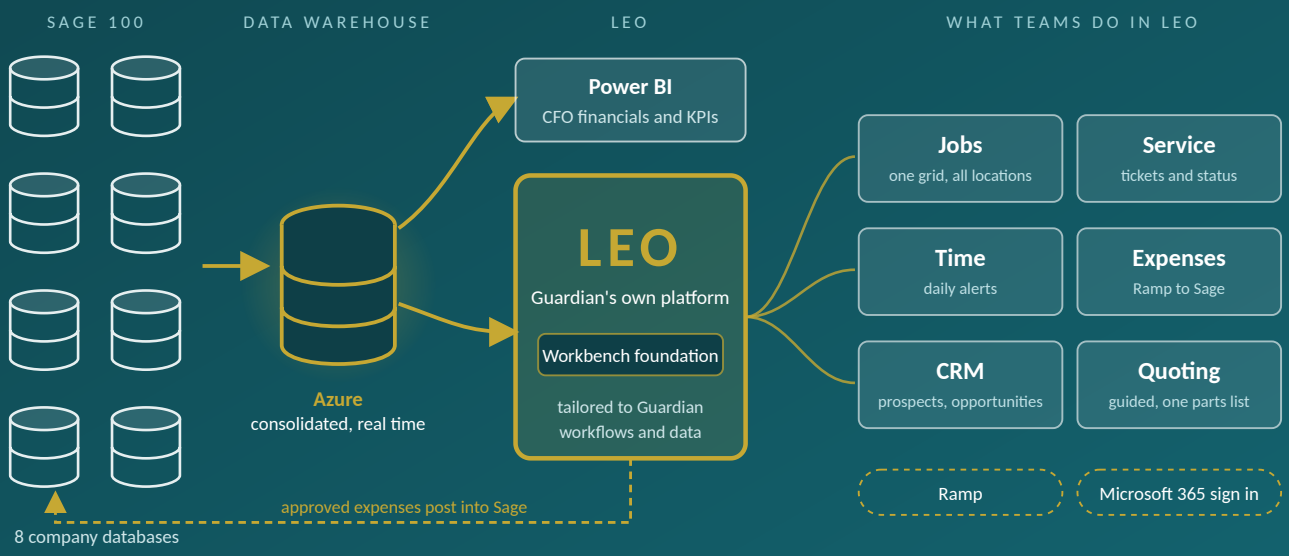
A TWINENGINES CASE STUDY

From Eight Databases to One View: How Guardian Access Solutions Sees Its Whole Business

A private equity owned contractor kept acquiring companies. Leadership needed to see them all as one.



8
locations, one view

6,000
parts, one master list

Real time
reporting across the company

ABSTRACT

Guardian Access Solutions installs and services gates, access control and video systems. Growth by acquisition left each region with its own Sage 100 Contractor database, and leadership wanted every location, and every company still to come, working from one view and one way of doing business. TwinEngines began with visibility, consolidating eight databases into a data warehouse, then extended that foundation into LEO, a platform shaped around Guardian's own jobs, service, time, expenses, CRM and quoting. Leadership now sees financials, jobs and service across every location, and every rep quotes from one master parts list.

At a Glance

PROJECT
Bring eight Sage databases into one reporting view and build LEO, the platform where each location does its daily work. The goal: one trustworthy view of the business and one way of working.

INDUSTRY
Construction: specialty contractor for access control, automated gates, commercial overhead doors, parking systems and video surveillance

ERP AND INTEGRATIONS
Sage 100 Contractor (8 company databases). Integrated with Ramp, Microsoft 365, an Azure data warehouse and Power BI.

RESULTS
- One consolidated view of financials, jobs and service across 8 locations
- Reporting standardized across locations that operate differently
- One master parts list of about 6,000 parts behind every quote
- Daily time alerts that keep hours on the right jobs

WORKBENCH CAPABILITIES
Dashboards and reporting, Sales and quoting, Operations, Financial workflow, Custom workflow.

Overview

Guardian Access Solutions designs, installs and services automated gates, access control, video surveillance, commercial overhead doors and parking systems. Customers include apartment and condo communities, commercial properties, hospitals and schools. Guardian is headquartered in Nashville, has offices in Tennessee, Georgia and Florida, and is private equity owned.

1 The Challenge

Growth by acquisition, one database at a time

Guardian grew by acquisition, and every acquired company came with its own systems. Guardian ran Sage 100 Contractor, an ERP built for construction, and gave each region its own company database. There were eight in all, each reporting on its own.



8 Sage databases — Every database combined — One picture of the company

As the company grew, that mattered more. Finance combined data from each database in spreadsheets to see the whole company. Each location had built its own parts list, so one part could carry several part numbers. Quotes came from templates each location had built for itself. Sage held accounts and contacts for won work, and the business wanted a lightweight place to track prospects before they became customers. As teams grew, tying hours to the right jobs called for more automation.

Eight databases, each reporting on its own

Spreadsheets to combine every database

Several part numbers for one part

Quote templates built by each location

No place to track prospects before the ERP

Time entry that called for more automation

Each new acquisition would add another database to combine.

2 What Leadership Needed

One view, one way of working

Leadership needed one trustworthy view of the business across every location, ready when needed. Success also meant keeping Sage as the system of record, giving project managers, service teams, finance and sales one place to work, and creating a way of working each newly acquired company could step into.

1. **One trustworthy view across every location**
2. **Sage stays the system of record**
3. **One place to work for every team**
4. **A way of working each acquisition can step into**

3 How the Work Came Together

One idea, extended into daily work

One idea ran through the work: a growing, acquisitive company needs one way of seeing and running its business. Visibility for the CFO came first. Operations, finance and sales followed, each extending the same idea into daily work, and TwinEngines has continued to add capabilities as new requirements emerged.

Every TwinEngines engagement starts with a Solution Architect. The team worked in weekly, agile iterations.



Dedicated Solution Architect **Weekly, agile iterations**

1. **Eight Sage databases into Azure**
2. **Power BI reports for the CFO**
3. **LEO with Microsoft 365 sign in**
4. **Jobs, service, time**
5. **Ramp expenses to Sage**
6. **CRM and guided quoting**

4 Inside LEO

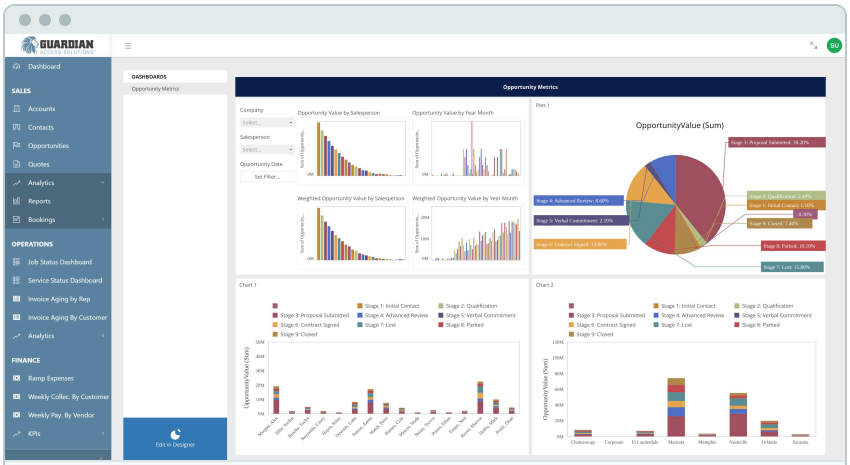
Where each location does its daily work

Jobs and service

Time and expenses

CRM and quoting

Microsoft 365 sign in



Opportunity Metrics: pipeline by stage, salesperson and location

What TwinEngines Built

Each capability extends the same idea

Dashboards and visibility

TwinEngines pulled all eight Sage databases into Guardian's Azure data warehouse and added Power BI reports, giving the CFO consolidated financials and KPIs. Reporting runs in real time. Reports include executive summaries, weekly bookings by location and rep, and a salesperson leaderboard. Every number drills down to its detail.

LEO, Guardian's own platform

LEO is where teams work every day. TwinEngines used Workbench capabilities as the foundation, then tailored LEO around Guardian's own jobs, service, time, expense and quoting workflows, business rules and data. Staff sign in with Microsoft 365, so there is no new password.

Every job in one place

Every install job and service ticket across all locations lives in one place, with all of its associated information, creating one source of truth. The interface is shaped around Guardian's needs. It uses Guardian's own terminology and shows only the information needed for the task at hand. Project managers and executives work from the same editable grid, with percent complete, status and notes, and percent complete follows labor hours rather than materials purchased.

Time accountability

Daily alerts flag anyone missing eight hours the day before, and a weekly check flags short weeks. Managers are notified when shop time crosses a threshold.

Expenses from Ramp to Sage

LEO collects Ramp expenses, lets finance review and update them and mark them ready, then stages them for posting into Sage as vendor invoices. Posting runs through the process Guardian already uses with Sage.

CRM and guided quoting

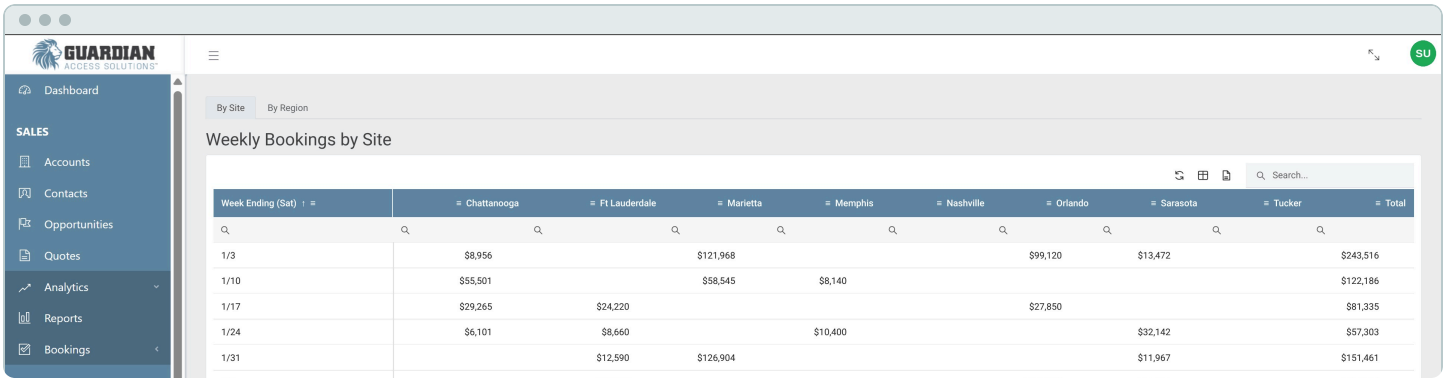
LEO accounts, contacts and opportunities sit on top of Sage data, so reps can track prospects who have not entered the ERP. A quoting wizard walks reps through each system type: access control, AV and IT, gates, intercoms, IP video, overhead doors and parking. It pulls from one master parts list, applies labor automatically and produces a customer ready quote to sign.

HARDEST TECHNICAL PIECE

The quoting experience. Guardian's CEO wanted reps walked through a quote a specific way, and a basic header and line item screen would not do that. TwinEngines built a rule driven wizard that guides reps through the process while allowing them to move forward or return to previous steps as needed.

HARDEST PIECE ON GUARDIAN'S SIDE

Adopting one way of working. It took commitment from every location, including merging every location's parts into one master list of about 6,000 parts.

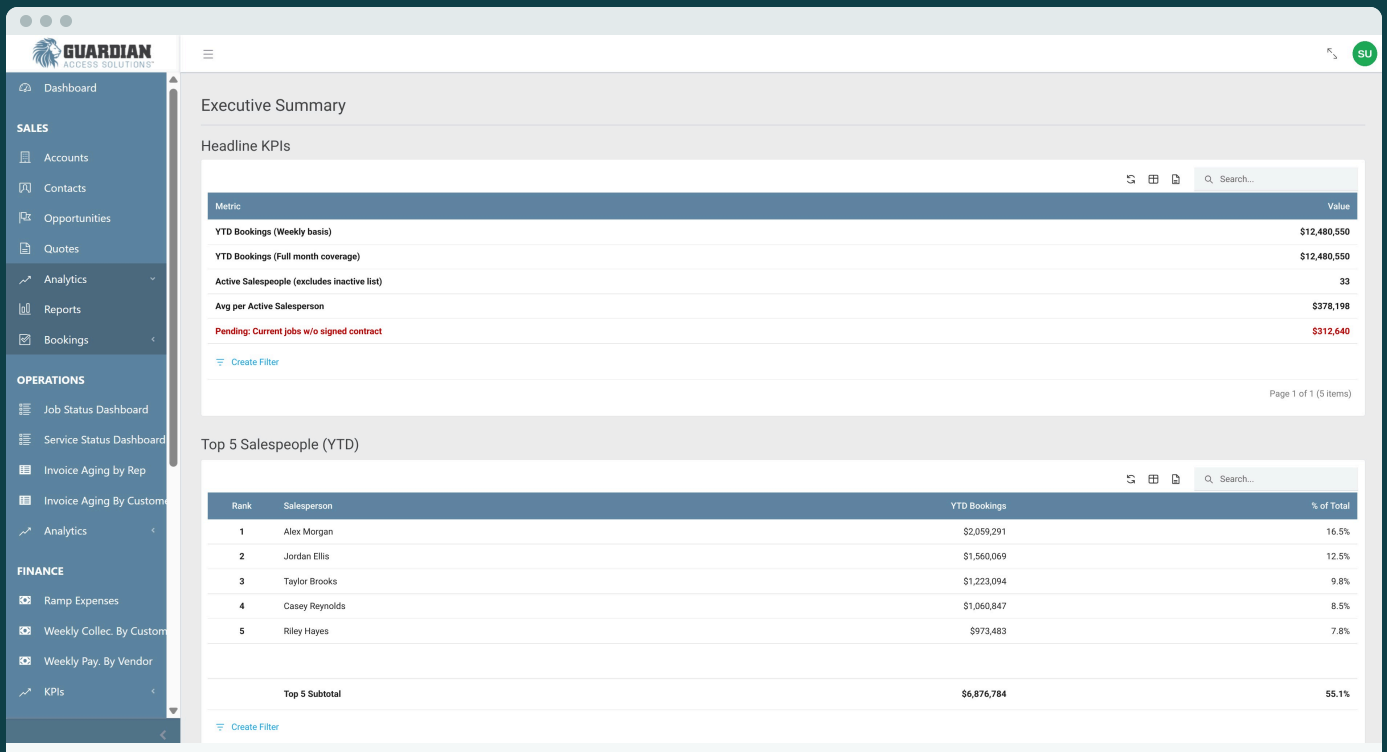


What Leadership Can See

Real screens, sample names and figures

The CFO's view of the company

Financials, jobs and service tickets from all eight databases sit together, so the CFO sees how the company is doing at a glance.



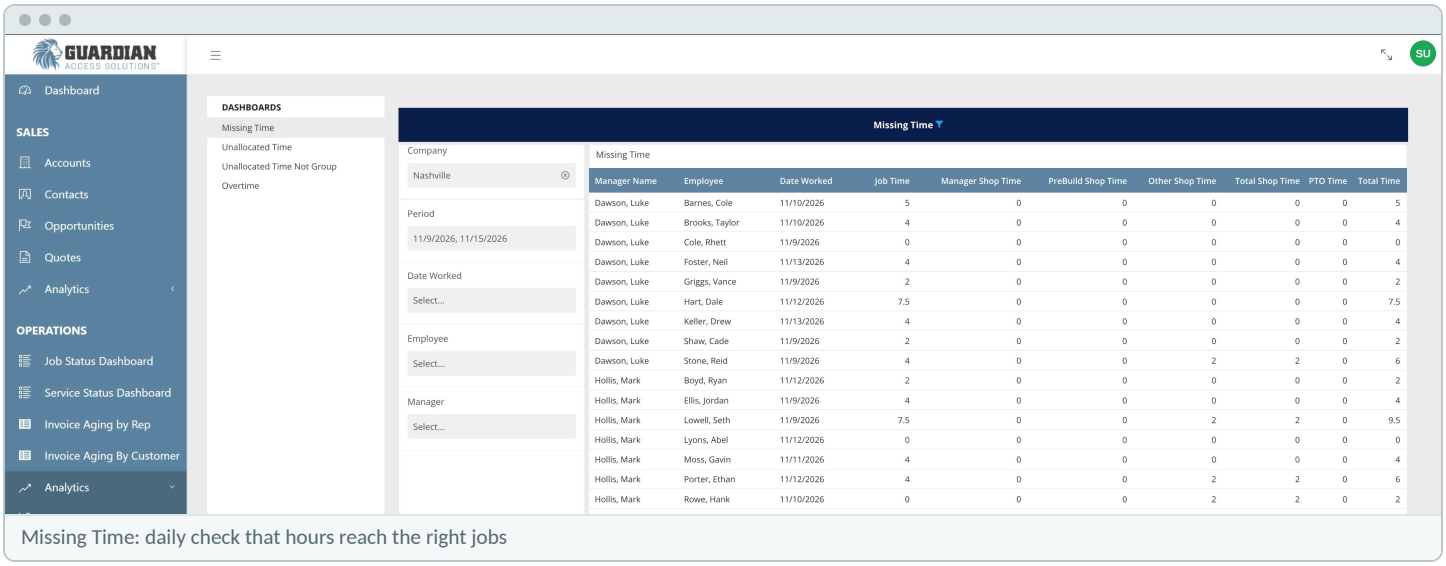
Executive Summary: headline KPIs and salesperson ranking, drill down on every number

Executive summaries
Headline KPIs in one place

Bookings by location and rep
Weekly, every site

Salesperson leaderboard
Ranked, by month

Drill down
From any total to its detail



Missing Time: daily check that hours reach the right jobs

5 What Changed

Leadership can see the business.

8	6,000	Real time
locations, one view	parts, one master list	reporting across the company

Leadership can see the business.

BEFORE		WITH GUARDIAN'S NEW WAY OF WORKING
Eight databases, each reporting on its own	→	**Visibility across every location.** Financials, jobs and service tickets from all eight databases sit together, so the CFO sees how the company is doing at a glance.
Spreadsheets to combine every database	→	**Standardized reporting.** Each location keeps the way it operates, and all report the same way, so numbers compare across the company.
Several part numbers for one part. Quote templates built by each location	→	**One set of parts, rates and quotes.** Every rep quotes from the same parts and labor rates, so a quote reads the same whichever location prepares it. Sales representatives follow one consistent process.
No place to track prospects before the ERP	→	**Sales visibility.** Opportunities are tracked in LEO, and sales leaders see weekly bookings by location and rep.
Time entry that called for more automation	→	**Hours on the right jobs.** Alerts reach managers and staff each day, so time entry stays current.

NEXT
Each new acquisition steps into Sage and LEO

ONGOING
LEO grows as Guardian's requirements evolve

Closing

> Sage did its job. The gap sat between the ERP and the way a company that grows by acquisition actually runs, and TwinEngines closed it without replacing anything. The CFO who loves dashboards has plenty of them. Just as important, the next acquisition has a defined path into Sage and LEO, and TwinEngines continues to add to LEO as Guardian's requirements evolve. Sage and LEO are in place. What comes next is the next company.

Industry Construction, specialty contractor · **ERP** Sage 100 Contractor · **Integrations** CRM, Microsoft 365, Banking (Ramp), Azure data warehouse, Power BI
Workflow Sales, Operations, Field and service, Financial, Custom · **Outcomes** Visibility, Process Standardization, Accuracy, Scalability, Automation