

Construction ERP System Evaluation Checklist

Selecting a Construction ERP solution to run your business is a decision that will affect your company for many years. Many products offer the same or similar features, and it can be confusing to sort out what's important and what's not. This tool can help.



Use this checklist to compare features and benefits across five critical categories:



PRODUCTIVITY

What can the product do to make you and your staff in the office and on the job site more productive?



FUNCTIONALITY

What features and functions does the product have that can perform your daily accounting and business management functions?



TECHNOLOGY

Does the product leverage the best technology for usability, customizability, and maintainability?



VALUE

How will the product maximize features and functions versus cost for the usable lifetime of the product?



RISK

How does the product minimize risk and facilitate both network and financial security?



Category 1: Productivity



Feature	Benefit	Priority	Acumatica		
Intuitive	Easy to learn and use.		✓		
True universal availability	Access the system from any device, anytime, anywhere to facilitate associates working on the job site and in the office. Easily communicate and collaborate with customers, subcontractors, and suppliers.		✓		
Multilingual	Work in the language of your choice. Print customer-facing documents (such as change orders) in the language of your customer.		✓		
Multicurrency	Operate in any currency and convert as needed.		✓		
Workflow	Automate business processes, approvals, and notifications.		✓		
Wiki's	Share information and company documents among any combination of teams, departments, and external users.		✓		
Single database	Establish a single version of the truth. Eliminate the need to maintain integrations between applications.		✓		
Comprehensive Reporting	Make faster, better decisions with fewer mistakes. Eliminate guesswork.		✓		
Document Management	Make critical documents available to all key personnel.		✓		



Category 2: Functionality



Feature	Benefit	Priority	Acumatica		
Multi-entity	Support multi-company, multi-warehouse, and international organizations. Perform financial consolidations, intercompany eliminations, and reconciliations.		✓		
Financial management	Perform standard accounting functions, including general ledger, accounts payable, accounts receivable, fixed assets, cash management, and tax management.		✓		
Construction Management	Manage projects end-to-end in a single system with contracts, commitments, subcontracts, purchase orders, change orders, retainage, service management, submittals, and daily field reports. Track the status of your subcontracts and purchase orders, including comparing budgets to actuals and line-item committed costs.		✓		
Job Cost Accounting	See job costs and budget data from anywhere, with real-time project changes and profitability drill-downs. Enter AP invoices, write checks, and bill customers by stage or quantity directly in jobs, so accounting is always up-to-date. Monitor up-to-date vendor payment statuses.		✓		
Compliance Management	Modernize compliance management with included AIA billing and reporting, CFMA benchmarking, certified payroll, safety compliance tracking, and WIP and Bonding reports.		✓		
Strong third-party software support to extend product functions	Access a robust library of enhancements available to extend the product's functionality to meet your unique business needs with software such as Procore, Arcoro, Assignar, GoFormz, and ProEst.		✓		



Category 2: Functionality *(Continued)*



Feature	Benefit	Priority	Acumatica		
CRM combined with ERP	Share a single database between ERP and CRM – no need to synchronize two databases with the same information.		✓		
Integrated business intelligence	Go beyond spreadsheets and use integrated BI to understand what the financial and customer data is really telling you. Make informed, actionable decisions.		✓		
Included Field Service	Manage field team schedules and use mobile phones for GPS navigation, voice note dictation, mobile time reporting, and mobile expense receipt capture.		✓		
Sales Order Management	Split orders and allocate sold supplies across multiple jobs. Automatically replenish job sites with consumable materials. Create field service schedules directly from sales orders.		✓		
Purchase Order Management	Automate complex procurement processes involving Management multiple products, contracts, and suppliers. Receive inventory, input invoices, match and pay. Drop-ship directly to the job site through purchase orders and change orders.		✓		
Inventory/ Equipment	Manage inventory, plan and manage the movement of supplies and equipment across multiple locations, yards, and job sites.		✓		



Category 3: Technology



Feature	Benefit	Priority	Acumatica		
True cloud	All functionality is accessible through the internet using a standard browser without the need for any software installation on the user's device. No additional software licensing required.		✓		
Responsive design	View and interact with every page of the application on any device with a minimum of resizing, panning, or scrolling.		✓		
Customizable and flexible	Modify and customize business logic to meet your company's unique requirements.		✓		
User interface	Give your users a modern look and feel. Customize screens and dashboards. Gain easy access to business tasks with minimal clicks and an intuitive workflow.		✓		
Customization using industry-standard tools	Perform customizations using industry-standard tools and programming languages. Avoid the need to use proprietary languages or compilers.		✓		
Full relational database	Store all system data in a relational SQL database. Query data for reporting, BI, financial statements, and audits.		✓		
Database export	Access and export relational versions of all data for reporting, backup, and transfer.		✓		
Upgrade on your schedule	Plan upgrades at dates and times that are convenient for you and your company – not just the software vendor.		✓		
Capable of moving to the cloud when you are ready	Deploy the product in the cloud or on premises – whichever best meets your needs at the time. Switch deployment models any time it makes sense for your business.		✓		



Category 4: Value



Feature	Benefit	Priority	Acumatica		
Low Total Cost of Ownership (TCO)	Reduce the total cost of ownership over the foreseeable lifetime of the product (at a minimum 3-5 years), including licensing, support, hardware, upgrade, and hosting costs. Be sure to add the cost of additional products required to run the system (such as web server, database server, collaboration tools, and CRM), and include hardware, licensing, and support costs.		✓		
Scale as you grow	Accommodate heavier volumes, more resources, and more users as your business grows. Pay only for what you use. Add more resources when you need them.		✓		
Multiple deployment options	Choose between deploying in a public cloud using Amazon Web Services (AWS), in a private cloud of your choice, or on-premises in your facility.		✓		
Flexible licensing options	Choose between subscription or perpetual licensing (ongoing operating expense versus a depreciable capital expense).		✓		
Preserve capital for other business initiatives	Deploy in the cloud to reduce the initial cash outlay for hardware and software purchases. Cloud deployments reduce the amount of internal IT staff required for hardware and software support and maintenance.		✓		
Charged by resources used, not by user	Pay only for the resources you use, not for the number of users. Make the benefits of ERP available to all employees companywide. Charging by user penalizes growing businesses.		✓		



Category 5: Risk



Feature	Benefit	Priority	Acumatica		
Predictable monthly costs	Avoid spikes in IT costs. Standardizing on a platform allows you to predict your monthly cost for the system.		✓		
Deploy quickly	Eliminate time delay and risk of unplanned costs by deploying quickly with a cloud solution.		✓		
Leverage global technology leaders	Use the resources of cloud hosting leaders (such as Amazon, Microsoft, and IBM) to get fast response and uptime.		✓		
Customer references	Cites customer successes using their software in the construction industry.		✓		
Best-in-class security at no additional cost	Support platform, web, and computer security leveraging expertise at hosting providers.		✓		
Data in the cloud	Avoid leaving your data on your own servers where it is more vulnerable to attack.		✓		
Backup and disaster recovery	Prepare for the worst – cloud deployment lowers backup, failover, and disaster recovery costs.		✓		
Simpler integration with other web apps	Use web capabilities to integrate with other web-based business applications.		✓		
Vendor handles updates and upgrades	Eliminate the risk of missing an upgrade by choosing a cloud solution that’s continually updated.		✓		



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.



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