piaX® Property management in the construction industry

Reference report on the use of the proALPHA object management module at Ernst Schweizer AG, Hedingen (CH)

The slogan of Ernst Schweizer AG is: „Building for people and the environment". The Swiss company is a leading metal construction company and offers its customers a wide range of construction related products. The products include facades, windows, doors, mailboxes, parcel boxes, solar systems and more. In doing so, SCHWEIZER attaches great importance to cost-effectiveness and efficient processes to competitiveness and further development of the company. Ernst Schweizer AG employs around 540 people at four production sites.

Short info about the project:

- Customer: Ernst Schweizer AG
- Industry: Metal construction
- Application: Sales
- ERP system: proALPHA 5.2e
- Project data: In use since 01.06.2017
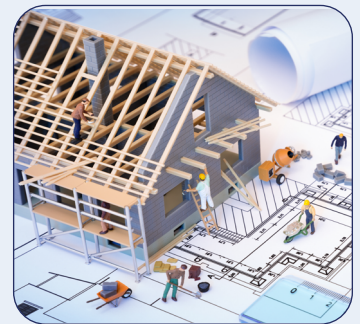
Initial situation & challenge

Ernst Schweizer AG is active in the construction business and has oriented its sales in an object-oriented manner. In Excel forms, all data for an object was entered manually. These forms included information about the architect, tenant / buyer, authority, client, important object information, activities, Partners etc. The problem with these lists was the enormous effort involved in maintaining data as well as the limited scope for data analysis and monitoring.

The complex contract business called for a simple solution to these diverse relationships and to present information structured and evaluable. Conventional CRM systems could not be considered because their connection to the ERP system proALPHA is too time-consuming would. Schweizer's main goals were to improve the coordination of sales activities in the five business areas, to define clear responsibilities, to gain an overview of all parties involved in the project (builders, architects, partner companies, influencers, etc.) as well as to use cross-divisional synergies and making the current state of processing transparent

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Realized achievements

The proALPHA additional object management module provides Ernst Schweizer AG with numerous functions for object-oriented sales. By using the module, the contact and sales management becomes clear and evaluable. The link to which object belongs to a customer, sales slip or order is traceable for each employee from sales to billing.

All sales activities, such as tasks, appointments, correspondence or offers can be linked to the object, customers and any other data, such as serial numbers or projects. This enables an efficient monitoring of objects and sales opportunities and offers next to more seamless Documentation of the sales process, comprehensive evaluation options.

The solution

With the functionality of the proALPHA ERP system, which Schweizer has been using for 16 years, the company was unable to achieve these goals. As several proALPHA customers showed an interest in an object management module in proALPHA, the mobileBlox GmbH, a long-standing proALPHA partner, decided to take on the requirements and develop a standard solution for the contract and construction business together with Schweizer and other companies. The result of close cooperation is the piaX property management, a fully integrated Additional module for proALPHA.

The main advantage of this integrated solution is that the processes and Data can be mapped throughout the proALPHA ERP system without the media breaks or duplicate data storage to arise. In this way, objects can now be created in proALPHA and linked to contacts, contact persons or sales documents.

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Another advantage is that information is available at the push of a button, such as „What objects is a customer involved in" or „What activities are not yet done ". The option of assigning tasks to other employees via the Activity Monitor is also provided by Schweizer Workload.

Conclusion and outlook

The introduction of piaX Object Management brought the awaited information overview. Now Schweizer has the finished mobile version of the object management integrated in MS Outlook. With these, the sales representatives can view offline and edit their object data on mobile devices. Meanwhile, the object management in proALPHA will be further developed and the versatile Requirements of the object business adjusted.
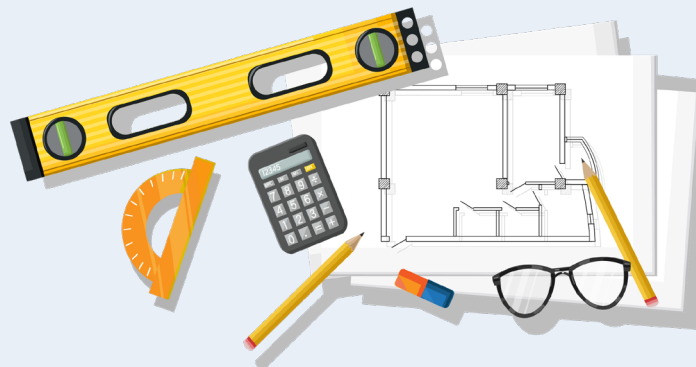
The advantages at a glance

- ✔ Full integration with proALPHA
- ✔ Quick access to information
- ✔ Evaluable data
- ✔ Overview of processing status

- ✔ Assignment of tasks via the Activity Monitor
- ✔ Object lists with important information about the object
- ✔ Assignment of participants to the object/project

For more information, contact your proALPHA partner, on the Internet at
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