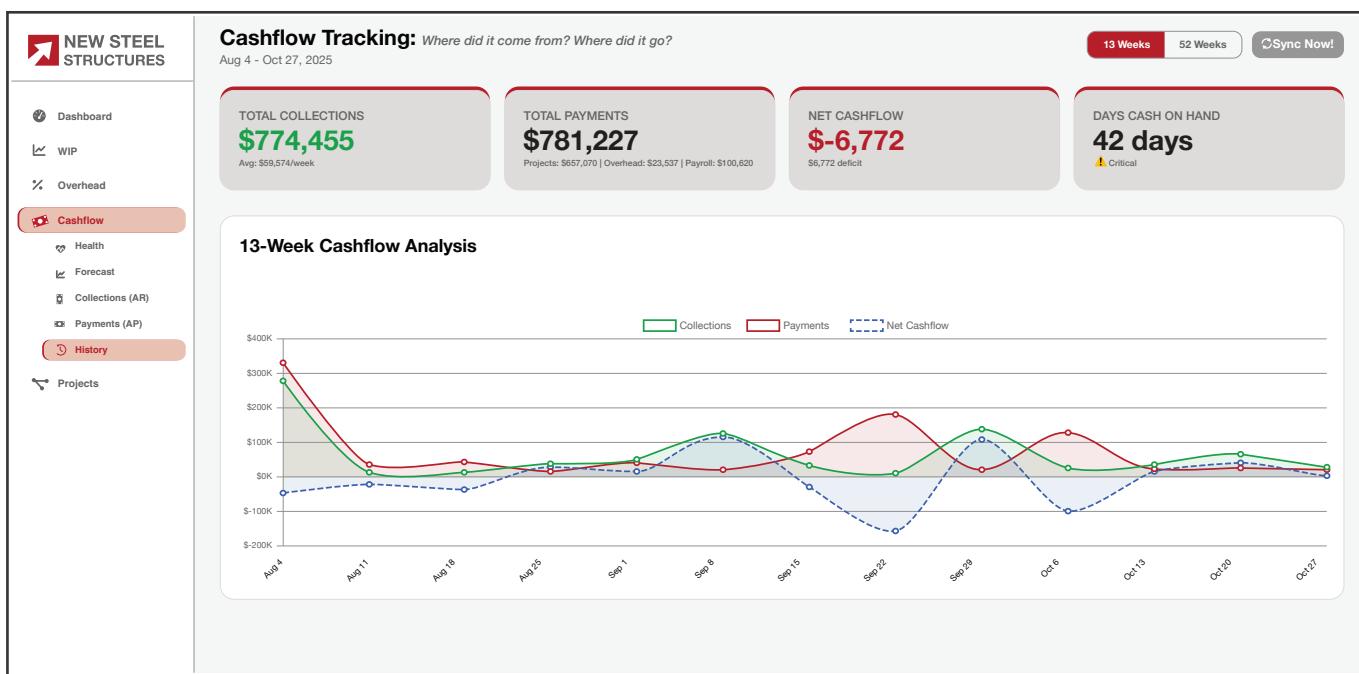


# CASE STUDY

## OPERATIONS DASHBOARD

From 25 Hours of Manual Reporting to Real-Time Visibility



## 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:

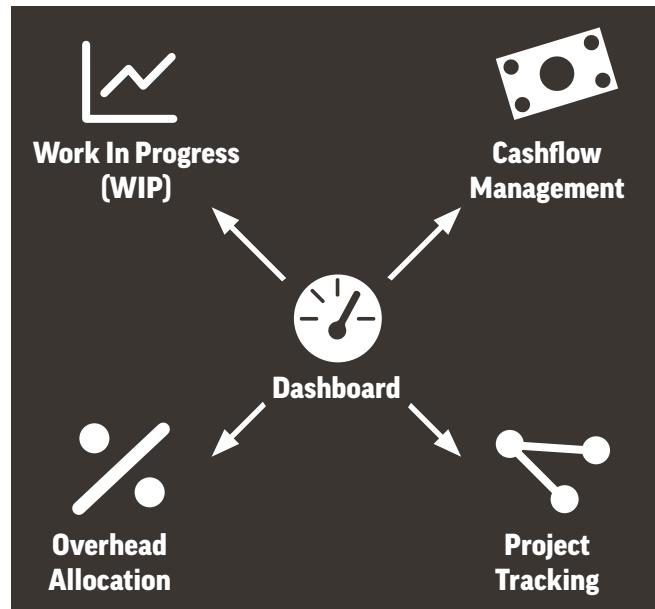
Transposing data across \$200K worth of bills and invoices was inevitably creating confusion as to what numbers can be trusted.

# 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.



## CORE PRINCIPLE

Integration, Not Replacement

**44**  
Database  
Tables

**20**  
API  
Endpoints

**3am**  
Daily  
Auto-Sync

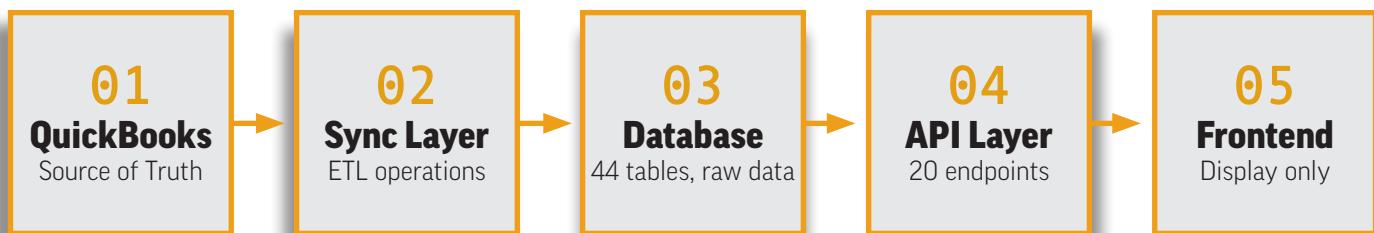
**5**  
Layer  
Architecture

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.



### 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.



Weekly reporting time reduced



Reduced licensing fees for feature upgrades



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+**

Concurrent Projects

**5**

States of Active Projects

**\$500K+**

Outstanding AR Tracked

**\$1.1M+**

Overhead Allocated

**52 week**

Historical Cashflow Trends

**13 week**

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

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.

<syncIO/> Labs



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### Ready to build software that finally fits?

<asimsjr/> 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.