Special Software Fixes Dallas Plan-and-Spec Company's 'Bugs'

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Bartos Industries had a problem. Despite being in a highly-technical and specialized field such as the plan-and-spec-ifications HVACR market, the Dallas-based company spent too much time on pencil-and-paper work for its projects and bids.

"We were still going to the hard-copy file for everything," said Lance Malone, chief financial officer at Bartos.

In addition, none of the hodge-podge of software that the company did use for spreadsheets, databases, and billing was really designed for their plan-and-spec business. And even worse, they had trouble finding

Lance Malone

people who understood the old software well enough to fix any technical bugs.

"We were just outgrowing the off-the-shelf stuff that you could get at Best Buy," said Spencer Shaw, president of Bartos.

Malone said it's a common industry problem.

"The plan-and-spec side of this business is very unique in terms of the work flow and how you order product and you ship product and how you compensate the people who get the order," he said.

TIME FOR CHANGE

By the mid-2000s, it had reached a point where Bartos was looking at having software designed especially for it — an option they were reluctant to exercise.

"It was going to be extremely expensive to do that," Malone said.

Fortunately for Bartos officials, they had recently met with employees of A&E Specialties Inc. at the AHR Expo. The Atlanta-based company, a manufacturer's representative with a plan-and-spec business itself, had recently developed TurboRep.

TurboRep is sales management software specially designed to meet the needs of HVACR manufacturer's representative and plan-and-spec companies.

"The basic premise of the program is a job tracking and accounting package all rolled into one," said Eric Bache of TurboRep.

According to the company's website, www.turborep.com, the software allows firms to monitor and track sales, inventory and payroll, as well as create invoices and other documents all in one place. It takes the place of separate programs for each function, which as Malone pointed out, is common within the industry.

"It's already based in what a manufacturer's rep does, and we tweaked it a little bit here and there because we all do business differently across the nation in some way or fashion," Bache said.

GENESIS

The idea for TurboRep came from problems that A&E was having with its own, 1990s-vintage software system.

At the time, the company had a developer create a program for the company's manufacturer's representative business. And it worked well — for a while.

"We did fine," Bache said, until A&E found itself caught by the Y2K glitch.

Also known as the Year 2000 problem, the so-called Y2K bug was a computer programming glitch caused by the then-common practice of storing time-sensitive data using only the last two digits of a year. The move was done to save memory space, a scarce resource at the time when computers started entering the workplace. The problem was many programs would interpret the year 2000 as 1900, potentially causing systems to crash.

The situation was not well known until the mid-1990s, when programmers scrambled to fix it before Jan. 1, 2000.

A&E realized the software they were using was among those affected by Y2K.

"It really did get to a point where we didn't know what to do after the year 2000," Bache said.

To further complicate the situation, the company it had hired to design its program had gone out of business.

"We were scrambling to find something that would work," he said.

TURBOREP TO THE RESCUE

Eventually, the company located one of the developers of its 1990s-era system who helped squash their Y2K bugs and create TurboRep.

Within the few years, after talking to other plan-and-spec companies, they realized their tailored software was unique and decided to market it to similar businesses, including Bartos.

"We were their second customer," Malone recalled. Today, Bartos is one of A&E's largest clients.

"It was just a lot better system than we were used to," Shaw said. "It was a lot more cost effective."

Malone agreed. While not an inexpensive product, the investment was well worth the expense.

"It was very low cost for us," he said. "It had a return on investment of under a year."

The time savings were quickly evident, Malone said. A typical plan-and-spec project has numerous bid revisions and other modifications during its life. That can be difficult to track using only pencil and paper, and it's still not easy with many software programs supposedly designed for such tasks.

CHANGES

"Sometimes on larger projects, the plans get changed many times before the job actually commences," Malone said. "You'll find a lot of systems out there that are good at job costing, but they don't have the bid tracking and submittal processes."

But with TurboRep, all such activities are easily viewable on screen and followed using color-coded tabs and other menus.

"Everything is visible from the time we find out about the opportunity until the job is complete," Malone said. "You don't have someone going back and trying to find a paper file and locate … the original bid (or) what were the changes in revisions one, two, three."

Need to figure out when the requirements for the type of HVAC system or ventilation were changed?

"It's all maintained in the system," Malone said. "There's a history of every quote that we did along the way, all the contractors that we sent the quote to. It's all right there. There's no longer a need for a paper file to see what's going on with the project."

And if clients have questions, the answers are easily found with a project's history "at our fingertips."

Malone said it took Bartos workers about three months to learn how to use the program efficiently. Since then, they've been able to customize it for their operations.

"We've made many, many enhancements to it over the years," he said.

A&E Specialties is currently developing the next generation of the TurboRep software, incorporating some of the suggestions made by Bartos officials.

After having used the existing version of TurboRep for several years, Malone said his company is still very happy with the product.

"It allowed us to grow significantly without adding administrative-type people," he said.