

A Grading Company Uses Construction Partner Software to Improve Every Aspect of its Accounting Operations



Benefits include streamlined day-to-day job costing and P/L control, greater visibility into change orders and certified payroll, easy generation of WIP reports for bank and bonding needs and improved cash flow.

Problem

Managing nearly \$3.5M of work each year using generic accounting software was proving to be a challenge. Illinois-based excavation contractor used spreadsheets to track day-to-day job costs, manage change orders and create documents like Certified Payroll reports and G702/G703 billings.

But entering data multiple times and in multiple places was taking its toll on Midwest's lean office staff. And with its busy season just around the corner, Owner Tim P. and Accounting Manager Georgiann C. decided it was time for a change.

"Our paper trail was in all different areas rather than in one system," says Peltier.

"Construction Partner allows us to see where we're at on a day-to-day and month-to-month basis. With our previous software, we couldn't track things like change orders and retentions. Construction Partner has these features built in, so you can print reports and see what's outstanding."

Tim P. Owner

"This made it very time consuming to create reports for Tim and difficult to actually find the information he wanted," adds Georgiann.

So the two set out to find new accounting software that would handle the complex needs of a union contracting firm and eliminate the spreadsheets.

Solution

Tim and Georgiann used Internet research to create a software evaluation shortlist and quickly moved to the demo phase of their search. In addition to construction-specific functionality, ease-of-use was a top priority; they didn't have the resources to deal with a long learning curve.

After several online demos, Construction Partner software clearly stood out from the rest. "For me, Construction Partner demonstrated a smooth, easy-to-use interface compared to the others, which seemed too complex for our needs," recalls Tim. "I would agree," says Georgiann. "It was easy to move around in Construction Partner. The other systems were complicated; you had to jump in and out of different modules to go from screen to screen. Plus, Construction Partner's functionality was actually better than the other programs we looked at."

Cost was also a consideration. "Another enticing factor was Construction Partner's low support costs and annual maintenance fee," states Tim. "As an owner, avoiding the big expenses for upgrades and support that many software companies charge each year was very appealing."

They purchased Construction Partner. And, with just a few short months until business would be booming, Peltier and Carlson were counting on a swift conversion.

Results

To expedite setup, they sent Construction Partner its union, payroll, vendor and customer data, which was converted and loaded onto the software before training began. After just two days of on-site training, Georgiann was comfortable with the basics of Construction

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Partner, including the core accounting modules, Job Costing and Equipment Management. Subsequent phone training added to her knowledge of the software and addressed questions as they came up. “Every time I had a question, I would call Construction Partner and they would walk me through the answer so I could quickly move on,” says Georgiann. The most complex conversion task was getting the Payroll module configured to

firm to create financial statements, tax returns and bonding reports used to be time-consuming, Construction Partner’s reporting capabilities have changed that. “Now,” says Georgiann, “it’s easy to get the accountants the information they’re looking for using standard Construction Partner reports.”

“Our overall experience with Construction Partner, including the training and support that we’ve received, has been phenomenal. Every time we call, someone picks up the phone and is there to help.”

Georgiann C. Accounting Manager

Owner Insight: Tim and his business partner now have the owner insight needed to make better business decisions. “Construction Partner allows us to see where we’re at on a day-to-day and month-to-month basis,” he says. “With our previous software, we couldn’t track things like change orders and retentions. Construction Partner has these features built in, so you can print reports and see what’s outstanding.”

Change Order Management: Although Tim is confident that, with the previous system, money wasn’t being left on the table, the ability to easily track potential and approved change orders will shorten the billing turn-around time for changes that create a cost impact. “Construction Partner gives you visibility into pending changes and what needs to be done to get change order dollars coming back to you,” he says. “This definitely helps with cash flow.”

accurately calculate the various union rates, dues and taxes. Although Midwest Grading out-sources payroll processing, Georgiann would be creating the Certified Payroll reports in-house and needed to ensure accuracy. In addition, labor costs are an essential element of job costing and equipment management. So even though paychecks weren’t being printed with Construction Partner, the data needed to be right.

Bottom Line

In the short time since converting to Construction Partner, Georgiann couldn’t be happier with the software. “Our overall experience with Construction Partner, including the training and support that we’ve received, has been phenomenal. Every time we call, someone picks up the phone and is there to help.”

Single Data Entry: With Payroll setup squared away, Carlson was thrilled to have her double and triple data entry eliminated. “Labor and equipment information entered in Payroll flows directly to Job Costing,” she explains. “And payables also flow directly to jobs. Before, we had to enter information in several different places to get the job costs we were looking for.”

Tim concurs. “From the initial demo to the post-conversion support, I don’t think we could have found a better company to work with than Construction Partner.”

CPA and Bonding Reports: Although getting information to their accounting