CUSTOMER SUCCESS INTERVIEW

ALEGIS CONSTRUCTION

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SOME BACKSTORY

When Dan Finnegan decided to help launch Alegis Construction in 2010, people thought he was crazy. "'*Why would you commute to Oregon to start a construction company in the middle of a recession?!' They weren't wrong...*" Dan reflects fondly on the early days at Alegis. "*Maybe we were a bit crazy.*"

In those days, Alegis was just a new blip on the map... too small and too new to get a corporate credit card. "*The company card was an Alaskan Airlines card in my name.*" And their expense reporting was a bit of an arts-and-crafts project. "*I remember printing the credit card statement each week and using scissors to cut it into strips of expenses associated with each team member. I'd scan the expenses into one sheet per team member, and then ask my colleagues to code their expenses and submit their receipts.*"

"I knew that we needed Vista's cloud-based, modern project management and payroll modules."

And while that was just 10 short years ago, if you looked at their portfolio today, you'd be hard-pressed to believe that they ever had such humble beginnings. Alegis specializes in commercial projects under $10m, and they've grown to become a widely respected name along the West Coast.

Prior to working at Alegis, Dan worked at a large, respected GC. He knew there was a better way, because he'd done substantial research on ERP solutions. "*As far as I could tell, Viewpoint Vista, although expensive, was the best option.*"

THE EARLY SOLUTIONS

It took Dan a couple years to convince his partners to give him the money to invest in Viewpoint, but he kept at it. *"I knew that we needed Vista's cloud-based, modern project management and payroll modules."*

When Alegis finally pulled the trigger on Viewpoint Vista, they decided to run the old ERP and Vista concurrently until all of the old projects had completed. *"I was running projects on 2 ERPs for nearly all of 2012. That experience nearly killed me."*

Once Vista was in place, Dan immediately got to work on automating the expense reporting process. *"We actually bounced between Comdata and WEX before we found SAP Concur. WEX and Concur Expense have paired beautifully for us."*

"After a cancelled implementation of a new application, I was ready for another solution."

Although both Comdata and WEX promised a working interface, it never materialized for Alegis, and that left Dan with an incredibly manual expense reporting process. *"We'd start by downloading a file. We would then manually parse the file by users and email unique spreadsheets to each employee with their weekly transactions. They would then code those transactions and send it back to our finance team. The employee would also print a hard copy and staple their receipts to it. The hard copy was manually validated by a finance team member at each of our branch offices or job sites, and then mailed in to the home office for filing."*

AN EXPENSIVE LESSON

After trying for months to save time through this process, Dan ultimately decided that they were better off parting ways with Comdata. *"Ultimately, the manual processes are what killed the relationship between us and Comdata. After a cancelled implementation of a new application, I was ready for another solution."*

And that's about the time that Dan heard about Ryvit's integration between Concur Expense and Viewpoint Vista. For Alegis, Concur Expense was going to be expensive. Their pricing structure is based on the number of expense reports submitted per month, and since Alegis intentionally processes credit cards weekly, the transaction volume was going to be a bit pricier than they were initially prepared for, but... *"Getting the costs associated with our projects as quickly as possible and making sure that we don't lose receipts was valuable to us."*

Accurate receipt tracking and timely project cost management were disciplines that Dan needed Alegis to adhere to without compromise. He had experienced an audit with the Washington State Department of Revenue at his previous company, and that encounter taught him a $6,000 lesson**...**

"In Washington, you're pretty much guaranteed an audit by the state Department of Revenue at least once every 5 years. Sales tax audits are brutal. If they ask for a copy of a receipt, and you can't provide it, then they assume that you never paid the sales tax on it. Their assessment is the sales tax, plus interest and penalties.

I remember the instance from my prior company very distinctly. There was a $1,000 receipt for toner that the auditor had requested. I couldn't find it. The fee from the Washington Department of Revenue was going to be $6,000 to cover the tax, the interest, and the penalty. At that point, I vowed to never lose a receipt again."

IT JUST WORKS

After working with WEX and Comdata, Dan couldn't shake that feeling of a looming audit. *"The manual process simply exposed us to too much of an audit risk."*

Dan was able to explain to Ryvit and SAP Concur that he wanted a simple solution that mimicked the existing business process and would be easy for his employees to adopt and use with minimal impact to their daily operations. Simple, right? *"Tammy [Channel Executive at Ryvit] will attest that I was a bit of a pain when it came to building the integration, but Ryvit was able to come up with exactly what I needed for Alegis. I was definitely concerned with user rejection, but that never happened. It was widely adopted and widely used straight off the bat."*

"It's faster, more accurate, and more reliable. If I were to ever leave Alegis... not that I plan to... but if I did... the Ryvit/Concur Expense integration for Vista would come with me. I'll take it where ever I go."

Instead of a tedious process with manual tasks that involved digital and hard copies, each employee has their own Concur Expense account. WEX transactions are downloaded into Concur Expense on Monday night, and between Tuesday and Friday, Aleigs employees login to Concur Expense, code their expenses, and attach their receipts. *"Not only has the validation in Concur Expense eliminated accounting errors and missing receipts, but we also realized that our project finances were sharper and our expense processing time was significantly reduced."*

In fact, after polling his team about their expense reporting process, Dan realized that they're saving about 8 hours per week (or nearly 420 hours per year) with the integration between Concur Expense and Viewpoint Vista.

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