

Acumatica Role-Based ERP Software for the Construction Industry

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

Enterprise Resource Planning (ERP) Systems are complicated. Disconnected data and manual entry result in untimely and inaccurate information. 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 Construction leaders must access siloed systems with outdated reports to manage daily activities and create long-term strategic goals.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. Empower 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 eBook explores the modern-day world of construction ERP applications like Acumatica. It shows how the construction industry can align information and workflows to drive significant improvements throughout every area of project and back-office operations.





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 customer and the project.

“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 decisions. The CFO must view company revenue, budgets, and profitability metrics. The COO must regularly pull reports for construction project success levels, material pricing, and field service data to compare to forecasted timelines. Customized dashboards help the CEO accelerate decision-making with real-time insights into the project pipeline to stay ahead of the competition with agility and speed.

ROLES AND RESPONSIBILITIES

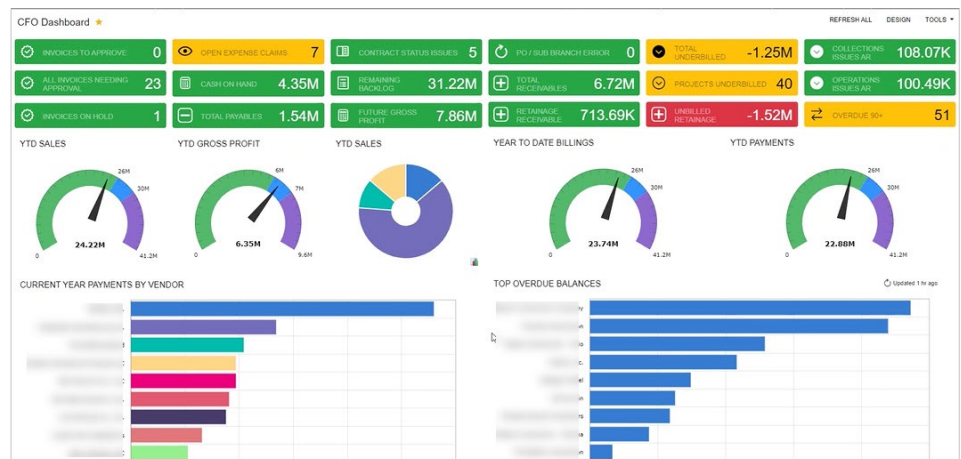
- Drive company revenue and profitability
- Set financial goals and analyze construction budgets
- Oversee capital asset plans and forecasts
- Maintain accountability to shareholders and board members
- Manage key partnerships with CPAs, banks, lenders, and lessors
- Implement best-in-class business systems and processes
- Manage corporate operations and collaborate with other executive leadership
- Foster a positive and ethical corporate culture
- Oversee competitive positioning
- Serve as the company's face to the public



ACUMATICA FOR THE CFO/CONTROLLER

The titles CFO and Controller are used interchangeably, depending on the size of the construction firm. They must have access to all company financial, project, and KPI data at their fingertips. Control costs with robust financial management, budgeting, and total spending and cash flow transparency. 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 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.



“Acumatica’s job costing abilities and controls, along with the ability to provide flexibility of modules to us as we grew, were huge selling aspects for us.”

– JAY FEINMAN, CFO, TESTER CONSTRUCTION GROUP

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ACUMATICA FOR THE CEO/PRESIDENT

Smaller construction companies may have a president instead of a CEO. Either or both roles are traditionally the highest-ranking executives at the firm. They make strategic decisions that impact company growth and may or may not be involved in day-to-day functions. 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.



ACUMATICA FOR THE COO

The Chief Operating Officer oversees daily construction operations and works closely with the CFO and Controller on leadership initiatives. As the highest-ranking operations role, the COO must oversee departmental managers. 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. Connect field teams with construction support roles and office staff in one centralized platform.

“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 EXECUTIVES USE ACUMATICA TO:

CONNECT DATA AND TEAMS

Connect all construction company data in a single database to provide a 360-degree view of every business area. Dashboards present comprehensive financial and operational data, enabling better and faster decisions.

CONTROL IT AND APPLICATION COSTS

Eliminate infrastructure, maintenance, and administration costs with a holistic cloud business platform with unlimited user licenses. Open APIs and low-code or no-code tools facilitate rapid integrations.

TRACK METRICS FOR GROWTH

Uncover new growth opportunities and improve win rates with configurable sales workflows and automated data capture. Track key metrics for accurate forecasting.

GAIN REPORTING TRANSPARENCY

Transform BI into real-time reports to manage job costs, payroll, profits, cash flow, and change management.

RESOLVE ISSUES FASTER

Automated project commitments, change order tracking, and issue alerts resolve client, vendor, and job site problems.

STREAMLINE DECISION-MAKING

Reduce repetitive tasks and avoid manual errors to make more strategic business decisions and accurately forecast industry trends.

MEASURE RESULTS AGAINST PEERS

Submit preconfigured Acumatica financial data for inclusion in the CFMA Benchmark survey and compare company results with industry peers.

GENERATE EMPLOYEE LOYALTY

Attract and retain qualified staff with an intuitive application that empowers them to do their jobs effectively. Empower remote workers with robust mobile applications.



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.

ROLES AND RESPONSIBILITIES

- Supervise daily project activities
- Collaborate with company leaders on timelines and metrics
- Monitor operational budgets
- Work with HR to fill open positions
- Oversee compliance and safety standards
- Maintain scope of work and approve change orders
- Oversee customer and vendor relationships
- Manage subcontractor crews on the job site
- Approve time for employees on the job site
- May assume purchasing and procurement responsibilities



ACUMATICA FOR PROJECT MANAGERS

Project managers rely on role-based dashboards to track job costs, change orders, budgets, and contracts. Harness the power of Acumatica Construction Edition to stay informed about what is happening across the organization with real-time data and automated notifications. Seamlessly collaborate between field and office with Acumatica's mobile app for field reports, photos, submittals, change requests, progress worksheets, expenses, and more. Manage materials from warehouse to job site with inventory visibility from anywhere. Improve customer communication with CRM for automated project updates and a self-service portal.

Operations leaders need quick access to project data. Acumatica's comprehensive Daily Field Report has information covering every detail that occurs on the job site.

DAILY FIELD REPORT		Company	Freemont Cooling	Page	1 of 4
Project	The Beach Hotel	Example	11/2/2022	User	Maxwell Baker
Date of DFR	Example	11/2/2022	Wednesday	Date	11:10 AM
Day	Wednesday	11/2/2022	Wednesday		
Project Manager	KONLEB@CRM				
WEATHER		Time	Cloudiness	Sky	Temp
		6:19 PM	15	Few	Clouds
LABOR TIME & ACTIVITIES		Employee			
		GIMMETHANN, Hanna Gimmel			
		SANCHEZALE, Alex Sanchez			
		GIMMETHANN, Hanna Gimmel			
CHANGE REQUESTS		Reference Nbr.	Change Date		
		00003	3/9/2021		
		00012	7/20/2022		
CHANGE ORDERS		Reference Nbr.	Class		
		00005	EXTERNAL		
		00017	EXTERNAL		
SUBCONTRACTORS		Vendor	Vendor Name	Proj	
		ELITECH@VIA	Elite Drywall	09	
		FIRENATCO	Fire National	10	
		SUNTECH	Suntech	03	
		10-620	1	6:00 AM	11:00 AM
		03-309	3	6:00 AM	12:00 PM
				06:00	05:00
				05:00	18:00
				SPECIALTIES	admin-Maxwell Baker
				CONCRETE	admin-Maxwell Baker
					8/10/2020 11:16 AM
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“Acumatica is real-time accounting for the project itself. It lets the project managers know where they’re at from a financial standpoint to help make decisions.”

– JEREMY STURGEON, DIRECTOR OF OPERATIONS, SPOHN ASSOCIATES, INC.

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JOB SITE OPERATIONS LEADERS USE ACUMATICA TO:

INCREASE CUSTOMER AWARENESS

Access critical customer information regarding RFIs, project issues, change orders, budgets, and cost codes to save time and keeps projects on schedule and budget.

FASTER ISSUE RESOLUTION

Automated project commitments, change order tracking, and issue alerts quickly resolve client, vendor, and job site problems.

ENSURE PROJECT PROGRESS

Built-in drop shipping allows needed supplies and equipment to be sent directly to the job site, preventing work stoppages and delays.

GUARANTEE PROJECT COMPLIANCE

Set up alerts to notify leaders when safety and compliance documentation is nearing expiration. Electronically store all documents to prove adherence to regulations easily.

STREAMLINE SUBCONTRACTOR MANAGEMENT

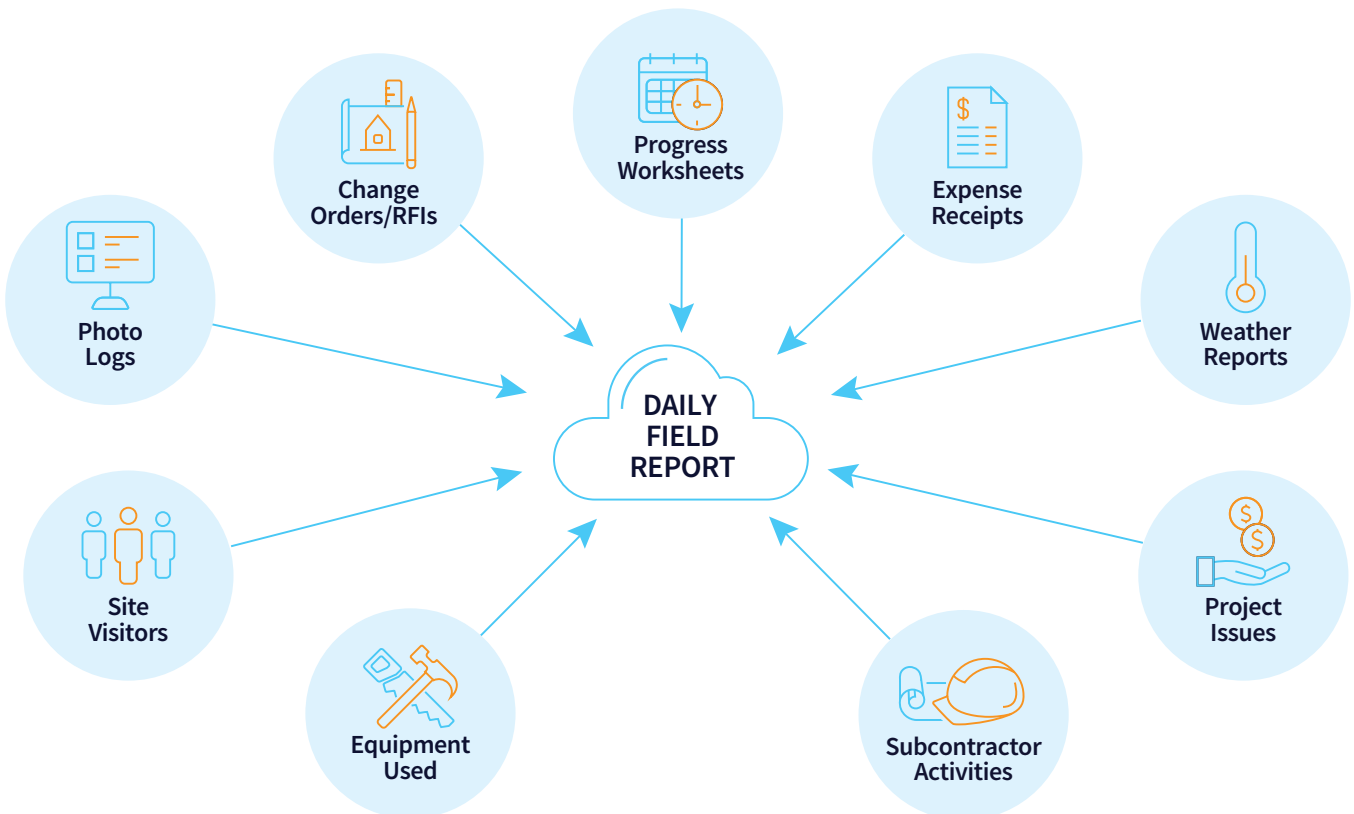
Communicate project and compliance needs with all job site crews with one central location for all information.

EXPEDITE OPERATIONS WITH MOBILITY

Give field staff the ability to record time with any mobile device. Transmit hours worked, expense receipts, and equipment used remotely.

EMPOWER FIELD TEAMS WITH DAILY FIELD REPORTS

Acumatica provides real-time visibility into each project with comprehensive daily field reports. Project managers can easily submit daily field report data on any mobile device. The reports include pertinent project details such as:





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.

ROLES AND RESPONSIBILITIES

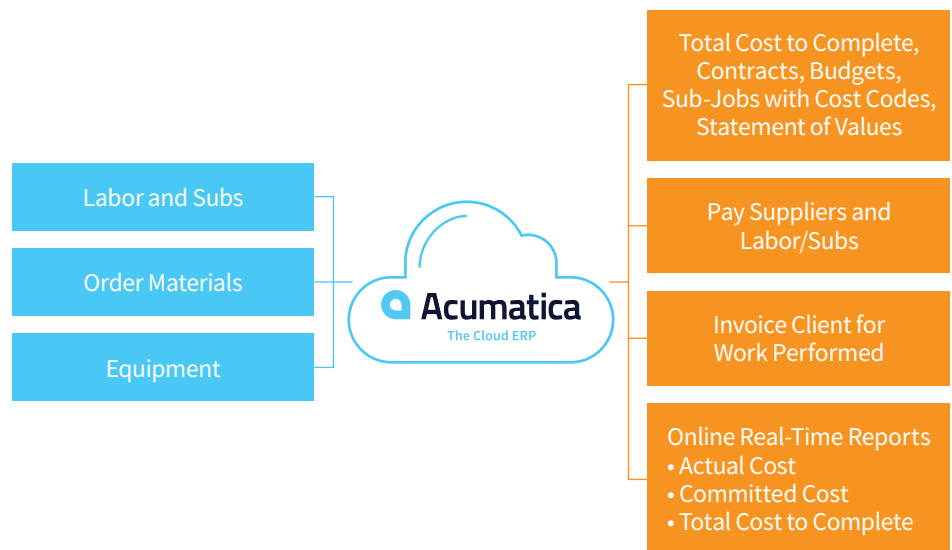
- Prepare preliminary designs according to the client’s parameters and budget
- Assist with contract preparations and bid evaluations
- Solicit supplier bids and proposals for labor, materials, and equipment
- Ensure proposals meet specifications and budget requirements
- Maintain and schedule all materials and services needed on the job site
- Oversee the day-to-day scheduling and management of materials and equipment



ACUMATICA FOR 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.

Manage subcontractor labor, materials, and equipment from anywhere. Pull reports with real-time project data.



“One of the first things we implemented was having our field staff go into Acumatica and enter cost projections. I couldn’t put a number on it, but it’s many, many hours a week in savings.”

– BILL AGEE, CHIEF FINANCIAL OFFICER, LIFECYCLE CONSTRUCTION SERVICES

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SUPPORT TEAMS USE ACUMATICA TO:

MANAGE PROJECTS FROM ANYWHERE

Remotely manage all project details and track activities happening on the job site. Get instant project data with instant field updates for complete visibility.

GAIN JOB COSTING EFFICIENCIES

Capture labor, material, and equipment costs from any device. Give project management real-time updates on how these cost changes affect the bottom line.

LINK CONTRACTS AND CHANGE ORDERS

Easily pull contract details within the project plan. View the change requests and change orders linked to the contract.

CONTROL INVENTORY AND STOCK

Seamlessly control construction inventory across job sites, warehouses, and mobile service vehicles.

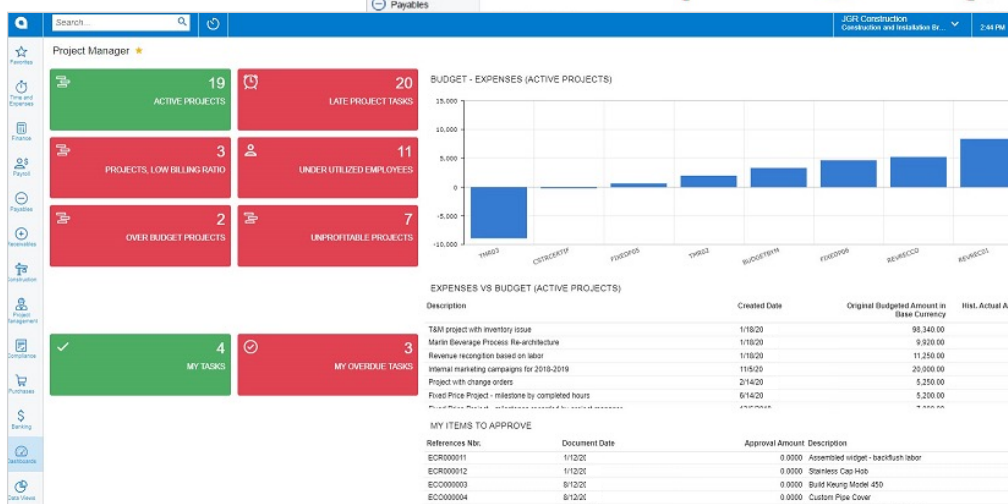
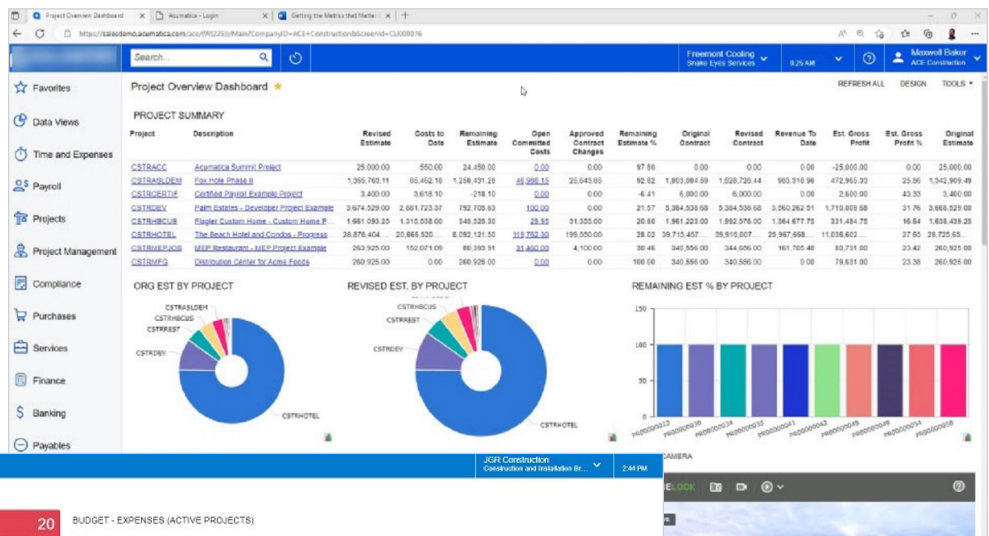
EMPOWER FIELD TEAMS

Capture project issues and change requests from the field. Give crews the ability to submit time and expenses using the Acumatica mobile app.

CUSTOMIZE WITHOUT CODING

Pre-configured reports in Acumatica give users the ability to customize without coding. Generate generic inquiries and business events to monitor the system for anomalies.

Build custom dashboards to measure project costs compared to projected budgets. Measure how change orders affect the original contract estimates and the customer's objectives.



“With Acumatica, I’m giving employees an ultra-efficient tool they need to do their jobs correctly, allowing them to do things easier.”

– MATTHEW SHAMP, EXECUTIVE DIRECTOR, CARLSON LAVINE INC.

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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.

ROLES AND RESPONSIBILITIES

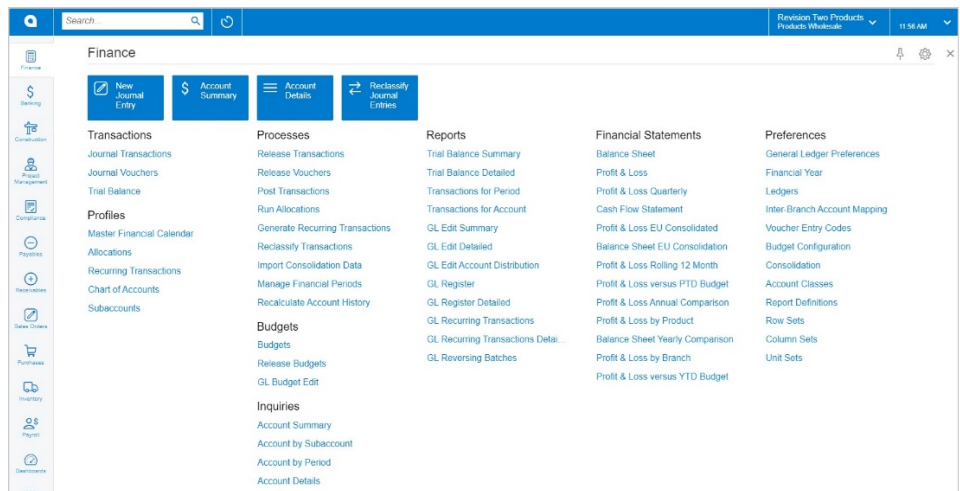
- Oversee accounts payable records
- Manage construction project accounting
- Perform revenue recognition
- Manage month-end and year-end closing
- Set up currencies and tax standards
- Manage certified, union, state, and local payroll
- Configure General Ledger allocations
- Generate pro-forma invoices
- Analyze estimates versus actual project costs
- Facilitate communications with vendors and subcontractors
- Recruit and hire qualified staff



ACUMATICA FOR 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.

Configure and customize financial reports to quickly drill down into bank balances, sales numbers, and other important financial metrics.



“Knowing that we are on a platform that is going to take us well into the future, I feel comfortable that we can invest and rely and build on Acumatica.”

– CASSANDRA MOORE, DIRECTOR OF FINANCE AND ACCOUNTING
ALPHA INSULATION & WATERPROOFING

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BACK-OFFICE TEAMS USE ACUMATICA TO:

GAIN COMPLETE FINANCIAL MANAGEMENT

Manage all financial and accounting documents under one umbrella. Multi-company, multicurrency, inter-company accounting, fixed assets, recurring and deferred revenue, and cash management are also available.

MASTER JOB COSTING

Seamless customer billing, driven by real-time project costing, includes up-to-date labor, material, and equipment costs. Easily manage AP workflows, from entering an invoice through approval routing and checks.

NATIVELY RUN CONSTRUCTION PAYROLL

Acumatica natively supports AIA billing and reporting. The flexible payroll solution also supports multiple unions, locals, classes, benefits packages, complex wages, certified wages, executive compensation, and commission structures.

CONTROL COMMITMENTS

Automatically calculate budgeted quantity against projected costs. Create purchase orders, budget comparisons, line-item committed costs, and payments.

TRACK PROGRESS BILLING

Flexible progress billing by the percentage of completion or by quantity, like linear or square footage, reduces project owner risk.

MANAGE SAFETY AND TRAINING

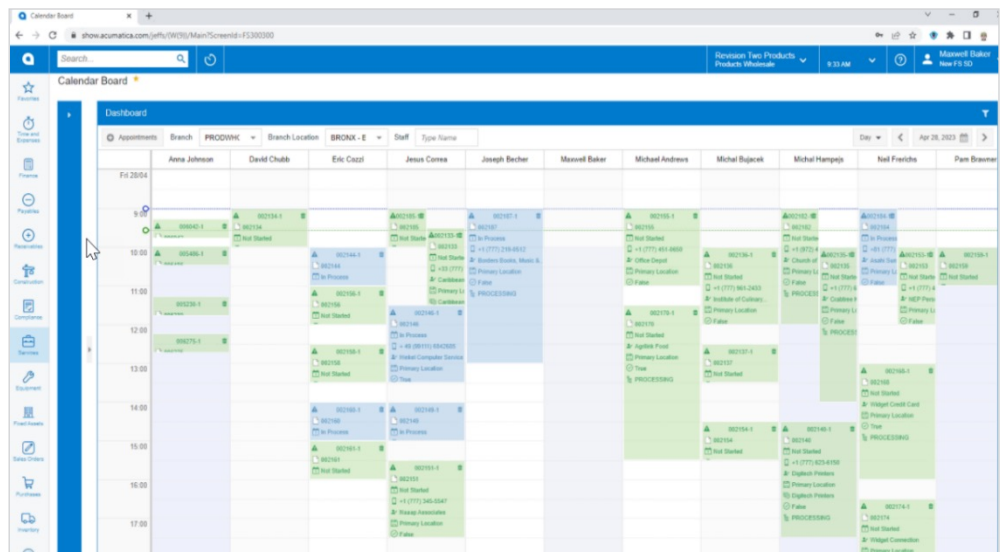
Create forms and documents within the system to record employee training and occurrence logs for use on the job site. Quickly view employee records from the office to stay on top of regulations.



ACUMATICA FOR 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.

Give service dispatchers the power to schedule technicians based on availability, location, inventory, and skill level.



“Having opportunities in CRM gives us the visibility into the sales project pipeline where we can see in real-time what’s close to closing as well as what’s in the pipeline.”

– JAMIE VOS, OWNER/GENERAL MANAGER, SECURITY SOLUTIONS NW

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SERVICE TEAMS USE ACUMATICA TO:

CREATE SERVICE APPOINTMENTS

View resource schedules by day, week, or month and filter calendars based on appointment requirements.

SCHEDULE RESOURCES

Schedule technicians based on workload, location, skill, or certification. Ensure technicians have the right equipment to complete the job.

AUTOMATE MOBILE UPDATES

Access customer history and capture payments and signatures remotely. Allow technicians to enter expense receipts and receive appointment updates from anywhere.

FOSTER COLLABORATION

Share information with staff to unify sales and service for an unparalleled customer experience.

CONVERT OPPORTUNITIES

Convert CRM opportunities into service orders and create service appointments from projects. Allocate stock items to service orders and generate purchase orders.

STRENGTHEN RELATIONSHIPS

Empower customers with access to account information, support cases, and updates through the online self-service portal. Give customers service-related updates via the portal.

“We have a workforce hungry for KPIs and metrics and Acumatica provides our employees and upper management with actionable data at their fingertips.”

– REBECCA OGLE, CHIEF FINANCIAL OFFICER, SAFETY MANAGEMENT GROUP

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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.



Other Construction Roles

Every role in the construction project plays a vital part in the project's success. Acumatica Construction Edition provides a centralized platform to connect employees and workflows across departments. Connected and native applications offer a comprehensive solution for the project engineer, the safety and compliance manager, the field services manager, human resources, architectural services, estimating, and procurement.

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.



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.



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.



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.



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.



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.



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.



Discover Why Construction Leaders Rely on Acumatica for Their Success

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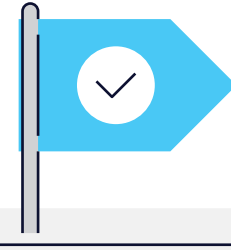
Empower Construction Teams with a Powerful Role-Based ERP Application

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

ABOUT ACUMATICA

Acumatica Cloud ERP provides the best business management solution for digitally resilient companies. Built for mobile and telework scenarios and easily integrated with the collaboration tools of your choice, Acumatica delivers flexibility, efficiency, and continuity of operations to growing small and midmarket organizations.

Business Resilience. Delivered.

Learn more about how Acumatica can work in your business by visiting us online at www.acumatica.com.

 **Acumatica**
The Cloud ERP

