Roberts Glass Gains Financial Transparency with Acumatica Construction Edition

"Acumatica Construction Edition has helped us grow revenue because we’re much more efficient at managing projects."

– Jeff Hamilton, president

OVERVIEW
Roberts Glass specializes in designing, manufacturing, and installing glass curtain walls and systems for commercial customers. Run for years on legacy Sage 50; executives lacked insight into critical KPIs due to siloed information housed in the client-server application. Roberts Glass deployed cloud-based Acumatica Construction Edition, gaining remote access for its field team, real-time financial data, and instant visibility into project profitability.

KEY RESULTS
• Gained mobile access for field teams, making them more productive
• Obtained instant access to data to make faster, better informed decisions
• Improved visibility into financial status for better decision making
• Gained seamless connection to ExakTime, speeding insights into project labor costs
• Saved controller and project managers time allowing them to concentrate on customer and internal needs

CHALLENGES
When Matt Dodson and Jeff Hamilton purchased Roberts Glass and Service three years ago, they inherited Sage 50 as its only financial software. The Indianapolis-based company specializes in designing, manufacturing, and installing glass curtain walls and systems for commercial construction contractors, those building new hospitals, hotels, retail, office, and industrial spaces.

The company’s instance of Sage was a legacy client-server application, which stored data locally on desktop computers. “Data was very siloed,” says Hamilton, president. “We also had paper spreadsheets scattered throughout the office.”

Executives had no insight into projects since the information was stored on individual project manager’s desktop computers, which also meant they had no insight into what stage a project was in, its costs, or the gross margins a project carried. Project information was not shared until months after a project ended, partly because they collected labor costs through ADP. Job site address or name information often didn’t align with Sage’s project names. A lot of manual intervention was needed to match jobs in the two systems. “We knew operating on Excel and siloes wasn’t going to allow us to grow or be more profitable or be more efficient and get information out to the field,” Hamilton says. “If I look back over the last three years, we’ve doubled revenues while maintaining our profit margins, which is a fete to have that substantial growth and maintain profits.”

Fortunately, Roberts Glass was deemed essential in Indiana during the pandemic. “We’ve been working full force, have seen no adverse effects, and actually, the first half of 2020 was a record first half for us with no signs of slowing down.”

But executives knew they wouldn’t be able to sustain that much longer with an aging system.
SOLUTION

An IT professional, Hamilton determined a Sage upgrade wouldn’t give
the company the mobile, project or construction functionality it needed,
so he began his search for construction and accounting software that
could provide those critical requirements and serve as a platform for
growth soon after purchasing the company.

He liked what he found in Acumatica Construction Edition with its
robust Project Management features, a choice that the company’s
accounting firm Somerset CPAs were familiar with and confirmed would
be good. Acumatica Construction Edition implementation partner Aktion
Associates deployed the software working with Hamilton’s internal team.

Roberts Glass also implemented ExakTime, a third-party time and
attendance application that seamlessly integrates with Acumatica
Construction Edition thanks to Acumatica’s open API.

BENEFITS

Roberts Glass executives used to wait months for aggregate financial
data. Once deployed, Acumatica Construction Edition provided real-time
financial information.

“We’ve torn down the silos we had with the client-server solution, so
now we have access in one view of the data,” Hamilton says. “We’re
now able to see where we are cost-wise with our existing construction
projects; we’re able to look at the profitability of each project, look at the
customer base and understand where we are most successful.”

Besides, all project managers have visibility into what the company has
completed year-to-date, what types of projects they are managing, and
what’s in the pipeline.

ExakTime Provides Instant Time and Expense

The seamless integration with ExakTime allows time and rates to
be pulled into Acumatica Construction Edition, giving them real-time
visibility into exact labor costs for every project.

“The information was manually input before and arrived six months
down the road and was very inaccurate,” Hamilton says. Roberts Glass
often ran into problems with ADP Time and Attendance because Sage
and ADP weren’t on the same page when it came to customer names.
When employees entered an address into ADP, the associated name
that popped up often was not the same as Sage’s internal customer
name, he explains.

“There were a lot of manual interventions,” Hamilton says.

“Now we have the ability to enter the jobs in Acumatica Construction
Edition with a job name based on what customers called it, and
employees in the field can select the right job with one click,” he adds.
“ExakTime also has GPS features so it can recognize where an address
is and search on it to find the job.”

ExakTime then looks in Acumatica Construction Edition to match it with
the right job. “It really has increased our accuracy, what hours were
worked and where employees were working,” Hamilton says. That
information is delivered in real-time, which means they can see how
profitable a project is instantly, not six months later.

Gaining Mobile Field Access

Hamilton’s next task is to provide field access for project managers
working on a job site through Acumatica’s mobile app. That’s something
they never had before.

“Our glazers may spend a half-day, or a crew may work for six or
seven months on a project and travel directly to the job site each day,”
Hamilton says. Because they had to rely on phone communication,
some items were incorrectly communicated, some tasks were
inadvertently redone, or worse, employees arrived at a job site without
knowing the current status of the project.

With Acumatica Construction Edition, employees will be armed with
an iPad with field notes for specific projects. They will have access to
architectural drawings, any attachments, and any other information.
“Before, assumptions were made, mistakes were made and it was
time-consuming to try to figure out what needed to be done to complete
a job,” Hamilton says.

Accounting Team Reduces Interruptions

Acumatica Construction Edition has freed up some of Roberts Glass’s
controller’s time because she no longer has to look up information for
others and convey that over the phone to remote workers. Previously, a
lot of financial information was saved on her computer, and access was
restricted.

Now, using Acumatica Construction Edition, which provides the ability
to set varying levels of access and security, employees have direct
access to information pertinent to their jobs. “We have dashboards, and
some have their own personal dashboards where they can look at KPIs,
revenue, projects we’ve bid on – all the information our controller no
longer has to pull for them,” Hamilton says. “Our controller is a lot more
productive without having those interruptions.”

At the same time, employees are more productive because they have
instant access to the information they need. They don’t have to call
headquarters or waste time searching for the right information,” shared
Hamilton.

Strong Foundation for Growth

Acumatica Construction Edition was easy to learn and provides a strong
foundation to help Roberts Glass continue to grow.

“What we’re trying to do is maximize our margins and profits by making
sure we’re working on projects as efficiently as possible,” Hamilton
says. “Acumatica Construction Edition has helped us grow in terms of
revenue because we’re much more efficient at managing projects.”
Having data instantly available allows executives and employees to make data-driven decisions, whether in the office or at a job site. “First thing every morning, I can see what our case-load is like, what’s in our backlog, what are our active projects, and see from an executive-level key indicators of the health of the business,” Hamilton says. “I don’t have to wait until the end of the month or two or three months after that to have clean labor data to learn the profitability of a job. With Acumatica Construction Edition, all of us have that data in real-time.”

While Roberts Glass has no immediate plans to expand through acquisitions, “I'm confident that if we find a business we want to acquire, we can get them going quickly with Acumatica's cloud-based system.”

“Acumatica Construction Edition and ExakTime have increased our job accuracy surfacing hours worked on a job and the location of the job giving us insight into project profitability.”

– Jeff Hamilton, president