



# FOUNDATION IN ACTION

Job Costing Comes Together for  
a Service Contractor

BY FOUNDATION SOFTWARE

 **FOUNDATION**  
software

# FOUNDATION IN ACTION

## Job Costing Comes Together for a Service Contractor

"I was always a QuickBooks person," Karen admits. "I loved it." Prior to joining R.V. Carey's Plumbing & Heating as their controller, she worked for a major public accounting firm. At the time, most of her clients used a QuickBooks small business accounting package. One of those was R.V. Carey's, a long-time QuickBooks Pro user — and a devoted one at that.

R.V. Carey's is a family-owned company going back to 1979, with a contracting division taking on multi-million-dollar projects and a thriving 24/7 service division for same-day plumbing. They've grown substantially over the years, and while they'd seen a great deal of success using QuickBooks, each division began to identify that they could really use something more.

### Growing Pains

As the company grew, it was taking on bigger jobs. Meanwhile, its PMs really wanted a deeper, detailed insight into their projects. "QuickBooks gave us some job costing capabilities," Karen says, "and at first it was fine." General-purpose accounting software does often have a basic ability to track costs to customers or items or to offer other workarounds.

However, R.V. Carey's PMs didn't feel like they were getting their finger on the pulse of their jobs. They needed to be able to do more with subcontracts. Also, they needed more change order management. And they





needed more dimensions of reporting. All of that was pointing beyond even the best general-purpose accounting software on the market.

At the same time, R.V. Carey's was sending out service technicians to Maryland, Virginia and the District of Columbia for same-day service with fully stocked trucks. So service dispatch software was a *must*. Not to mention multi-state payroll, the need to track multiple inventory locations, and time-and-material billing.

In the end, they needed job costing and service dispatch software that was powerful, integrated and mobile. It would just take time to get comfortable with the idea — and a lot of research.

## Growing Into a Solution

R.V. Carey's landed with Foundation Software in fall 2016. But it wasn't a whirlwind romance between client and vendor. "We contemplated it for over a year," Karen says. She admits that she had a strong attachment to QuickBooks — she was an advocate for what wasn't broken in their current system. And really, that helped everyone to make sure FOUNDATION® really was the best fit for them. The sales team walked alongside them through the whole process.

"Pat was great," she remembers the sales manager who worked with them. He toured them around FOUNDATION as many times as they needed, kept up with them over the months and answered their questions. Pat even worked with R.V. Carey's third-party payment-cycle vendor to make sure their integration would be as smooth as possible. "He was very helpful." In the end, "We just decided we really needed to do it."

Even though there was a learning curve, Foundation Software's trainers were there to help. "A lot of us didn't have experience with this — the purchase orders and the different boxes you have to check or not check. It was a transition time for us." By January 1, they were running live on FOUNDATION, and while they still had a lot to learn, they've been pleased with the resource they have in Foundation Software's support department. "It's been excellent," Karen confirms. "It's been key in helping us feel like we've got a life vest."

## Growing Together

“FOUNDATION has definitely helped,” she says. “Especially for our project managers. They get job progress data right away.” From a management perspective too, “the added controls are good. It helps accountability to always have a record of who did what in the system when.”

Karen agrees it’s even been winning her over too. “It definitely has. As I’m getting more used to it, you see the value of it. I would have to create spreadsheets to do what we do in FOUNDATION. Now it’s just there.” She also likes that the Executive Dashboard puts key reports in one place, with colorful charts she can drill down into. “I’m getting into the detail of things,” she says. And that’s something any controller can appreciate.

She knows they were hesitant at first — and not without reason. Making a change from the familiar is a challenge personally and as an organization. It takes time to feel settled. But, she concludes, “We knew a year later we’d look back and say this was a good move.” For Karen and R.V. Carey’s Plumbing & Heating, experience is proving them right in their wisdom. They know they’re only moving forward.



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.

[WWW.FOUNDATIONSOFT.COM](http://WWW.FOUNDATIONSOFT.COM)