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Steve Potts (right, with QSP Jason Weaver)
Accounting Services Manager, Rocktec

Rocktec Strikes Pay-dirt with New Accounting System

Rocktec is an engineering company specialising in the manufacture of quarrying and mining equipment, materials handling machinery and environmental waste solution products. Based in Matamata in the Waikato, Rocktec has a worldwide client base.

Because many projects are custom-built, with most in progress for several months or more, accurately costing and monitoring jobs is critical to Rocktec's success, but their previous accounting system had been letting them down. "We had spreadsheets all over the place," says Accounting Services Manager Steve Potts, "but we couldn't trust the information. Finally, our job costing just stopped working."

A move to Accredo Saturn in 2004 has completely turned things around at Rocktec. "We now have believable data," says Financial Controller Anne Brewster, "which is easy to follow, filter, sort and export." In addition, there are improved data entry efficiencies and a massive reduction in paperwork.

Accurate reporting leaves no stone unturned

"When we first looked at Accredo, we saw that we could get a lot more than we currently had at a reasonable cost," remarks Steve, "Other products would have been mind and budget bending for the same reporting functionality." Anne agrees. "Both in terms of implementation and ease of use, it's the best system I've worked with. Accredo has so much flexibility in terms of reporting, filtering and sorting; it's simple to use; and there was an easy migration path from our previous [Prophet] system."

One of the critical success factors of Rocktec's move to Accredo has been the ability to report accurately and quickly on any aspect of a job. Breaking down jobs into cost centres and components, which was not possible in their previous system, has given staff "much greater flexibility in reporting details or summary information

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as required," emphasises Steve. "We can show everything from the big picture of a whole job, right through to tasks done by individual employees or specific parts used on the job. I used to give the guys 20-page reports and their eyes would glaze over. Now I can hand them a one-page Accredo summary showing the information they actually want to know – actual versus quoted costs, labour and materials – for one job or a number of jobs."



Being able to manage the system... without having to constantly ask a 'systems' person for help is invaluable...

Anne Brewster (right, with QSP Jason Weaver) Financial Controller, Rocktec

Steve and Anne have both found Accredo's JC analysis reports especially valuable in managing costs for custom-made machinery. "It allows us to analyse jobs at a much earlier stage," says Anne, "which means we can make decisions about work in progress and solve problems as we go, rather than waiting until the job is finished and the damage is done."

Accredo turns mountains into molehills for users

One of the keys to a smooth transition to Accredo for Rocktec was the assistance of Accredo Qualified Support Person Jason Weaver of Zeal Systems in Tauranga. "Before and during

implementation, Jason put a lot of effort into analysing our business practices and helping us to ensure we were working effectively," says Anne, "and then setting up our system to accommodate those best practices." This included customising the Job entry screen to ensure all required data is added in the most efficient order.

The Rocktec team have been impressed at how easily they can customise the system themselves as well. All users can create their own customised reports very simply, which is "much more efficient than our previous system," says Anne, "where only one staff member understood JC reporting."

After attending an Accredo scripting course, Anne has also been able to write simple scripts in-house. She has added an on-save check to ensure the location is specified when goods are receipted, improving data entry accuracy. "This gives me greater control over what goes into the system, resulting in better information coming out," she says.

More user-friendly options give Rocktec the power to manage their own data without needing expert assistance – for example, Anne has tidied up duplicate records simply and safely using the Merge Codes function. "Being able to manage the system as a user without having to constantly ask a 'systems' person for help is invaluable in terms of time and cost savings," she says.

Rock triumphs over paper

In addition to the improved reporting power Rocktec has gained with Accredo, Steve has noticed a huge reduction in paperwork. "It's a single step to email reports as PDF or Excel files," he says. "I just email them to the relevant person electronically for approval, they reply with their OK and that is that." Because all historical information is stored in Accredo, and reports can be printed as at any period, the need to retain multiple hard copies of all paperwork (as was the practice with Rocktec's previous system) has also been eliminated. "We have really started to trust Accredo," says Steve, "It's reliable and has a good back-up system."

Easy access to information in Accredo also allows Steve and other staff to save in many other ways. When a new job is similar to a previous one, the purchasing officer can duplicate the purchase order from the previous job when ordering parts and materials – saving time and ensuring greater accuracy. Finding out how much a job cost four or five months ago is also simple, as all transactions for a job can be viewed within the job record. And Steve constantly benefits from the seamless interaction between Accredo modules. "Between Inventory Control and Job Costing I can find almost all my answers – it's a cure-all," he says.