

Success Story

Lunar Companies elevate their financial insights with Sage Intacct Construction



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Morgan Schweitzer,
Controller, Lunar Companies



The challenge

Lunar Companies outgrew QuickBooks and chose a construction accounting software, but after five months and unexpected costs, they still hadn’t gone live. Their new controller realized the solution couldn’t provide the multi-location reports they required.



The solution

Sage Intacct Construction, a native-cloud accounting solution, offers the multi-location reporting Lunar needed. It enables construction financial teams to make critical decisions, track costs, and manage productivity in real time from any location.



The result

Sage Intacct Construction provides Lunar Companies with the essential foundation they need to sustain their impressive growth. This includes:

- Customizable reporting that delivers real-time visibility.
- Improved transparency and oversight of financial reporting.
- Vendor compliance tracking to help streamline audits.

Sage

Company
Lunar Companies

Location
Indiana, USA

Industry
Construction

Sage Products
Sage Intacct Construction

LUNAR
COMPANIES

About Lunar Companies:

Lunar Companies is a privately held corporation that has been in the construction industry since 1998. Lunar Companies does foundations, slabs, other concrete work, and water and sewer installations for new home builders.



Growth fuels the need for change

Lunar Companies has experienced tremendous growth in the last few years. They added a transportation division, expanded throughout the region, and more than tripled their annual revenue. While the team was ready to keep the momentum going, it was clear that QuickBooks couldn't keep up with their accounting needs.

They began their search for a construction-specific solution with thorough job costing, labor, and equipment tracking, that could be used on multiple job sites, for multiple divisions, in multiple states. After researching 14 different technology companies, they chose a Sage competitor they thought would meet their needs—but things didn't go as planned.

Not all solutions meet expectations

After five months and tens of thousands of dollars in unexpected fees, they still didn't have a go-live date for the implementation. The company hired a new controller, Morgan Schweitzer, who took the reins in getting the new software operational to provide the financial reporting and forecasting the team needed. However, it soon became clear to Morgan that the new solution couldn't deliver the functionality they were looking for, such as breaking down job costs the way they wanted and comparing their profitability on different job sites in different states.

Morgan had a discussion with the CEO of Lunar Companies, in which she laid out how their current accounting solution was setting them up for failure. They made the difficult decision to accept the sunken cost and begin the process over with a new construction accounting solution that could deliver the functionality they needed.



Sage Intacct Construction checked all the boxes and delivered the reports and insights Lunar Companies had long searched for.

The path to Sage Intacct Construction

Morgan knew the stakes were high to get it right this time. “If I could give anyone a piece of advice when looking for new software: you have to know why you want a new solution, and exactly what you want that software to do,” says Morgan. She knew she wanted software that could produce the reporting the company was after, could track multiple divisions across multiple locations, and was cloud-based to give the team the flexibility to work and collaborate remotely. After talking to some peers, and as a previous Sage user herself, she turned to Sage Intacct Construction.

Trust and innovation

Sage Intacct Construction is a native-cloud financial management solution, purpose-built for the construction industry, combining 50 years of construction technology expertise, with the only accounting software preferred by the AICPA. Features such as real-time visibility, insights, and reporting, alongside a dimensional general ledger, customizable dashboards, and comprehensive job cost tracking and billing, appealed to Morgan. However, Morgan needed to be absolutely certain Sage was the best fit for their needs. To do this, she relied on the Sage Partner Network—the largest and most trusted in the industry.

A partner in success

Before making a final decision, Morgan met with the Implementation team to get a clear understanding of solution capabilities and what the implementation process would look like. They understood what Morgan and the team were looking for and developed a plan to streamline the implementation process and get Lunar Companies live and operational in a condensed time frame. Within four months, Morgan was able to easily enter their financial information into Sage Intacct Construction and start producing the exact reporting Lunar Companies had been promised by other accounting solutions but had never materialized. “This was the sixth or seventh accounting software implementation I’ve been through, and the Sage Partner team was the best I’ve ever worked with,” said Morgan.

Delivering results

Sage Intacct Construction checked all the boxes and delivered the reports and insights Lunar Companies had long searched for. Morgan and the team can now put dimensions on transactions and slice and dice data in different ways to get detailed insights into their different projects, locations, and divisions. Sage Intacct Construction also delivered added benefits they didn’t even know they needed. “We had been tracking all our vendor compliance information in Excel spreadsheets but now we have all of our vendor information in the same software as our accounting, which is a nice perk,” said Morgan.



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Primed for growth

Lunar Companies found the perfect fit with Sage Intacct Construction. The open API allows them to integrate with other solutions they are using and gives them the flexibility to build out their tech stack as their needs change. And there’s still room to grow. “Sage has so many different levels of data that you can pull from. Even if it is something you don’t need now, it sets you up for potential growth in 5 to 10 years,” adds Morgan. “Sage Intacct Construction provides the framework and now we just get to grow on it, which is great.”

A trusted provider for construction

Now, Sage for Construction Essentials delivers the full breadth and depth of Sage Intacct Construction at an affordable price enabling an essential foundation on which smaller businesses can grow and thrive.



Sage



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