Unanet | A/E
Powered by Clearview

FORECON Streamlines Operations and Gains Vital Insight with Unanet A/E

Challenges

When your business is outside, managing private forests, woodlots, and large-scale investment-grade timberlands over 100,000 acres, the last thing you want to do is sit at a desk completing administrative tasks like timekeeping and project management. Yet as a professional service business, time and material tracking were critical to FORECON.

Bare-bones systems minimized admin tasks: For almost 50 years, FORECON relied on three-ring binders to keep track of employee time, then transitioned to the basic software database management tool they'd been using for 15 years: Client Manager.

Sunset systems: The sustainability of FORECON'S business solution of Quickbooks and Client Manager quickly came into question when they learned Client Manager would no longer be supported.

The need for a modern solution: FORECON knew they needed a timekeeping, accounting and project management tool that would bring their company into a more modern business era.

President John Gifford and Director of Appraisal Services Chuck Alexander set out to evaluate many different tools over several years, and in the end selected Unanet A/E, powered by Clearview.

FORECON

About FORECON, Inc.

Headquartered in Falconer, New York, FORECON is a regional forestry and natural resources consulting firm to landowners of all sizes, including Real Estate Investment Trusts (REITs), Timberland Management Organizations (TIMOs), and governments, schools, churches, environmental organizations, industrial sawmills, banks, families and individuals.

FORECON spent more than two years evaluating possible ERP tools to replace its outdated Client Manager, QuickBooks and spreadsheet systems, and selected Unanet A/E due to the individualized attention from the Unanet team, the customization inherent in the software, and real-time insights that the software delivers.

> *"The team at Unanet took the time to learn our systems and demonstrate the value their software could bring to our specific business."*
>
> **Chuck Alexander,
> Director of Appraisal Services,
> FORECON, Inc.**

Unanet

Implementation Tailored for FORECON

After selecting Unanet A/E, the FORECON team and the dedicated Unanet service team developed an implementation plan, tailored for their success.

Transferring Historic Data

One pressing challenge was to **transfer 15 years of time and expenses data** representing **nearly 15,000 projects** from their old software to their new ERP system. FORECON and Unanet were able to bring the data over and **create customized scripts** for how that data should be sorted, separated and tracked in Unanet A/E.
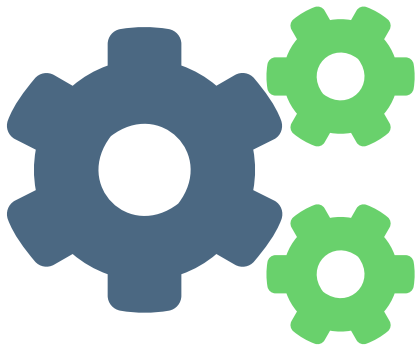
Improved Timekeeping and Expenses Processes

Once Alexander and the dedicated Unanet A/E team had migrated over the historic data, the next step was setting up customized processes for FORECON's timekeeping, expenses, finance and accounting going forward, and helping **increase adoption** of the new software across its **40+ employees** in **five different offices**.

Despite some initial reluctance, it soon became clear among the staff how valuable Unanet A/E was in **delivering new capabilities and simplifying manual processes.**

100% Visibility into Invoicing and Accounting

With Unanet A/E, FORECON suddenly had new capabilities that provided a wealth of new **analyses, knowledge and insight** into the company's operations including new detail and real-time updates about project status, weekly time entries, and accounting.

"Now, we can see exactly what's been billed and paid, and even more importantly, where work has been done and hasn't yet been invoiced."

**John Gifford,
President,
FORECON, Inc.**

Delivering Next-Level Business Insight

With the ERP system in place, Alexander and Gifford could focus on the new functionality that Unanet A/E brought to the company. They set up new ways to **recognize revenue** per office and per project type, developed **income statements** that detailed gross margins and operating income, and created new custom reports that showed **vital business information** per office and project type.

Streamlining Complex Invoices

Complex, **multi-part invoices** – in some cases more than **30 project line-items** – needed to be generated, managed and tracked in accordance with many of its institutional clients' needs. In the past, this complexity had been managed manually by their in-house accounting staff using a combination of QuickBooks and spreadsheets.

> "*Unanet A/E tied everything together for us in a way that's incredibly useful to helping us manage our business more strategically,*" said Gifford. "*This is an amazing piece of software that has given us the ability to understand each and every part of our business in ways we never had before.*"

**John Gifford,
President,
FORECON, Inc.**

Where Information Means Insight

UnanetUnanet is a leading provider of project-based ERP and CRM solutions purpose-built for Government Contractors, AEC, and Professional Services. More than 3,100 project-driven organizations depend on Unanet to turn their information into actionable insights, drive better decision-making, and accelerate business growth. All backed by a people-centered team invested in the success of your projects, people, and financials.

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