



What's New

We are excited to announce our new partnership with Acumatica! After a two-year search process, we have selected Acumatica Construction Edition as an addition to our Construction-specific software offering. Megyn and Jacob already have some of their badges/certifications. We're hosting a three-part webinar to educate our construction friends on this new option, why we think it meets some specific needs for our clients, and what it looks like! Keep an eye out for updates.

Enjoy your Fourth of July celebrations. Stay safe — **it's hard** to work in construction or technology when you're missing fingers! - *Catherine Wendt*



Artificial Intelligence: Your Best Intern Ever!

Everywhere you look, every event we attend, every vendor update seems to include something about Artificial Intelligence (AI). Some of it sounds fluffy, like they have plans, but nothing is available yet. Others promise the world if you use their iteration or system! Chris suggested interviewing our teams and sharing some things they do with AI. We hope to inspire you and help get the creative juices flowing!

I met with Mariano on our Developer team. **He's been with us since early 2018, so he's been part of our AI journey for a while now. AI isn't new to this team.** The Devs have been using it mainly for coding for years. These tools are very helpful when writing and deploying code, as well as finding errors and checking results (testing). **In the last 18 months, they've found some 'favorite' tools and really honed in on** how and where to use them for the

most impact. Using the right tool makes all the difference. The really interesting part is how fast the use of AI has accelerated since Copilot became so readily available.

Internally, our Dev team has provided some pretty amazing solutions to help Syscon and our clients stay streamlined, standardized, and bullet proof. With our Daily Field Reports add-on for our FIT System, AI helped with the mock testing and the very time-consuming copy functions. With a little fine-tuning by the Devs to address small issues, the project was much more efficient (and fun). We use a ticketing system and our FIT System for time entries. The team was able to embed AI into our FIT System to generate alternative wording, find spelling errors, and similar. They even have a link back to the ticket, right from FIT!

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Our Business Applications (Biz Apps) team often uses AI tools to work through and build the framework based on the project or concept for a project. This outline process has made them much more efficient as they dig into the project. When you **ask Copilot to talk with you as if it's an expert**, the feedback and ideas are excellent. Sometimes we have more than one tool or path available for the project. Using AI allows this team to **efficiently think through the pro's and con's for both options**. When it comes to syntax, Copilot can handle as much as 90% of the draft, allowing our team to take it from there, **saving a lot of time (and drudgery)**. I've heard several of them turning to AI when they feel stuck with the code or project, and many times, the suggestions have helped spark how to move forward.

Everyone commented on using Copilot for internal meetings! These **provide great summaries and it's easy to return to the meeting to re-listen to a section**, or just ask Copilot specific questions about what was said. Copilot also follows our SharePoint secu-

rity rules, so our data is safe and secure.

Mariano feels the whole Dev team is more efficient using these tools. **They've taken the time to focus on repetitive tasks (their least favorite), figuring out which tool is best, then 'teaching' it what to do or look for.** By treating the AI tool as an intern or trainee, the Devs can delegate the boring tasks to their AI models, then, just like with a human intern, provide supervision and check the results. Since the AI tool is learning over time, its results get better and **better. I'll bet you can make a short list of repetitive tasks; which ones might be worth trying this on?**

Many of us are familiar with the amount of time it takes to keep procedures up-to-date, vendor lists, and **similar data that's been around a while. In the Development world, it's old libraries.** These are time-consuming to update. With Copilot, the Devs were able to find the necessary changes from the old to the new libraries. This kind of work would have taken a week just a few years ago. The last round of updates was

about six hours! With this kind of **time savings, they're able to do updates more frequently; a win for them and for our clients!**

It does feel like AI is moving very fast, faster than this team can stay ahead of. These tools seem like magic! Initially the Devs were skeptical. **They didn't think the tools could write code successfully.** After digging in and treating it like an intern or trainee, assigning the right tasks and providing the right direction, it really did feel like magic. When learning a magic trick, the first **couple of times you probably don't get it right.** But with repetition, you can be great; same here! - CMW

"You must be better than you were a year ago, just to stay even. That's the way the world really works."

— Dr. Nido Qubein

Conquer the Chaos By Clate Mask

The beginning of the book is a summary of the story of Keap, how it was started, and some of the struggles the original owners experienced as the company started off and grew. Like many businesses, there were exhilarating moments, there were crushing weights of concern, financial scares, and stress on families and friendships. Mr. Mask goes on to share their search for how to make the business a success without losing sight of the bigger picture, and while working to balance and grow a family.



The next sections are designed around some of the solutions they found. These are clearly a combination of a number of leaders in this space. Many of the Traction and Scaling Up concepts and even

Book Nook

worksheets are part of his formula to determine Vision, Mission, and Value, short term goals that roll up to one-year goals, which roll up to three-years, and so on. Other sections talk about concepts we hear from Darren Hardy, Patrick Lencioni, James Clear, the Arbinger Group, and Dave Ramsey.

It seems his audience is the smaller entrepreneur, which is in line with the more typical size of a Keap customer. He spends a lot of time convincing the reader of the need to look at these concepts. Other sections include the importance of Automation, a staple of the Keap CRM; Leadership skills; and Strategy. New and smaller companies would find encouragement.

A wrap up comment: 'Things will work out in the end. If it hasn't worked out yet, it isn't the end.' - CMW



Zelle Fraud Department Impersonation

Larry received a call saying they were with Chase Bank, providing a name and ID number. He was working with the Zelle Fraud Protection Department at the Chase Bank and gave an address in Phoenix. He then said that the caller ID number Larry could see was further proof he was calling from that branch.

Now to the heart of it—he said there were three suspicious transactions on my account in various dollar amounts sent from Larry's Chase Bank account. There were a couple of other non-specific questions, then he said he would call Zelle to cancel the transactions. He provided a special code for Larry to use. Larry was then transferred to another person. Larry hung up.

A couple of things: Larry doesn't have a Chase account; he doesn't use Zelle; the first person gave the code, then apologized and said he had misread it and corrected the last digits, explaining that the letter 'C' was a reference to canceling; caller ID's can be faked. Zelle and Chase are pretty big names used by tons of people. Don't engage in these calls. If you think there might be a real issue, hang up and call the vendor directly using phone numbers you already have! - CMW

Backups—Have you Tested?

Backups are important, but there are different 'flavors' of backups. Sometimes it's just a copy; sometimes it's a copy in a remote location; other times it's a backup disaster recovery solution with incremental moments in time (our

favorite!). A copy can be damaged or infected. A copy to a spare drive or device **can be damaged or can 'walk.'** A remote backup would have to be downloaded if it was needed.

We recommend testing your backups on some regular schedule. **If it's a copy, can you mount it and access it? If it's in a remote location, how long does it take to download it if you needed it, to what equipment, and will it run?**

Here's a good one: the latest crypto viruses are looking for backups so they can infect or destroy them. It's important that your backups are immutable, that they cannot be changed or deleted once they're written, taking this kind of attack off the table.

If the worst-case scenario happened to you, does your team know who to call? Has the recovery process been tested so everything is in place and you have all the credentials you need?

One of our clients had a virtual server (VM) **that we were backing up. It's a long story, but it turns out the Operating System (OS) was no longer on that VM partition, only the data. Without the OS, you can't access the data. We had the backups! Without leaving our office, we were able to recreate the server from the backup and restore it to their environment 800 miles away!**

In another example, the customer had backed up the data, but not the server. Turns out there was a hardware failure. We were able to replace the hardware, install the Operating System, then get all **the data from the customer's backup** using a bare metal restore. Four hours later, the customer was back up and running without data loss, all this after a total hardware failure.

With a disaster recovery plan, we were able to restore a client back to a pre-infection state. **The owner's computer had been hacked and was renaming and infecting anything it could 'see.'** We powered off the server, accessed the backups that were outside the network devices, and in less than two hours, restored to pre-infection state, and **cleaned the owner's computer!** - CMW

Shiny New Gadget Of The Month:



5 Device Charging Station with Cables

Quite a few families, or just couples with several devices, have decided to leave the devices in a basket during family dinner; love it! Or maybe you limit phones during specific meetings. Instead of a basket, what about this charger?

This device boasts four USB-A ports and one USB-C port to charge phones, tablets, and more, while keeping them neatly stored.

Included with the charging station is an AC Power Cord (5 ft), two Lightning to USB Cables (6 in), two Micro USB Cables (6 in), and one USB-C to USB Cable (6 in). The unit itself is 6.7" L x 4.9" W x 2.8" H, 1.01 lbs!

I could picture this coming along for a family vacation, too. A great way to power everything up while out on the boat, or just snoozing. Looks like it's around \$60 through Sharper Image, but there seem to be some promotions available, as well. - CMW



Construction Corner



Sage 100 Contractor News

New Release: Sage recently released version 27 of S100C. This is considered a Major revision sine the number sequence is going up to the left of the decimal. We usually like to give these major updates a little time before installing them for our clients— glad we did.

We received several calls. Turns out there was a bug related to the 7-2-2 User List security. The user would receive a Fatal Error warning! They have subsequently released an update **(a minor update) to fix this bug.** We'll keep an eye on this for a few more weeks, then start helping clients with upgrades.

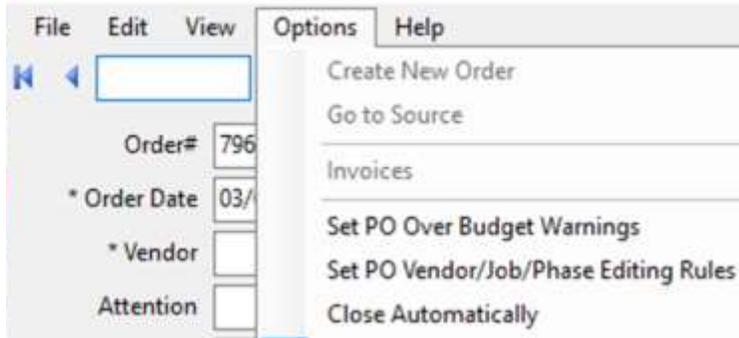
Certificates of Insurance: When you have subcontractors on your job sites, **it's very important to be sure they have Workers Compensation insurance and that you have a Certificate of Insurance from them.** If not, and someone on their team is injured, insurance will look to you to cover the event.

Data clean up: We use Parts quite heavily for our quotes and our billing. With so many Microsoft products, we accidentally had two parts for the same item. With our tools, we were able to find all the places where the **'extra' part had been used (PO's, Recurring AR, Quotes, Billing).** With this list in hand, our Biz Apps team was able to swap the part number in those identified records. That meant there were no records left with the **'extra' part and we were able to delete it;** nice and clean!

Purchase Order Corrections: A while back, Sage added the ability to change a Vendor, Job, and even Phase in a Purchase Order (6-6-1). **Although I'm not excited about this,** the feature is

very helpful when someone has just made a mistake selecting the job, or it turns out the PO is for a different phase, since all fields that are grayed-out once the PO is saved.

6-6-1 Purchase Orders | Syscon | sys-sage



When logged in with Admin rights, in the 6-6-1 screen, choose Options, then **'Set PO Vendor/Job/Phase Editing Rules.'** Select the criteria for Vendors and Jobs, then click OK.

“Turns out there was a bug related to the 7-2-2 User List security. The user would receive a Fatal Error warning!”

Retention: New Rules

It's not new to 2025, but there are new rules for reporting retention on Financial statements. From the many CPA's I've spoken with and the breakout sessions at the CFMA Annual conference, the CPA's have been pushing back on this ruling, but with no success. Many of us are seeing the results as we receive our 2024 CPA-prepared Financial reports.

There are many nuances, but I think we can summarize what this change is supposed to accomplish, and in **general, how it's put together.**

When you finalize your over/under

billing, work in progress, some jobs are underbilled (an asset) and some are overbilled (a liability—you owe **the work or a refund**). **It's also possible** that some of the underbilled work

includes retention, but since you **haven't billed it yet, that's a little misleading** when reviewing bank covenants and bonding reports. So the goal is to look at the underbilled jobs and determine

what portion of that number is actually retention. With that number in hand, the reported retention is lowered. This basically takes away the retention portion of the overbilling.

This changes the asset numbers and usually results in additional foot notes later in the financial statement. As Controllers and bookkeepers, be sure **to request the CPA's work papers** so you have a record of how they arrived at these numbers.

Last thought: for the internal financials, we are not booking these adjustments. These are financial presentation only, just like breaking out the retention asset, and do not need to be entered as an adjusting entry. - CMW

Wednesday July 23rd at 1:30pm Central time for our introductory webinar.
Acumatica:
What is it?

Introducing Acumatica

What is Acumatica?

For decades we've been focused on Sage 100 Contractor, a construction-specific accounting and project management solution. This is a great solution that has served, and continues to serve our clients' needs—but some needs are changing.



We've watched so many changes in technology over the years. The shift for ERP software is to move to browser-based solutions. There are some amazing 'wins' regarding access, visibility for the field, and more. There are some concerns, as well.

We've spent the last two years researching, demo'ing, and looking into the infrastructure that the construction-specific browser-based accounting AND project management solutions offer. We have selected Acumatica Construction edition and couldn't be more excited!



Not everyone is ready for this! Not everyone needs this! And what is 'this' anyway? We're hosting a three-part webinar series to share more about Acumatica Construction, what it is, some of the features, and how this type of solution works. We encourage all of our construction clients to get educated—this might be an option for your one-year road map, three-year, or maybe ten-year planning!

On Wednesday July 23rd at 1:30 pm Central time, join us for the first in our three-part webinar series. We'll share the changing technology for ERP software; the reason we spent two years researching the options; the amazing 'wins' with this new platform; visibility for the field; and more! We'll also take a look at the Acumatica Construction software for an introductory tour.

We're thrilled to announce our new Value Added Reseller status with Acumatica, the leading provider of Cloud ERP solutions. This partnership marks a significant milestone in our mission to empower construction owners with technology solutions that drive efficiency, productivity, and success. We're excited to join the Acumatica reseller community and Ecosystem. Please join us this summer and fall to hear more about this solution.



Partner

How Did They Do It? Cooper General Contractors

Turns out agriculture and construction have a few things in common according to William Switzer, CFO, CIO, and Partner at CGC. As a fifth-generation farmer in northeast Texas, William grew up in the family business. After harvest time, he would head back to Iowa to help the family farm. **Whether it's planting seeds in the ground or digging a construction foundation, you can watch it 'grow,' both having a beginning, middle, and end. However, farming wasn't a future, it was more of a past for William.**

Having several roles in construction companies, William had an opportunity to help a VC build a big company, very high level and strategic work. Although the work was a great adventure, William wanted the visible outcome construction brings.

William was really looking for a leader that would help align personal and professional goals, balancing family as well. Joe Flores purchased CGC in 2023 and is the company president, giving William a chance for partnership. William admires Joe personally and professionally, his trust, and willingness to invest in William personally.

One of the biggest challenges in the last year was the process of replacing the management team! The company was founded and operated for over 20 years, then Joe purchased it and made changes. Change can be hard, and staffing changes take time.



William Switzer
CFO, CIO

William's favorite Syscon resource is the FIT System! He calls it a 'revolution for efficiency' since it is fully integrated with Sage 100 Contractor. William feels it's the perfect balance between modern API products and SQL Server for time entry and receipt submission. He found Syscon through a random internet search and shared that he greatly admires what we are doing for our clients, adding that our products 'kick-ass!' *CMW*

Fast Facts
 Founded: 2000
 Specialty: **General Contractor, Texas**
 Affiliations: Certified minority owned business, national; HUB Certification

Read more at www.syscon-inc.com/how-did-they-do-it

Are you interested in having your story featured? Let's talk!

Upcoming Events

Event: Ditch Paper Timecards!, webinar

Date: Thursday, July 10th

Time: 11 a.m. CST

Register: www.syscon-inc.com/events

Event: Acumatica Construction Edition: What is it? webinar

Date: Wednesday, July 23rd

Time: 1:30 p.m. CST

Register: www.syscon-inc.com/events



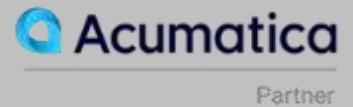
Take Note:

Syscon will be closed Friday, July 4th

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Proud Partners



We love this stuff!
 We are committed to helping businesses use technology to run their organization successfully and profitably.

This monthly publication provided courtesy of Catherine Wendt, President of Syscon Inc.

