Acumatica
The Cloud ERP

# Acumatica Role-Based ERP Software for the Construction Industry

## Empower Construction Business Leaders with Role-Based Dashboards and Real-Time Data

Legacy ERP systems can be complicated and awkward to use. Employees struggle to get the information required to make decisions, spot trends, or react to issues as they arise. Construction leaders must access siloed systems with outdated reports to manage daily activities and create long-term strategic goals.

There is a better way. Modern ERP applications like Acumatica Construction Edition provide a holistic view of the entire business from a single, connected platform. Empower construction executives with role-based dashboards to strategically monitor the information they need to manage their area of expertise. Enable employees with configurable workflows that suit your organization's unique needs. Use personalization to remove clutter from screens to focus on critical tasks that drive growth, reduce costs, improve quality, and increase profits with an extraordinary experience for customers and employees.

This solution brief shows how construction companies can align information and workflows to drive significant improvements throughout every area of project management from the boardroom to the job site to the back-office team.





INTRODUCTION

# Streamline Construction Projects with a Modern ERP Platform

Built on an adaptable platform with Open APIs for rapid integration, Acumatica Construction Edition is designed for the way construction professionals operate today and into the future. Its flexible architecture allows for low-code or no-code customization and added capabilities, such as data visualization, artificial intelligence, and machine learning. All construction processes share the same data, information is available anytime, anywhere, and everything revolves around the project and the customer.

"With Acumatica, we're able to just click a button and now we can see all of our financials by branch or just consolidated with one click of a button."

**– AASHA CUNNINGHAM, DIRECTOR OF ACCOUNTING AND ADMINISTRATION, PHOENIX RENOVATION & RESTORATION, INC.**

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## CONSTRUCTION FINANCIALS



Acumatica's certified payroll and native AIA billing and reporting help to speed up invoicing and payment. Natively configure tax requirements and manage retainage.

## CHANGE MANAGEMENT



Set up change order workflows and manage status throughout the project's lifecycle. Enable RFI workflows and use them to create change requests.

## COMPLIANCE & SAFETY



Set up automation to alert construction leaders when compliance and safety documents need attention. Avoid project delays with a central location for all documentation.

## DAILY FIELD REPORTS



Collaborate between field and office with Acumatica's mobile app for field reports, photo logs, submittals, change requests, progress worksheets, expenses, and more.

## BUSINESS INTELLIGENCE (BI)



Acumatica's BI and analytics give construction leaders visibility into each project's profitability. Deliver financial insights and control expenses with agility for faster decision-making.

## COLLABORATION TOOLS & SELF-SERVICE PORTALS



Extend Acumatica features to vendors, subcontractors, and customers with no added user license fees. Set up customers with secure online access to account details.

## REMOTE TIME MANAGEMENT



Capture employee time for payroll, human resources, and expenses for field service, project accounting, and other construction activities.

## ROLE-BASED SECURITY



Control access to menus, screens, and fields specific to each construction department's needs. Set up role-specific dashboards for improved job performance and efficiency.

## WIKIS AND DOCUMENTATION



Create a knowledge base of business practices, construction procedures, and tips using built-in wikis to empower employees.

## ACUMATICA UNIVERSITY



Acumatica's Open University is a free internet portal with educational resources for everyone interested in Acumatica product offerings and technology.

# Construction Executives



The C-level business leaders in a construction company depend on business intelligence and analytics to make better decisions. Enjoy full visibility to set financial goals and analyze budgets. Oversee capital asset plans and accurately forecast future growth opportunities.



## CFO/CONTROLLER

The titles CFO and Controller must have access to all company financial, project, and KPI data at their fingertips. Acumatica's analytics and personalized dashboards empower CFOs to identify economic trends and react with agility. Use the mobile app to monitor finances from anywhere, anytime.



## CHIEF OPERATING OFFICER

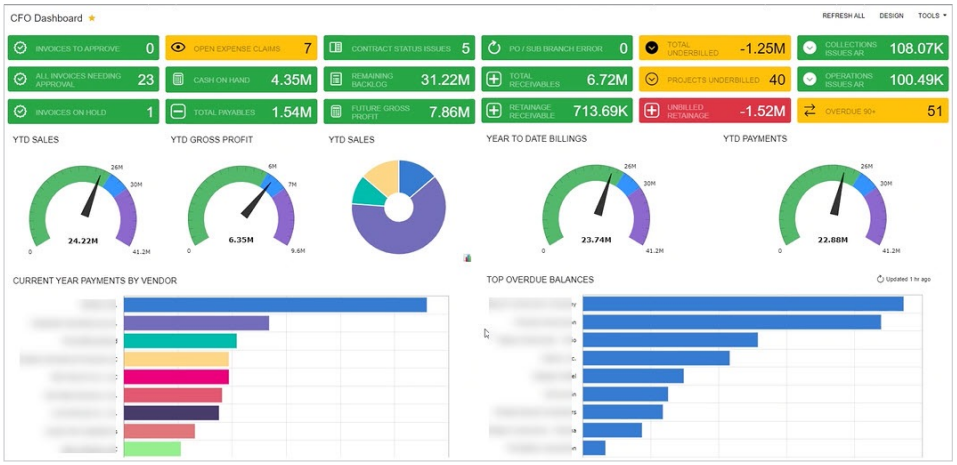
The Chief Operating Officer oversees daily construction operations and works closely with the CFO and Controller on leadership initiatives. COOs use Acumatica to eliminate errors and manual tasks with automated, integrated construction process workflows. Use analytics to monitor teams on the job site and implement business procedures to increase efficiency.



## CEO/PRESIDENT

The construction CEO and President use Acumatica's configurable sales workflows to uncover new opportunities. Using Acumatica's holistic cloud platform, this construction executive can control costs and keep infrastructure expenses at a minimum. Unify and secure company data with role-based access and advanced authentication.

*Chief financial officers rely on customizable dashboards to drill down into company financial data. The decisions they make will affect profits and position the business as a competitive force for growth.*




"When we add a new company, we don't have to buy extra software licenses. We just create a new branch in Acumatica and quickly integrate them into Dukathole Group."

**– GRAHAM LEONARD, CHIEF FINANCIAL OFFICER & OPERATIONS MANAGER DUKATHOLE GROUP**

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# Construction Job Site Operations



Construction executives need a responsible team leading the operations at each job site. These include the foreman or project manager, project engineer, safety and compliance manager, and field services lead. Their job is to ensure the construction project proceeds on time and within budget. Acumatica Construction Edition provides real-time collaboration from field to office and office to field for effective and efficient construction job site management.



### PROJECT MANAGER

Project managers rely on role-based dashboards to track job costs, change orders, budgets, and contracts. Collaborate between field and office with Acumatica's mobile app for field reports, photos, submittals, change requests, progress worksheets, expenses, and more.



### PROJECT ENGINEER

Collaborate easily with a central location for contract details. Work closely with the project owner and project manager to ensure your construction job is safe, on schedule, and meets the owner's requirements.



### FIELD SERVICES MANAGER

Access account information to improve customer communication. Update service schedules, assign appointments, make changes, and track travel time. Plan and track service call inventory and equipment from anywhere.



### SAFETY AND COMPLIANCE

Set alarms and expirations for pending insurance certificates. Effectively manage lien waivers to give all parties complete project transparency. Organize, track, and send payments and documents electronically to save time and money.

# Job Site Operations: Support



Construction project support teams typically perform their jobs in an office setting. But in their support roles, the architect, equipment manager, estimating lead, and procurement manager will visit the job site to check progress. With a connected system like Acumatica, project data is available in real-time, saving time and eliminating time-consuming visits to the job site.



### EQUIPMENT MANAGERS

Acumatica Construction Edition connects people no matter where they are working. Equipment managers schedule, dispatch, and maintain equipment with automated alerts and workflows. They need real-time access to inventory in multiple locations to coordinate the supplies on each job site. Equipment managers also coordinate with safety and compliance to handle equipment maintenance schedules and documentation.



### ARCHITECTURAL SERVICES

Create building plans that incorporate your client's needs and ensure project success. Use role-based dashboards to ensure the job progresses according to the original design. Integrate the cost of RFIs and changes without unforeseen delays in the project's timeline.



### ESTIMATING

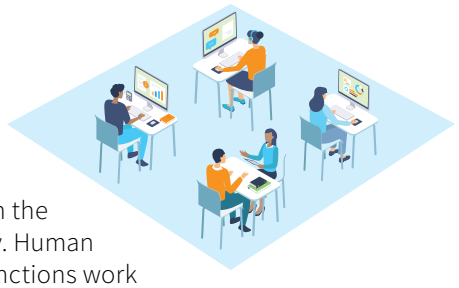
With updates to material prices adjusted in real-time, accurate and comprehensive estimates win more jobs. Acumatica empowers estimators to see RFIs, drawing logs, and change orders to understand how they affect the overall project budget. Collaborate with purchasing and equipment managers to monitor prices in real time.



### PURCHASING & PROCUREMENT

Facilitate the purchase and delivery of materials needed on the job site. Give all parties a view of the project inventory using Acumatica's powerful reporting tools. Create purchase orders to dropship inventory from the vendor to the job site.

# Back-Office Operations



From the company's controller to project accounting to human resources to service dispatchers, the construction staff who work in a traditional office setting provide a wide range of support for the project. These people rely on a steady flow of real-time data from the job site. Accounting teams need project updates to manage accounts payable proactively. Human resources should always have access to staffing and compliance needs. All back-office functions work behind the scenes to keep multiple projects on time and within budget.



## PROJECT ACCOUNTING

Finance staff supports construction operations by using dashboards to monitor data and analyze budgets with an eye on the company's overall financial health. Acumatica's robust financial features give construction accountants the tools to manage all processes natively. The CFMA Benchmarker tool in Acumatica helps compare the company's performance against peers in the industry and identify areas for improvement.



## SERVICE DISPATCHERS

Acumatica empowers service dispatchers with a complete view of customer accounts. View invoices, statements, support contracts, notes, and prior communication activities. Easily schedule and dispatch field service appointments. Create and assign tasks with built-in notifications and configurable approvals workflow. With Acumatica, customer support teams deliver unparalleled services to retain and grow customer relationships.



## ACCOUNTING

The staff accountants collaborate with the CFO, Controller, and the Project Accounting team to manage the overall company finances. Acumatica's robust financials and comprehensive certified payroll features allow construction accountants to perform their jobs more efficiently.



## HUMAN RESOURCES

Give HR the tools to recruit qualified personnel with Acumatica's centralized platform. Hire and retain employees with a system that is collaborative and easy to use. Manage employee skills assessments, certifications, and training requirements.

**CUSTOMER**
Views account information via the self-service portal and submits a service request.



**DISPATCHER**
Views and responds to customer needs and schedules technician appointments.



**TECHNICIAN**
Gets appointment details from the field, arrives with the tools and equipment needed, and documents service details.




# Discover Why Construction Leaders Rely on Acumatica for Their Success

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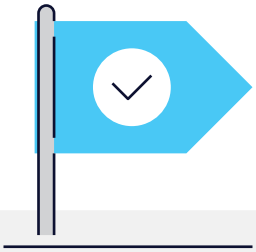
# Empower Construction Teams with a Powerful Role-Based ERP Application

Construction businesses still using legacy ERP solutions struggle with disconnected systems and manual processes. Data silos and disjointed workflows create barriers to growth, limiting executives from effectively managing their construction operations.

Acumatica Construction Edition provides business leaders with real-time company data from anywhere, anytime, on any device. Empower them to prioritize issues, take strategic actions, manage operations, and improve workflows. View project profitability to improve construction workflows and gain a competitive edge.

Give teams on the job site tools to seamlessly collaborate with vendors, subcontractors, office staff, and service teams. Empower job site support staff to oversee each project's budget with complete construction ERP application. Seamlessly manage construction payroll, compliance documentation, project materials, and equipment from one central location.

Acumatica provides the best construction industry solution to transform your company and thrive in today's digital economy. Built on a native cloud platform with an open architecture for modern technologies, rapid integrations, scalability, and ease of use, Acumatica Construction Edition delivers unparalleled value to small and mid-market businesses.



"Any robust accounting package has hundreds of functions, but everyone isn't an accountant. In Acumatica, you can filter but also hide the information you don't use every day. You can favorite items and build new favorites every day."

– SHEL WAGGENER
PRESIDENT
AMERICAN ASPHALT REPAIR & RESURFACING

Acumatica
The Cloud ERP

**Acumatica Cloud ERP is a comprehensive business management solution that was born in the cloud and built for more connected, collaborative ways of working. Designed explicitly to enable small and mid-market companies to thrive in today's digital economy, Acumatica's flexible solution, customer-friendly business practices, and industry-specific functionality help growing businesses adapt to fast-moving markets and take control of their future.**

**For more information on Acumatica, visit www.acumatica.com or follow us on LinkedIn.**