CrossPoint Engineering Cuts Data Entry and Invoicing Time by 80% with Tenrox Timesheet

CrossPoint Engineering needed time and expense data capture methods to help the speed and accuracy of the client billing process.

Market background

Founded in 1993, CrossPoint Engineering is a fullservice process and control house specializing in Process Automation Engineering, Process Control system design, as well as start-up and calibration for industrial and pharmaceutical processes. With offices in Boston and New York City, CrossPoint Engineering's client base includes pharmaceutical and biotechnology companies, as well as specialty chemical companies.

Challenge

CrossPoint Engineering undertakes a multitude of projects each year. The company, which has upward of 40 customers at any given time, was entering time and expense data into Excel spreadsheets. Data from these spreadsheets was then centrally transferred into the company's QuickBooks system. "With somewhere in the vicinity of 100 projects undertaken per year, our antiquated and unstructured system of data capture was extremely time consuming and highly prone to errors," said Gary Woods, President of CrossPoint Engineering.

The difficulties and limitations of CrossPoint Engineering's time and expense data capture methods were in turn impacting the efficiency, speed and accuracy of the client billing process. In addition, producing project and operational reports was an equally tedious, highly inaccurate and timeconsuming process. "We had no real means of producing reports, so this function was handled in a rather inconsistent manner," adds Mr. Woods.

"Tenrox helped us to simplify the retrieval of timesheets and expense accounts data and made every manager a true stakeholder in his or her project."

— **Gary Woods, CrossPoint Engineering President**

CROSSPOINT ENGINEERING

INDUSTRY: Engineering Consultancy

LOCATION: Westwood, MA

WEBSITE: crosspointengineering.com

At a Glance

Challenges

- Manual spreadsheets
- Unstructured system of data capture
- Reporting highly tedious

Benefits

- Data entry and billing time reduced by 80%
- Fully detailed reporting on all project activity
- Automated resource management makes the process of assigning consultants and hourly rates more reliable
- Significant reduction of data entry errors which translates into a substantially shortened billing cycle
- Streamlined tracking, management and approval of invoices
- Better visibility & control over projects

Tenrox by upland

The Tenrox by Upland Solution

In 2004, CrossPoint Engineering began an exhaustive process of evaluating approximately twelve solutions to streamline the Company's time capture and billing processes. CrossPoint experimented with two other solutions before selecting Tenrox Timesheet. As an integrated workflow-based time, expense, billing and invoicing system, Tenrox Timesheet centralizes and automates the tracking of billing rates, billable work, project status and ongoing cost/revenue updates, enabling companies to create and approve invoices quickly, leading to a reduced billing cycle and improved cash flow.

CrossPoint Engineering began the Tenrox Timesheet implementation in the Fall of 2004. By January 2005, the system was fully operational and integrated with CrossPoint Engineering's ACCPAC software and Microsoft Project.

Benefits

"Immediately following the implementation of the Tenrox solution, we were able to reduce our data entry and billing time by 80%," said Mr. Woods. In addition, the Tenrox solution has provided CrossPoint Engineering with a fully detailed audit of and reporting on all project activity. User data is being validated at the point of entry based on preconfigured policies and procedures, significantly reducing data entry errors which has translated into a substantially shortened billing cycle. "Tenrox helped us to simplify the retrieval of timesheets and expense accounts data and made every manager a true stakeholder in his or her project." In addition, with standardized project time and expense management processes in place across the enterprise, CrossPoint Engineering has streamlined its tracking, management and approval of invoices, and gained better visibility and control over its projects.

Woods adds that, "The technical knowledge of the online services and support staff is excellent and they've been very responsive to our needs."

About Tenrox

Upland's Tenrox is a cloud-based professional services automation software application that automates project initiation, resource management, time and expense, and reporting and analytics to improve the management of billable projects from pipeline to close. Tenrox offers configurable cost and billing rules, including chargeback or invoicing, with certified integrations to all major CRM and accounting systems.

About Upland

Upland Software provides Cloud Solutions across the enterprise enabling amazing customer outcomes in:

+ PROJECT & IT MANAGEMENT
+ WORKFLOW AUTOMATION
+ DIGITAL ENGAGEMENT

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