

# Roofing Company Solves Payroll and Service Management Problems by Switching from Peachtree to Construction Partner Software



## Problem

For this leading Texas-based commercial roofing firm with 60-70 employees and \$10M in annual revenues, Peachtree by Sage accounting software wasn't keeping

up with its construction specific financial management needs.

Payroll issues were the biggest problem. "Our roofer burden is considerably higher than our sheet metal burden, and Peachtree

couldn't differentiate between the two," explains Accounting Manager Susan P. "Our employees frequently move between worker's comp codes and our software couldn't track the differences or accurately accrue the burden." As a result, Susan was spending several hours each week tracking payroll burdens manually.

But this wasn't the roofing company's only manual process prompting a software change. Service calls for things like roof leaks or retail finish-out work were managed using "pieces of paper," says Susan. "If each step didn't get done properly, there was a chance for unbilled service calls."

## Solution

After evaluating four or five different systems, the company replaced Peachtree with Construction Partner, a complete, fully integrated software solution designed to handle complex construction accounting needs, like

payroll, service management, equipment management, purchasing, and inventory. After an easy installation and just two days of on-site training, their accounting team was up and running.

"Construction Partner is very easy to use, which is important to us," recalls Susan. "We couldn't deal with software that had a huge learning curve. The core accounting modules were implemented while our trainer was here, but we figured out the rest of the system on our own."

## Results

Once installed, Construction Partner provided automated solutions to the roofing company's manual accounting issues. Different worker's comp codes are now automatically selected during Payroll timecard entry based on the work performed and burdens are calculated automatically. "We don't have to do anything by hand," states Susan.

Having burdens calculated within the software – rather than on a spreadsheet – has also made it easier to track job costs. "With Peachtree, we were entering job costs in the software and again on a spreadsheet. With Construction Partner, we only have to enter information once."

The company's service management process has also been automated. "Each time we get a service call it gets entered into Construction Partner's Service Billing module, where a work order is automatically generated. Construction Partner eliminates the possibility of unbilled services."

While solving their payroll and service management issues has saved hours

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of time, additional benefits from Construction Partner have been realized across the organization.

**Flexible Reporting:** To make sure that jobs are on track, project managers use a custom one-page Job Costing report that incorporates all change order activity and lists both estimated and actual costs. And for Susan, handling a recent worker's comp audit was a breeze. "Construction Partner's reporting system is very user-friendly. For the auditor, I simply printed out the requested Payroll report and she was done in a couple of hours."

**Purchasing Controls:** Construction Partner's Purchasing module has helped the roofing contractor's purchasing agent gain better control over invoice discrepancies. All material purchases are entered into the system and a purchase order is created. If the amount billed by a vendor doesn't match the purchase order, it is investigated prior to payment. This eliminates possible overpayments.

**Payables Discounts:** Another area where Construction Partner has improved accounting processes is accounts payable (A/P). "Construction Partner gives us the flexibility to take a discount as a percentage or enter a partial discount if we're only paying a few line items," says Susan. "With one of our major vendors, we get a special pre-tax discount and Construction Partner even lets us enter the appropriate amount on-the-fly as we're paying the check."

**Equipment Management:** The roofing contractor is also using Construction Partner's Equipment Management module to track service trucks and equipment such as kettles, generators, and cranes. "Tracking our assets in Construction Partner comes in handy at insurance renewal time, because it gives us one place to go for a complete listing of our property and insurance schedules."

## A Superior Customer Service Experience

Susan's company prides itself on providing outstanding customer service to its clients. That's why it's no surprise that the company has aligned itself with Construction Partner, a software developer known for this same trait. Susan is impressed by the fact that when she calls Construction Partner for support, she is greeted by a real person who is located in the United States, rather than someplace overseas. And she explains how Construction Partner helped her company out in a big way.

"We needed a specific piece of information on our work orders that wasn't standard functionality in Construction Partner, so the company programmed it into the software for us," she says. What's more, this new functionality is not a custom change that's only accessible to Superior Roofing. The new feature is now a standard part of Construction Partner and every client has access to it. "You're not going to get Peachtree to enhance anything for you. This level of service is unheard of elsewhere."

## Bottom Line

Construction Partner is a very cost-effective construction management solution for this roofing company and Susan is looking forward to a long term relationship with the software provider. "Construction Partner has saved us hours of time and has probably saved us money related to unbilled service work. But most importantly, it's delivered a convenient way to manage our business that can't be measured in either time or money."

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