

## Telution, Inc.

### Solution Overview

#### Industry

Software and services

#### Scenario

In the past, the company used stand-alone systems for accounting as well as time and billing, which meant that re-entry of data was frequently required and reports were often outdated.

#### Company Profile

Telution is a software company focused on developing and delivering operations-support applications to power providers of communication and entertainment services over a variety of networks. The company's flagship product, COMX™, is a pre-integrated suite of customer management, order management, trouble management, and billing applications.

#### Software Used

Microsoft Dynamics SL  
Financial Series  
Project Series  
Business Portal  
Microsoft SQL Server

#### Benefit

Integrated financial and project management information has accelerated Telution's sales process and positioned them for future growth. Automated processes and access to reports on the web is providing more accurate, timely information.



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***Automating time and billing saved 40 hours per month for Telution. The company recently moved to Microsoft Dynamics SL to take advantage of comprehensive project management capabilities that are seamlessly integrated with a full-featured accounting system. Dynamics SL has significantly reduced the amount of administrative effort required to run the business. The result is that the company can increase its sales while maintaining its administrative staff and expenses at constant levels***

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Like many software companies, Telution has numerous different types of sales, and the revenue from each must be recognized at different times in order to comply with generally accepted accounting practices. In the past, Telution used a Windows-based accounting system and separate time and billing software that didn't communicate with each other. All of the professional services information had to be manually transferred to the accounting system and decisions about when to recognize revenue had to be made on a project by project basis. "It took a lot of time to transfer the information because professional services invoices had to be prepared manually, which was very tedious," said Addie Sheahin, Telution's Controller.

### Tracking Project Performance

Sheahin made the decision to look for new software that would integrate both financial accounting and project management. "We looked at all the major mid-market packages and Dynamics SL was the one with the strongest built-in project management capabilities," she said. Dynamics SL Project Controller provides a flexible platform to establish a project and task structure with up to twelve levels of information that can be readily defined by project managers. These segments provide a top-to-bottom view of project performance from a multi-project view down to a snapshot of individual activities within a given project. Sheahin also liked the fact that Dynamics SL allows anyone in the company to enter time or expenses over the Web using Dynamics SL Desktop without having to learn or gain access to the core accounting functionality. Dynamics SL Desktop provides Internet-based access anytime and anywhere to 100% of the capabilities of Dynamics SL. This Web interface can also be used to deliver customized reports to managers so that they can easily track how much time has been billed to their jobs.

### Automated Processes Save Time

A Microsoft Partner provided implementation and training support. "They helped us establish our account codes and create a few special reports, Sheahin said. They configured the system to not just meet our current requirements, but also to position us for future growth." One of the most important aspects of the implementation process was configuring Dynamics SL Project Controller to handle each type of sale automatically. "Our biggest challenge from an accounting standpoint has always been to manage all of our different types of sales and ensure that revenue was recognized at the proper time," said Sheahin. Rather than writing code, the partner simply set parameters to adapt the module to the desired flow for each type of sale. The ability of

*“We have dramatically reduced the amount of time required to perform a wide range of administrative tasks. The result is that we can grow without having to make proportional increases in our back-office staff.”*

Addie Sheahin  
Controller  
Telution

these new processes to eliminate the previous manual task of moving information from time and billing into the accounting system provides major time savings.

Dynamics SL was able to handle all of Telution’s basic needs right out of the box and very little customization was required to manage all of their different types of sales.

Sales of software are entered into a Dynamics SL Project Management module called Flexible Billings. Support and maintenance contracts are also created in Flexible Billings, and revenue is recognized in a manner dictated during setup over the life of the contract. Invoices for annual maintenance are coded to a deferred revenue account, and a billing and revenue schedule are set up at the time the contract is entered. Then, invoices are automatically created and general journal entries are automatically recorded to recognize revenue at the appropriate times. Professional services contracts go through Dynamics SL Project Controller, and hours and expenses are allocated to the project as employees enter their time.

At the end of the month, the accounting staff runs Project Allocator and sends a report via email to the project manager who checks it to be sure it is accurate. Once the project manager approves, an accountant checks off a box to send the time and expenses into Dynamics SL Flexible Billings and allocate the revenue. Invoice line items are automatically created via a billing transaction load allowing them to be selected on draft invoices. Accountants review these drafts in an approval screen and then check a box that allows them to be printed as invoices. These processes have eliminated time lags to transfer information between systems and information is more current for managers to review.

### **Web-enabled Business Portal Creates Efficiencies**

Additional time savings are created by the fact that consultants can now enter their expenses directly over the Web and they are automatically routed to their supervisors for approval. In the past, consultants filled out paper expense sheets and accounting clerks had to enter every flight, hotel bill and meal into the computer. Telution saves at least one day per month by automating this process, and an additional two or three days are saved with Dynamics SL’s customized financial statements. Previously financial reports were manually produced in spreadsheets and information wasn’t current until the end of the month when all systems were updated and synchronized.

“Automating the link between project management and accounting saves a huge amount of time,” Sheahin said. “When we had to generate invoices for all of our professional services and support and maintenance contracts by hand, it used to take 5 to 7 days per month. Now, project managers can review the time as it is entered over the Web so mistakes are usually detected long before the end of the month. Nearly all of the invoices are now generated automatically so our job has been reduced to checking the numbers and making any adjustments that are required. The result is that it now takes only about 2 or 3 days to get the entire process done.”

#### **For More Information**

For more information about Microsoft Dynamics SL, call **Synergy Business Solutions** at 800-481-8590 or go to [www.synergybusiness.com](http://www.synergybusiness.com).