SOCKEYE Sage Partner

Sage Intacct + Procore Transform Construction Company's Operational and Financial Processes

pahlisch COMMERCIAL

Case Study: Pahlisch Commercial and Sage Intacct

THE OVERVIEW

Pahlisch Commercial, a distinctive entity in the commercial construction industry, specializes in building apartment complexes. Originating from the Pahlisch Family of Brands, Pahlisch Commercial branched out to become its own entity nearly seven years ago. This transition marked the beginning of a new chapter, as they embarked on fine-tuning their projects and processes.

THE CHALLENGE

Aging Sage 300 CRE Software

As Pahlisch Commercial expanded its operations, the limitations of its existing accounting system, Sage 300 CRE, became increasingly evident. The company faced a series of challenges that hindered its efficiency and growth potential.

Pahlisch Commercial's Needs

Decentralization and the Need for a Cloud-Based System: Pahlisch Commercial's structure, spread across multiple locations, necessitated a more adaptable and accessible accounting solution. The centralized nature of Sage 300 CRE was not conducive to the company's dispersed and agile work environment.

COMPANY OVERVIEW

Pahlisch Commercial, a branch of of the Pahlisch Family of Brands, is devoted to developing exceptional rental spaces, guided by their motto, "Bringing Community Home." In their seven-year journey, they've focused on mixed-use developments, valuing community connection and maximizing worth. Their reputation in innovative, quality multi-family spaces underscores their dedication to community-focused strategic investments.

EXECUTIVE SUMMARY

Previous Software:
Sage 300 Construction and Real Estate

Results with Sockeye:

- Enhanced Integration with Procore
- Increased Flexibility and Mobility
- Improved Operational Efficiency
- Superior Job Costing Capabilities

Integration with Procore for Streamlined Operations

Another critical requirement for Pahlisch Commercial was the integration with Procore, a central repository for all their job information. The inability of Sage 300 CRE to seamlessly integrate with Procore presented a significant bottleneck. This integration was vital to ensure efficient management of their extensive project details and maintain the flow of information across platforms.

Inherent Limitations of Sage 300 CRE

Difficulty in Accessing Information: Sam Butler, Pahlisch Commercial's Controller, pointed out the challenges in locating necessary data within Sage 300 CRE, a problem that significantly slowed down decision-making processes and operational efficiency.

Limited Drill-Down Capabilities

The system's inadequate drill-down capabilities further compounded these challenges. These limitations made it difficult to gain in-depth insights into financial data, crucial for a company dealing with multifaceted construction projects.

Navigational Challenges

The user interface of Sage 300 CRE was not intuitive, making it challenging to navigate. This aspect of the system was particularly problematic for a company in a phase of rapid growth and evolution, where quick and easy access to information is paramount.

These challenges collectively underscored the need for a more modern, flexible, and integrated accounting system.
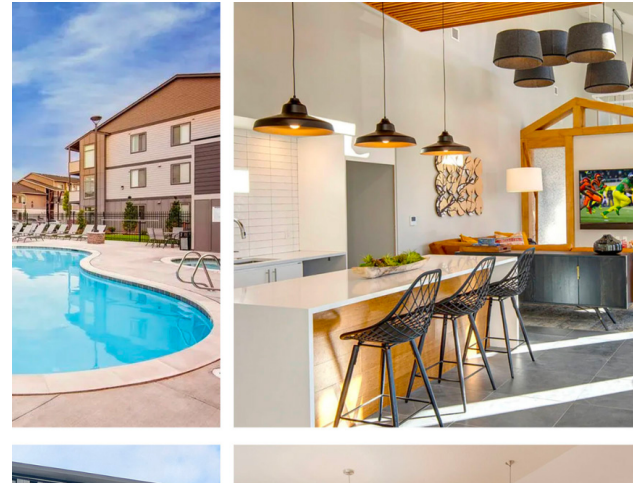
THE SOLUTION:

Making the Switch to Sage Intacct Construction

After carefully considering their needs and the limitations of Sage 300 CRE, Pahlisch Commercial decided to switch to Sage Intacct Construction. This decision was driven by several key factors that aligned perfectly with the company's operational requirements and growth trajectory.

Choosing Sage Intacct for Cloud-Based Flexibility

The primary appeal of Sage Intacct was its cloud-based nature. This feature offered the flexibility and mobility essential for the company's decentralized structure, allowing team members to access the system from any location without the need to remote in to a centralized server.

Pahlisch Commercial's decentralized structure, spread across multiple regions, necessitated a more adaptable and accessible accounting solution.

Superior Job Costing Capabilities with Sage Intacct

Another critical aspect that set Sage Intacct apart was its advanced job costing capabilities. For a company specializing in complex construction projects, having precise and detailed insights into project costs is invaluable. Sage Intacct's ability to provide more specific details on projects and costs meant that Pahlisch Commercial could manage their financials with greater accuracy and insight, aligning with their strategic objectives and enhancing overall project management.

Procore Integration as a Deciding Factor

A significant driving force behind choosing Sage Intacct was its integration with Procore's Construction Software. Pahlisch Commercial heavily relied on Procore for housing all their job information, making it imperative to have an accounting system that could integrate smoothly with this platform.

THE OUTCOME
Operational and Financial Excellence

1. Enhanced Flexibility and Mobility

The switch to Sage Intacct significantly improved Pahlisch Commercial's operational flexibility and mobility. The cloud-based architecture of the software was ideal for their decentralized operations, enhancing data access across various locations. Sam Butler, the company's Controller, highlighted this advantage by stating, "Being able to be cloud-based gives us so much flexibility and mobility as we're moving through the regions." This adaptation led to a considerable improvement in operational efficiency, streamlining processes and reducing the need for remote system access.

2. Advanced Job Costing Features

Sage Intacct's job costing features provided Pahlisch Commercial with deeper insights into project costs. This advancement allowed for more precise budgeting and cost management. Butler noted the improvement, "The job costing is much better in Sage Intacct than it was in Sage 300. We're now able to get more specific details about our projects and costs."

3. Enhanced Procore Integration

The integration of Sage Intacct with Procore Construction Software was a transformative aspect of this transition. Butler mentioned the benefits of this integration: "Previously with Sage 300 CRE and Procore, we were only able to see data from our main books. Now with Sage Intacct's integration with Procore, we are able to see all information across entities and overall get more information into Procore."

> **"**
>
> Being able to be cloud-based gives us so much flexibility and mobility as we're moving through the regions.
>
> **"**
>
> **Sam Butler**
> Controller,
> Pahlisch Commerical

The integration of Sage Intacct and Procore allowed for pivotal changes:

- **Real-Time Data Access:** Essential for decentralized operations.

- **Elimination of Double Data Entry:** Boosted efficiency and accuracy.

- **Enhanced Job Costing Insight:** Improved project profitability analysis.

- **Auditable Logs for Change Orders:** Ensured accountability in billing.

- **Financial Control with Approval Workflows:** Added data integrity and control.

This integration was perfectly tailored to Pahlisch's unique operational needs, marking a significant enhancement in their project management and financial strategy. For more details about the Procore and Sage Intacct integration visit https://sockeyeconsulting.com/technology/procore-accounting-integration/.

WORKING WITH SOCKEYE
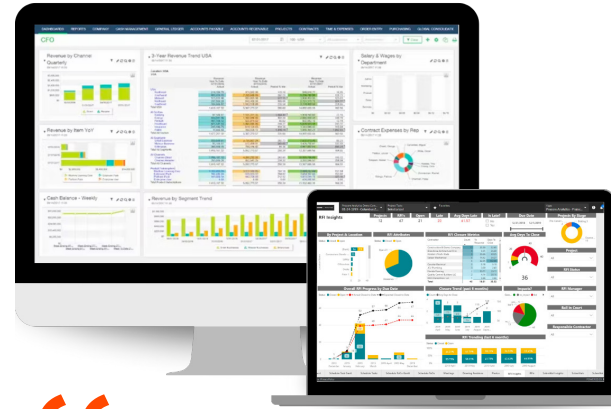### A Collaborative and Supportive Experience

Pahlisch Commercial's journey of implementing Sage Intacct was successful with the support and expertise provided by Sockeye. Reflecting on the experience, Sam Butler appreciated the invaluable assistance they received, particularly during the initial stages of the implementation.

Sockeye's consistent availability and hands-on assistance played a crucial role in streamlining their business processes and enhancing their accounting functions, making the transition to Sage Intacct a smoother and more efficient experience.

Advice for the Industry

When it comes to transitioning to a new accounting software, Sam Butler of Pahlisch Commercial offers insightful advice based on their experience. Butler emphasizes the importance of data cleanliness and organization during the transition process. "Make sure all of your data is really clean and well outlined before beginning the implementation process," she advises. Butler also suggests timing the transition strategically: "I would say do it during a slow month, do it when you don't have many checks outstanding, make sure all of your things are clean, all of your accounts are really well reconciled." Ensuring a well-planned and orderly transition is key to minimizing disruptions and maintaining operational continuity.

PROCORE®

> "With Sage Intacct's integration with Procore, we are able to see all information across entities and overall get more information into Procore."

Sam Butler
Controller,
Pahlisch Commercial

ABOUT SOCKEYE

Sockeye is a leading consulting services firm that leverages Sage Intacct to help construction businesses achieve full cohesion and transparency between operations, finance, and accounting.

Contact us today for a demo and see how Sockeye can simplify your accounting ecosystem.

▶ 907.258.2642 | info@sockeyeconsulting.com