FOUNDATION IN ACTION

Aire Sheet Metal Finds Something More Substantial on the Cloud

BY FOUNDATION SOFTWARE

∧FOUNDATION
software

FOUNDATION IN ACTION

Aire Sheet Metal Finds Something More Substantial on the Cloud

"It was a decent system," Alex remembers, "but it didn't do what we wanted to do." Aire Sheet Metal, Inc. and controller Alex were in a situation familiar to many contractors. Their accounting software was . . . fine. No major problems, good support, highly capable — but it wasn't taking them where they wanted to go, and it wasn't going everywhere they were. Was that enough to change vendors after 15 years?

Aire Sheet Metal is a Redwood City mechanical and architectural sheet metal contractor with thriving HVAC services that take them all over the bustling Bay Area. "If my PMs were on a jobsite, they couldn't access the system," Alex says, "which means they couldn't access the information." They lost time traversing the bay, traveling back and forth from the office to jobsites to meetings with clients. Whether it was to get into their accounting system or to pick up project documents, they knew all that mileage wasn't driving them forward.

"The goal of construction moving forward is to be anywhere at any time, and our previous software just couldn't do that."

FOUNDATION software

An Uplifting Sales Process

Aire Sheet Metal investigated numerous cloud options for comparison. FOUNDATION SaaS™ stood out, in large part because of the company behind it. "When we interviewed other vendors, whoever was giving the presentation was just a pure sales person. They didn't know the ins and outs of construction or even how the system worked." Alex would ask questions, but their sales people just didn't know the answers.

"Tom, who gave the demo for FOUNDATION, was a former trainer," Alex recalls. In fact, Tom had spent over seven years training users on FOUNDATION before moving onto the sales side. His background not only prepared him for Alex's questions — it gave him the landscape for how contractors, PMs, account managers and controllers actually use the system for their businesses. More than just giving Alex a peek inside the system, "he was really able to show us how it worked."

But a background like Tom's isn't unusual at Foundation — it's actually the norm. Foundation's sales staff combines several decades of experience supporting and training clients on the software they sell, and that includes the sales director. As it turns out, there was zero chance Alex would be shown FOUNDATION by someone who hadn't seen their software implemented with numerous real-world contractors. And that's by design.

A number of considerations tipped the scales toward going with FOUNDATION SaaS™, including its affordability. "Cost was a big deciding factor," Alex says, "but we also liked that you guys knew what you were talking about."

Light and Free

By January 1, they were live on FOUNDATION SaaS™ and securely accessing data wherever they worked. "It was a lot easier because it was all online," Alex offers. "If we wanted to look at a module, everyone could view it at the same time and ask the trainer questions. The communication back and forth was great." He adds, "The training itself was great."

Because their database is hosted on Foundation's secure off-site equipment, Aire Sheet Metal's trainer was able to do a lot of the heavy lifting for them and made what could have been a painful process feel more seamless. "If it was on my own servers, it would have been a much more difficult transition." Alex remembers, "Our trainer was able to take all of my data and import it into the system. I didn't have to do much."

Alex can hardly count all the benefits now, though he can certainly begin to if asked. But there's no question what it all comes down to for his company: "Since we started, we're more flexible. Flexibility is key." Now whether they're in the Redwood City office, meeting in San Francisco or working from home, they can simply log in to get access to the complete software. Plus, all updates, backups and server security are handled without Alex having to give it a thought. Even their binders of project documents can migrate safely onto Foundation's cloud. "The thing I like best is that it's not on my servers. That it's SaaS-based makes a world of difference."

And for all the access they've gained, as far as Alex is concerned, their system security has only improved. "Every single task, report, maintenance item, module, can be turned on or off for each user. That wasn't the case before." On their previous system, if someone had access to A/P, for example, they had access to everything in A/P — payroll too! FOUNDATION's security settings let him oversee everything and tailor it to their company. "I don't have to worry about anyone changing something or seeing something they shouldn't."

Neither does being lighter and freer in their accounting software mean they've sacrificed capability. Alex is thrilled with the job costing features of FOUNDATION SaaS. "It's one of my other favorite things. Every person in

∧ FOUNDATION software

every company likes to see things differently." He says no software is going to have the one ultimate report that makes everybody happy. Estimators, project managers and controllers might want to see the same numbers in different ways, but now those preferences are easy for him to meet. "The ability to create my own reports for different purposes within five or 10 minutes is huge."

> " **THE ABILITY TO CREATE MY OWN REPORTS FOR DIFFERENT PURPOSES WITHIN FIVE OR 10 MINUTES IS HUGE.** "

Elevating Standards

Alex is realistic, and he's eager to give feedback. He knows no system is going to be perfect for every company and no vendor is perfect. But that's also where he finds a lot to appreciate: "The biggest thing that I've seen with Foundation," he insists, "is that it's always looking to get better. I'm always looking for that in an employee — it's the same thing with accounting software. Foundation listens to user feedback, and there's a willingness to constantly improve."

"There's so much we want to do," he concludes, and Aire Sheet Metal is looking to Foundation to help them get there. Alex sees that soon tablets will be in everyone's hands on the jobsite, and he knows his company is going to be a part of the changing pace of construction. Foundation's mobile apps are eager to go onto those tablets, and Aire Sheet Metal recognizes that Foundation's technological development isn't slowing down either. "FOUNDATION has a lot in it I haven't gotten to explore yet. I'm definitely going to dive in."