<syncIO/>Labs

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CASE STUDY

OPERATIONS DASHBOARD

From 25 Hours of Manual Reporting to Real-Time Visibility

NEW STEEL STRUCTURES

- Dashboard
- WIP
- Overhead
- Cashflow
  - Health
  - Forecast
  - Collections (AR)
  - Payments (AP)
  - History
- Projects

Cashflow Tracking: *Where did it come from? Where did it go?*
Aug 4 - Oct 27, 2025

`13 Weeks` `52 Weeks` `⟳ Sync Now!`

TOTAL COLLECTIONS
$774,455
Avg: $59,574/week

TOTAL PAYMENTS
$781,227
Projects: $657,070 | Overhead: $23,537 | Payroll: $100,620

NET CASHFLOW
$-6,772
$6,772 deficit

DAYS CASH ON HAND
42 days
⚠ Critical

13-Week Cashflow Analysis

PROJECT
Overview

New Steel Structures was scaling fast. From Texas to Florida, the company was managing $14M+ projects simultaneously across five states.

The tools were solid: QuickBooks for accounting, Excel for analysis, SmartSheet for project tracking. Each did its job. The problem? **They didn't talk to each other.**

> **"The Director of Operations was spending 25-30 hours per week on data entry and report assembly."**
>
> Time that should have been spent on strategic work.

THE CHALLENGE
The Problem wasn't the tools — It was the Gaps Between Them

01 Triple data entry:

When bills were received from vendors, the data was entered into QuickBooks Online, then in SmartSheets for project tracking and then again in Excel for final reporting to ownership.

02 Stale data:

Tuesday WIP reports were already a week old. Spreadsheets were scattered, and it was hard to keep up with the latest numbers across multiple projects.

03 Human error:

Transposing data across $200K worth of bills and invoices was inevitably creating confusion as to what numbers can be trusted.

THE SOLUTION
One Dashboard. One Truth. Synced Every Day.

Rather than add another disconnected tool,
we built a custom operations platform —
a unified dashboard that pulled directly
from QuickBooks and served as the single
source of truth for the entire operation.

✓ Single Source of Truth Principle

✓ Integration, Not Replacement

✓ Time Recovered. Errors Eliminated.

Work In Progress (WIP)

Cashflow Management

Dashboard

Overhead Allocation

Project Tracking
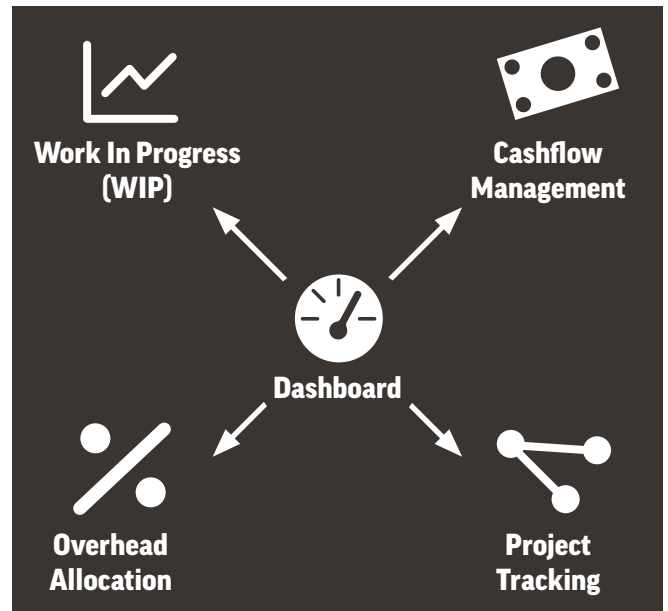
CORE PRINCIPLE
Integration, Not Replacement

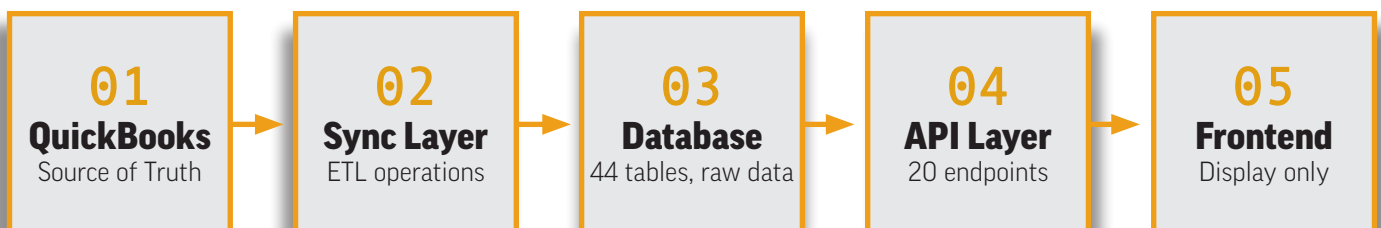| 44	20	3am	5
Database Tables	API Endpoints	Daily Auto-Sync	Layer Architecture

The dashboard didn't replace QuickBooks or eliminate Excel entirely. Instead, it
became the connective tissue — automatically syncing financial data overnight and
presenting it in operational context that off-the-shelf tools couldn't provide.

THE ARCHITECTURE
The Single Source of Truth Principle (SSOT)

Every calculation followed a strict 5-layer architecture. Data flows one
direction only–from QuickBooks through the sync layer, stored raw in the
database, calculated in the API layer, and displayed in the frontend.

| 01	02	03	04	05
QuickBooks Source of Truth	**Sync Layer** ETL operations	**Database** 44 tables, raw data	**API Layer** 20 endpoints	**Frontend** Display only

The #1 Rule: Frontend NEVER Calculates

If the same number could exist in two places with two different values, the architecture
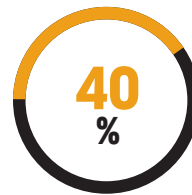failed. This separation eliminated reconciliation errors entirely.

THE RESULTS
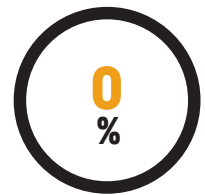## Time Recovered. Errors Eliminated.

The dashboard transformed operations from reactive firefighting to proactive management. Leadership could check cash position anytime—not just after Tuesday's manual report.
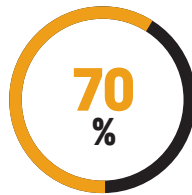
70%
Weekly reporting time reduced

40%
Reduced licensing fees for feature upgrades

0%
Data loss due to Human Error

Before: 25-30 hrs/week
1-2 hours
Weekly reporting time

Before: Weekly snapshots
Real-Time
Cash visibility

Before: Triple entry
One
Manual data entry

What $14M+ Operations Visibility Looks Like

12+	**5**	**$500K+**
Concurrent Projects	States of Active Projects	Outstanding AR Tracked
$1.1M+	**52 week**	**13 week**
Overhead Allocated	Historical Cashflow Trends	Forward Cash Projections

BUILT-IN BUSINESS LOGIC

The dashboard didn't just display data—it encoded operational priorities. A Priority-1 — Priority-4 payment system ensured payroll and taxes were always covered first, erection crews second (miss a payment, they walk off-site), vendors third. When cash runway exceeded target thresholds, the system automatically elevated vendor payments to clear outstanding balances.

"All from a single, secure, accurate dashboard, updated automatically every night."

BUILT BY ANDY SIMS
Director of Operations → Operations System Architect

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At the time, this platform wasn't built by a hired agency or outside consultant. It was built by the Director of Operations living the problem every day—while simultaneously managing operations for a $14M+ company.

With 20+ years of operations experience—including enterprise platform development tracking millions in sales—Andy understood that the challenge wasn't finding better software. The challenge was building software that fit how the business actually worked.

Contact us!

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Ready to build software that finally fits?
‹syncIO/› delivers custom operational software for growing businesses who've outgrown off-the-shelf solutions but can't afford enterprise pricing.

* Numbers and project names shown have been modified for demonstration purposes. Actual platform tracked $20M+ in active construction projects across multiple states.

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