

## Roberts Glass Gains Financial Transparency with Acumatica

### 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.

### 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 specialized 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

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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.”

### **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.”

### **About Aktion Associates**

In business since 1979, Aktion Associates Inc., is a national software reseller and IT system integrator focused on the Construction, Distribution and Manufacturing industries. We partner with innovative technology providers to deliver vertical specific business ERP applications. Company-owned data centers provide secure cloud hosting, disaster recovery and back up services, and the Network Operations Center (NOC) monitors managed services clients. Aktion is an IT infrastructure provider for IBM, HP, Lenovo, Cisco, VMware and Microsoft technologies. Other deliverables include network engineering, software engineering, and on-premise IT support.



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