



CHECKLIST · CONSTRUCTION

Construction ERP Evaluation Checklist

A printable checklist of the questions that separate a real construction ERP from accounting software with a job-cost bolt-on. Bring it to every vendor demo and score each answer on the spot.

CONSTRUCTION · CHECKLIST

An ERP demo is a controlled environment. The vendor picks the data, the workflow, and the pace. This checklist exists to take some of that control back.

Print it, bring it to every demo, and ask the same questions of every vendor. The goal is not to catch anyone out. It is to make three very different pitches comparable on paper.

The team

- ☐ Who on your team has implemented for a company my size, in my industry? Ask for names, not company credentials.
- ☐ What did those projects look like at month three? Listen for specifics.
- ☐ Will the people in this demo be the people on my project?
- ☐ How many implementations is each consultant running at once?
- ☐ Can I speak to a reference who went live three years ago, not three months?

Job costing, live on screen

- ☐ Show me a job with committed costs from POs and subcontracts, not just actuals.
- ☐ Show me cost-to-complete on an open job and who updates it.
- ☐ Show me margin fade between two periods on the same job.
- ☐ Enter a field timesheet on a phone and show me where the cost lands.
- ☐ Show me one job across divisions, with costs coded to the right one.

Billing and retainage

- ☐ Show me a progress bill with retainage held, in both directions: held on you, and held by you on subs.
- ☐ Show me a retainage release and the invoice it generates.
- ☐ Show me an AIA-style billing format if my owners require one.
- ☐ Show me a change order flowing from approval to budget to invoice.

The implementation

- ☐ Walk me through your phase plan: discovery, design, build, training. Vague answers here predict vague projects.
- ☐ Who does data migration, and what happens to my historical job costs?
- ☐ What does a parallel run look like, and how long do you recommend one?
- ☐ What do you need from my team, in hours per week, during each phase?

Month seven and beyond

- ☐ Who answers the phone when something breaks at month-end?
- ☐ Is support a ticket queue or a consultant who knows my file?
- ☐ What does a typical support response look like in practice?
- ☐ How do upgrades work, and who tests my customizations?
- ☐ What happens if my main consultant leaves your company?



Questions about any of this?

Summit Business Systems has been implementing ERP for Ontario businesses since 1991. We are an Acumatica Gold-Certified Partner based in Barrie, working with construction, field service, distribution, and professional services companies across the province. If you want a second opinion on anything in this checklist, we give straight answers.

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