



# CASE STUDY

After Losing a Bookkeeper, a Contractor  
Finds Something More

*BY FOUNDATION SOFTWARE*

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## After Losing a Bookkeeper, a Contractor Finds Something More

Just imagine: the dreaded moment has arrived. Your long-time bookkeeper, who manages the company's finances, who knows the intricacies of the filing system, who mastered your accounting software — and so much more — has left your company. The panic sets in as you realize you'll have to find a replacement, get them up to speed and educate them on the system as you attempt to fill the gaping hole in your business.

That's where FOUNDATION® user Chris Romero found himself when his bookkeeper left Romero Construction — a remodeling contractor and custom home builder on the San Francisco peninsula. Already used to wearing multiple hats as president and owner, Chris made the decision to take on the job of interim-bookkeeper and teach himself the trade while searching for the right person to fill the position.

After a short time of handling the books on his own, Chris learned that Foundation Software offers bookkeeping services that work directly with his construction accounting system. "After talking to Marty at Foundation, we decided it would be a good thing for us," remembers Chris.



"It was just very attractive," he says. "The people doing the data entry understand what kind of information we're trying to get out of the system." That's because Foundation's account administrators are more than temps; they're specialists in construction payroll and bookkeeping processes. By taking on the nitty-gritty of data entry and reporting, they free up construction CPAs to focus on valuable high-level financial guidance and contractors to focus on building their business. "Everyone there is exceptional."

Foundation's bookkeeping services help Chris and his team with daily, monthly and annual accounting tasks. These include setting up vendor records, processing daily invoices, and performing banking services such as cash account reconciliation, assistance with financial statements and journal entry input.

For Chris, the experience has only been positive. While some may take it for granted, Chris says the fact that he can have "confidence that things are going to the right place" is a big deal. It means he never has to worry. After getting used to entering everything himself, having Foundation on his side eliminates both the extra work on his plate and the stress of finding just the right person. Now, even if Romero Construction does bring in another bookkeeper, Chris knows that he always has a team working for him to cover the gap.



Foundation Software is the developer of FOUNDATION® — America's #1 Construction Accounting Software. Since 1985, we've been dedicated to giving contractors the back office tools they need to manage their job cost accounting and project management, with on-premise, cloud and mobile.

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