DataSelf
BI for mid-sized companies

CORE ASSOCIATES

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CEO and Co-Founder
Core Associates

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CSO
Core Associates

Core Associates, LLC Makes the Successful Leap from Excel to DataSelf

Software development company now makes proactive, real-time decisions with reporting from BI tool

In a fast-growing technology company with expanding product lines, there comes the time when an organization must move beyond Excel spreadsheets to a cloud-based BI system to access the data it needs quickly and efficiently. This was the case for Core Associates, LLC. In 2017 the company realized that its growth was being constrained by the reporting tools it was using.

At the time and with rapid growth and expansion into new products, Core Associates saw that as its information needs became increasingly complex, Core needed to expand the reporting capabilities of its multiple systems. "I hadn't had much experience with BI tools at the time, but I knew that there was something out there that could do a much better job for us," said Frank Grenci, CEO and Co-Founder of Core Associates.

ERP Partner Connects the Dots

"Core Associates is a valued Alliance Partner and Sage 300 Customer for Net at Work. When they approached us for a comprehensive BI tool that would work with Sage 300, we suggested DataSelf to help them run their business," said Kelly Hummel, Director of Sage 300 Team at NetAtWork. "Their adoption of Data Self has let them spend more time managing their business rather than having their business run them. They now have laser focused reports at their fingertips and continue to build out the system today to provide dashboarding and reporting for the executive management team and their departments based on each areas individual needs."

As Core began researching BI options, the need for middleware became quickly apparent. "We needed a tool that would seamlessly integrate Sage 300 CRE and Sage CRM, and a company that would help us hit the ground running," said Carol Cook, Director of Strategic Projects and IT at Core Associates. "When we spoke with Joni Girardi and the DataSelf team, we were impressed by their knowledge of the products we were using as well as Tableau, which made our selection fairly straightforward. What I also liked about DataSelf is that often with software procurement, you first meet the A Team but after purchasing, get the B or C Team. We have gotten the A team from Day One."

Products Closely Woven with Sage 300 CRE and Sage CRM

Jupiter, FL-based Core Associates is a software company with three main product lines that serve the construction and real estate industries by creating time and cost efficiencies for businesses with multiple sites and that manage simultaneous projects/jobs with field workers:

- TimberScan® – Developed for seamless integration with Sage 300 CRE and automates the accounts payable process including data entry, approvals, and reporting to facilitate invoice approval. TimberScan also includes a mobile app, TimberScan Go, at no additional charge.

- AcumatiScan – Is the AP automation software for Acumatica users, designed especially for the Acumatica Construction Edition, that helps companies better manage AP documents, invoice approval routing, and more.

- Core Cloud Systems (CCS) – A forms-based cloud application that works with TimberScan to streamline credit card reconciliation and expense reports, enable mobile purchasing and receiving, manage change orders, and facilitate mobile time entry by work crews.

This impressive portfolio led to CFO Tech Outlook magazine naming Core Associates as a "Top 10 Accounting Solutions Provider" of 2020.

Life with Excel Was Challenging

Before implementing DataSelf, most of Core Associates' data was stored on individuals' spreadsheets. Because reporting from their ERP system took so long to gather manually — sometimes weeks—by the time final results were distributed to management for decision making, the data was extremely outdated. "When we used spreadsheets, people would ask 'Where did this number come from?'" said Cook. "If the reports took three weeks to compile and distribute, the numbers we used in the report were at least five weeks old. Then we were back to square one."

When DataSelf was first being implemented, Cook explains how hard it was to overcome deeply ingrained habits and initiate cultural change. "Even though Excel was extremely painful, it was still the devil that our employees knew," she said. "For DataSelf to be successful, we had to get buy-in from everyone and slowly wean them off of Excel." Currently, 95% of Core

Associates team members have adopted DataSelf as their reporting option of choice and "people are excited about the data they're getting and how quickly they can get it."

The KPI's that used to take weeks to compile can now be accessed in a real-time manner, giving Core Associates' management team immediate visibility and tracking. "Before DataSelf, our reporting system was becoming increasingly complex for our Accounting team to pay the correct commissions to our partners and sales team," said Grenci. "For different products, we have different rates and for different partners, we have different rates. When all of this was managed in Excel, it was a nightmare. But now that DataSelf does the heavy lifting for us, we can produce accurate financial statements by product in no time and embed critical business rules to pay the correct commissions in a timely manner that benefits our partners and sales organization."

Refining Customer Relationships and ROI

Having fast, accurate data that can be sliced and diced in infinite ways has not only helped Core Associates achieve real-time visibility into its financials, but also retain customers. "With numerous Excel spreadsheets it took weeks to get the data we needed on customer sales and software usage. By the time we noticed a downward trend for a customer, sometimes a month or more had gone by. We recognized that we needed the tools to be proactive, not reactive." said Cook. "Now, once we notice any trends using DataSelf, we can respond immediately and reach out to our clients to address issues as they arise."

Core Associates is now implementing integrated dashboards throughout the organization. "We currently have some dashboards but want to have them customized for each department, plus have overall company views so all our managers are tracking the right KPI's together," said Grenci.

During the decision-making process, Core Associates co-founder Grenci pitched the benefits of a cloud-based BI solution to his partner Bernard Ross, Core's CSO. "Given that this was an expensive investment, he was initially hesitant," he said, "but a couple of months after the implementation, the ROI became very clear and we both wished we had implemented DataSelf sooner."