

Armanino Helps Dexter + Chaney Deploy Sage Intacct and Shorten Close by 10 Days

CASE STUDY



armanino

At A Glance

Customer Profile:

Founded in 1981, Seattle-based Dexter + Chaney, LLC supplies the construction industry with cloud-based construction software for business and operations. The company decided to update its legacy accounting system to more modern, cloud-based financial software that offers integration with its sales software for end-to-end visibility, greater productivity, and improved scalability.

Software & Services

- Sage Intacct Core Financials
- Sage Intacct Modules: Multicurrency, Order Entry, Revenue Management, Advanced Revenue Management/VSOE, AvaTax, Time & Expense, and Project Accounting
- Sage Intacct-Salesforce Integration Pack from Armanino
- Armanino consulting and implementation services

Benefits

- Accelerated time to close by 10 days
- Eliminated manual re-entry of order data and the need for spreadsheets
- Improved productivity and work flexibility for accounting staff with anytime, anywhere access to the financial system

Challenge

Headquartered in Seattle, Washington, Dexter + Chaney is the leader in cloud-based construction ERP software and developer of Spectrum Construction Software. From the office to the field, accounting to project management, Dexter + Chaney software is used by more than 1,100 companies across all segments of the industry—including heavy/highway and utility, general contractors, electrical, mechanical, and specialty subcontractors.

When Brian Rice joined Dexter + Chaney as chief financial officer (CFO) in 2015, the company had been using the same legacy accounting system for decades. “The system did not integrate with Salesforce and SteelBrick, so it impacted our ability to manage our overall order-to-cash processes,” said Rice. He quickly decided it was time to move to a more modern, integrated financial system based in the cloud.

“Our foremost issue was integration between Salesforce, our customer relationship management (CRM) system, and the accounting system,” says Rice. In the past, the company was forced to manually re-enter order data during the quote-to-cash process. “We couldn’t continue to grow the company effectively without having a single point of truth between Salesforce and our accounting system”, he says. Rice also wished to improve project accounting for Dexter + Chaney’s professional services business.

Solution

After evaluating options for a new accounting system that could integrate with Salesforce, Dexter + Chaney chose Sage Intacct Core Financials as its cloud-based financial software. The company also chose Sage Intacct-Salesforce Connector for integration between its new financial software and its sales system. “Sage Intacct’s integration with Salesforce is extremely robust,” says Rice.

The company turned to Sage Intacct partner Armanino LLP to deploy the software, migrate from the legacy accounting system, and implement the integration between Sage Intacct and Salesforce. Armanino is one of the largest independent accounting, business, and technology consulting firms in the U.S.

Rice appreciates the insight and expertise that the Armanino team brings to Sage Intacct deployment projects. “Because of its deep software experience, Armanino provides a unique level of independence,” says Rice. “We got the straight scoop on the software we were choosing, which helped us make the best decisions about the appropriate integrations.”

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-Brian Rice

Results

Now with its new cloud-based financial software integrated with its Salesforce solution, Dexter + Chaney has eliminated manual data re-entry and gained greater efficiency, speed, and visibility into sales and business performance.

"We're seeing all sorts of efficiencies in how Sage Intacct and Salesforce work together," says Rice. "For instance, we're now closing the books 10 days faster." With processes such as revenue recognition automated in Sage Intacct, the accounting team no longer has to rely on manual efforts to fill gaps in the previous accounting system. "We don't have to worry about spreadsheets anymore," says Rice.

Having its accounting system in the cloud also gives the Dexter + Chaney accounting team greater work flexibility and helps improve work/life balance. "The anytime, anywhere access we get with Sage Intacct means that our people can be productive outside of the office—whether that's at a conference, on a plane, or at home," says Rice. "I recently closed orders on a cross-country flight, which is pretty amazing."

About Armanino

Armanino provides an integrated set of accounting services—audit, tax, consulting and technology solutions—to a wide range of organizations operating both in the US and globally. You can count on Armanino to think strategically, to provide the sound insights that lead to positive action. We address not just your compliance issues, but your underlying business challenges, as well—assessing opportunities, weighing risks, and exploring the practical implications of both your short- and long-term decisions. When you work with us, we give you options that are fully aligned with your business strategy. If you need to do more with less, we will implement the technology to automate your business processes. If it's financial, we can show you proven benchmarks and best practices that can add value company-wide. If the issue is operational, we'll consult with your people about workflow efficiencies. If it's compliance, we'll ensure you meet the requirements and proactively plan to take full advantage of the changes at hand. At every stage in your company's lifecycle, we'll help you find the right balance of people, processes, and technology.

CONTACT

Scott Schimberg

Partner | Armanino Advisory LLC

Scott.Schimberg@armanino.com | 925 790 2622

armanino.com/sage-intacct