a business goal, we’re trying to foster cross-selling and sharing of customer opportunities between our different lines of business. The inability to record intercompany transactions and purchases in QuickBooks made that highly impractical,” says Horton.

Solution

Current Energy understood that its growing needs required an enterprise accounting or enterprise resource planning (ERP) system, so the company evaluated several software packages, including SAP and Oracle. In the end, Current Energy chose Microsoft Dynamics™ GP business management software because of the ease of implementation and integration with Microsoft Dynamics Retail Management System (RMS), which Current Energy uses in its retail locations.

“The time-to-benefit for Microsoft Dynamics GP was probably the most important factor in our choosing that solution over others. We were looking at a one- to two-year implementation with SAP or Oracle, while Microsoft Dynamics GP could be up and running in just a few months,” says Horton.

Current Energy worked with Microsoft® Gold Certified Partner Inscio to implement Microsoft Dynamics GP. The ability to handle intercompany transactions combined with reporting capabilities makes it easier to

Figure 1. The customer-facing kiosk provides a seamless shopping experience.



manage accounts at Current Energy. For example, the company can more easily track fixed-asset depreciation for equipment in the field and credit revenue from related contracts against the upfront labor and equipment costs.

Inscio also deployed Microsoft Dynamics Client for Microsoft Office, which extends financial and ERP data beyond the accounting department, enabling the entire staff to access accounting data and functionality from within the familiar programs in the Microsoft Office system. The entire staff benefits from features that make their jobs easier, such as the ability to manipulate ERP data in Microsoft Office Excel® and organize and display data from the accounting system.

Microsoft Dynamics Client for Microsoft Office also enables a seamless customer

experience by pulling data from various business systems—including Microsoft Dynamics GP, Microsoft Dynamics RMS, and Current Energy's field service solution—into Microsoft Office SharePoint® Server 2007. Inscio developed a prototype kiosk interface, shown in Figure 1, that takes advantage of this integration so that customers visiting the store can easily configure and purchase products and services from different business units.

Microsoft Dynamics GP also provides Current Energy with functions beyond accounting, such as the potential ability to track just-in-time inventory, bills of materials, and delivery schedules for the company's manufacturing operations.

Using Web services, Inscio integrated Microsoft Dynamics GP with Current Energy's field service management solution. This

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ensures customer relationship management and field operations are tied into Microsoft Dynamics GP across business lines, and that customer account activity is automatically included in the rolling chart of accounts and overall profit-and-loss financial reporting.

Current Energy and Inscio set up executive dashboards that aggregate information from Microsoft Dynamics GP and Microsoft FRx®, an automated financial reporting and analysis application for executives and managers. The company also uses Microsoft Forecaster for collaborative, Web-based budgeting and planning. The executive dashboards, which run on Office SharePoint Server 2007, display information relevant to people’s particular roles, as well as key performance indicators, daily views of financial positions, and access to reports.

Benefits

With Microsoft Dynamics GP, Current Energy has a solid foundation on which to grow its operations. Microsoft Dynamics GP provides the enterprise accounting functions that Current Energy needs to manage multiple lines of business, enable seamless customer experiences, and gain real-time insight into business performance.

Faster and More Accurate Accounting

By automating accounting functions, Microsoft Dynamics GP helps Current Energy eliminate paper processes and shorten the time it takes to close monthly accounts. “In the first month after implementing Microsoft Dynamics GP, we were able to close our monthly financials in just two days. On QuickBooks, that process took us two weeks,” says Horton. “Now we’re able to communicate more quickly with investors and better manage our cash flow requirements, both inbound and outbound.”

Current Energy now has the accounting tools it needs to keep track of its diverse and

growing business. “One of the strengths of Microsoft Dynamics GP is that it allows us to maintain separate ledgers for each of our business units,” says Horton. Microsoft Dynamics GP also ensures transactional integrity so that every transaction and change has an audit trail, helping the accounting department answer questions and maintain accountability to investors.

Increased Visibility into Business Performance

Since deploying Microsoft Dynamics GP, Current Energy has realized the benefits of making financial and ERP information available more broadly across the organization. The ability to expose data from Microsoft Dynamics GP and Microsoft FRx within Office SharePoint Server 2007 provides a flexible way to share reports and analyses. Access to dashboards and other reports is especially valuable to business management, who can now easily check real-time financial status and other important business performance metrics. Equipped with more detailed and up-to-date information, Current Energy managers can more confidently make important business decisions.

Seamless Customer Experiences

With built-in integration between Microsoft Dynamics GP and Microsoft Dynamics RMS, Current Energy can provide the type of seamless customer experiences needed to simplify an otherwise complex offering mix. The flexible infrastructure also helps Current Energy maintain continuity over online, retail, and in-the-field sales.

“Our number one goal for customer service is to give the customer what we call a ‘concierge experience’ so that they have a straightforward product and service selection and purchasing process. Microsoft Dynamics GP and Microsoft Dynamics RMS work

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For more information about Current Energy products and services, call (469) 533-6100 or visit the Web site at: www.currentenergy.com

For more information about Inscio products and services, call (972) 764-3434 or visit the Web site at: www.inscio.com

together to help us provide this experience,” says Horton.

Easy-to-Use Software Tools

Not only was Microsoft Dynamics GP faster to implement than competing enterprise accounting solutions, Current Energy employees quickly learned how to use the system.

As Current Energy continues to grow nationally, the simplicity of Microsoft Dynamics GP and integration with the Microsoft Office system, including Office SharePoint Server 2007, facilitate adoption and uptake of the tools across the organization and reduce the time and expense of training employees to use the tools.

“Microsoft Dynamics GP works with Microsoft Office Excel and Office Word so that our people can work in the application they are most comfortable with,” says Horton. “People in our accounting department started taking advantage of that capability from day one. They simply took that data synchronization and interactivity for granted—the software works just the way it ought to.”

Microsoft Dynamics

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what’s most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented. By automating and streamlining financial, customer relationship, and supply chain processes, Microsoft Dynamics brings together people, processes, and technologies, increasing the productivity and effectiveness of your business, and helping you drive business success.

For more information about Microsoft Dynamics, go to: www.microsoft.com/dynamics

Software and Services

- Microsoft Dynamics
 - Microsoft Dynamics GP 10.0
 - Microsoft Dynamics Retail Management System 3.0
- Microsoft Forecaster
- Microsoft FRx
- Microsoft Office
 - Microsoft Office Excel
 - Microsoft Office SharePoint Server 2007
 - Microsoft Office Word

Technologies

- Microsoft Dynamics Client for Microsoft Office
- Web services

Partners

- Inscio

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