



Software Professional Center

4646 South 3500 West, Suite 2
West Haven, UT 84401
www.utahspc.com
1-866-446-5552

CUSTOMER SUCCESS STORY



PACIFIC SHEET METAL

Pacific Sheet Metal is a heating and air conditioning company located in Carbondale, Colorado with over 80 employees. Pacific Sheet Metal needed a job based software instead of their previous accounting experience with PeachTree’s client based software. Lowell Walter, Chief Operating Officer and General Manager, was in charge of heading the transition to a better software solution. Lowell knew that the ability to sort data, another key Master Builder feature, would also benefit Pacific Sheet Metal. Pacific Sheet Metal wanted something that would integrate with both roofing and HVAC as well.

The Problem

For Pacific Sheet Metal, the volume of transactions per day soon reached beyond the limit of PeachTree’s accounting capabilities. “We were doing about 4,000 transactions a month—we have a lot of jobs that are over 100,000 dollars each.... Our current system couldn’t handle the volume of transactions. By the time we ran checks, payroll checks, accounts receivable checks, and accounts payable deposits, PeachTree just couldn’t handle it,” said Lowell.

PeachTree’s system would get so slowed down that it was impossible to work with. “It was trying to work with a filing cabinet that had too many files in it. It would still hold them all but it wasn’t easy to sort through because there’s no space,” he explained. Also, with transac-

“ I’D RECOMMEND MASTER BUILDER TO ANYONE NEEDING BETTER TRACKING AND JOB COSTING.”
-Lowell Walter, Pacific Sheet Metal

CUSTOMER:

Pacific Sheet Metal

LOCATION:

Carbondale, CO

PREVIOUS SOFTWARE:

PeachTree Accounting

Technology Platform:

Windows 2003 Server
Windows Terminal Services

SPECIAL ISSUES:

Time and Material Billing
Service Dispatch
Job Costing
Roofing and HVAC

tions building up quickly, the delay in PeachTree became even more noticeable.

“We’re dispatching about 80 guys a day and transactions add up quickly,” said Lowell. “We found plenty of programs that would integrate with HVAC but not roofing, and vice versa. So we started looking for a contractor software instead of a subcontractor software. I really love that the fields are customizable and have flexibility.”

Tracking was another issue that needed to be resolved. “We wanted to know exactly what was going on with each and every job, and we wanted the ability to sort that data,” said Lowell.

The Transition

As most contractors are aware, the toughest part of any conversion is the first day. Initially, Pacific Sheet Metal used only online training tools to implement the system. Lowell then used consultants to help make the transition easier on his employees. “It was definitely a tough change, but it was worth it.”

“If someone was to make a transition like this- from client based, with no job costing, to job based, it would be in their best interest to have someone actually come for maybe a week and hand-hold through the change. It would definitely be time well spent. Although most think it would be expensive, you need to consider the productivity lost—I think it would pay for itself.”

Lowell’s cooperation with consultants resulted in great rewards for Pacific Sheet Metal. “Master Builder is so flexible that it gives you about 13 different ways to skin a cat. Luckily, we were able to get some help to figure out where we needed to go. We’ve really been able to utilize the staff at Software Professional Center as far as consulting and custom report writing goes,” he said.

Another benefit of the Master Builder software was the modifiable report forms. “Rob and Mark have really been able to make Master Builder fit the custom needs that we have,” he said.

The Outcome

Lowell can see many improvements from their previous system, but especially in the time and materials billing. “Master Builder has given us a way to really calculate what our actual costs are on time and materials work and track those materials better.”

Lowell also notes that the ability to track his time and materials have saved a substantial amount of money just in the first six months of using the Master Builder software. “I’ve seen my time and materials cash flow double in 2 or 3 months, without adding any more employees or taking on any more gross sales- just because we can watch our time and materials better. Looking back, we were giving away tens, if not hundreds of thousands of dollars every year because of not tracking time and materials right. That in itself paid for all of the software and all of the computer upgrades that we had to do to get Master Builder up and running just in the first six months. I’d recommend Master Builder to anyone needing better tracking and job costing.”

Sage Software, the Sage Software logos, and the Sage Software product and service names mentioned herein are registered trademarks or trademarks of Sage Software, Inc., or its affiliated entities. All other trademarks are property of their respective owner.