

Pressure Vessel Engineering improves productivity and project visibility with Unanet ERP AE

Meet Pressure Vessel Engineering (PVENG), a Canada-based engineering consulting company specializing in pressurized equipment design. Serving clients across various sectors, PVENG found themselves grappling with hurdles in data integration and project management. That's until they discovered Unanet ERP AE - the key that unlocked a new world of efficiency and data accuracy to deliver better business outcomes for the firm.

The Challenges

Before Unanet, PVENG struggled with several formidable business challenges including:

- **Hindered data flow:** Integrating data between QuickBooks and their project management system presented challenges. According to PVENG President Steve Munn, "Trying to get different plug-ins to push and pull data between programs wasn't working. We wanted something where everything was contained in one place."
- **Less than ideal project tracking:** They sought a more effective framework for following project progress and managing changes in scope.
- **Cumbersome manual processes:** A lack of automation caused data discrepancies and slowed operations.

Despite these challenges, PVENG was determined to find a solution. Enter Unanet ERP AE, the platform that promised to help them make business easy.

“The information is all in Unanet now, and so you can get it out and use it to look forward and figure out what you want to do. That's one of the benefits of having everything in one place.”

Steve Munn
President
PVENG



Situated in Canada, Pressure Vessel Engineering (PVENG) is an engineering consulting firm. They boast a diverse clientele from various industries, all of whom rely on the firm's mastery in pressurized equipment design and registration.

www.pveng.com

The Solution

Unanet emerged as PVENG's solution for integrating project management and accounting data – a true project accounting solution. PVENG chose Unanet ERP AE for its comprehensive capabilities, user-friendly interface, and its ability to streamline workflows efficiently. Key features included:

- **Configurable tables and dashboard:** Out-of-the-box visualizations and configurable process mapping enabled superior data management and efficiency.
- **Flexibility:** The ability to create custom fields and applet tabs provided a significant boost in accuracy and efficiency. PVENG was able to create new functionality in Unanet AE that generated PDF quotes it could send to customers directly when requested.
- **Integrated visibility into financials and project management:** With all of its data tied together in one end-to-end system, PVENG now has greater visibility into more of its business areas, allowing for trustworthy financial insights and project tracking.

The Approach

To implement Unanet ERP AE, PVENG took the following steps:

- **Seamless integration:** PVENG was able to integrate Unanet neatly into their existing tech stack and achieved accelerated time-to-value by closely collaborating with Unanet's customer support teams.
- **Employee training:** PVENG organized dedicated training sessions, ensuring employees use Unanet efficiently for time & expense, project management and accounting.
- **Configurable tables and dashboards:** To enhance data management, PVENG introduced Unanet's flexible tables and dashboards to its workflow.

According to Munn, this helped the organization become more efficient. **“Unanet's tables and dashboards have been a huge time saver for us,”** said Munn. **“It allows quick updates and better data management. Plus, it gives us the flexibility to manage our firm the way we do business.”**

The Impact

Implementing Unanet ERP AE led to major positive changes for PVENG, directly addressing their core obstacles, including:

- **Improved data accuracy:** The system now tracks and manages projects with greatly enhanced data accuracy and efficiency.
- **Time savings:** Generating quotes on change orders and updating projects now takes significantly less time.
- **Increased employee engagement:** Employees are noticeably more engaged and actively using the new system.
- **Enhanced visibility:** Users gain clearer insights into project performance and financial metrics, enabling more informed decisions with reliable analytic information. “We set up a financial dashboard,” said Munn, “that every single person can access. They can see our income statement information so they know how the company is doing financially. They can also access information on utilization and performance, with different access levels depending on whether you’re a manager or individual contributor.”

Reflecting on the journey, Munn said, “We like the system. It gives us the flexibility to run things the way we do business – and more efficiently than ever before.”

After facing daunting business challenges and complex processes, PVENG not only streamlined their workflows, but they also improved the way it approached both project and financial management. Unanet ERP AE helped them take an integrated approach to establishing better visibility across their business.



Unanet is a leading provider of project-based ERP and CRM solutions purpose-built for government contractors, architecture, engineering, construction, and professional services. More than 4,000 project-driven organizations depend on Unanet to turn their information into actionable insights, drive better decision-making, maintain regulatory compliance, and accelerate business growth. All backed by a people-centered team invested in the success of your projects, people, and financials. For more information, visit Unanet.com.