





## EXCEED EXPECTATIONS

# Boost customer loyalty with an unparalleled customer experience

Keeping customers happy during the entirety of their construction project is challenging. Contractors are notoriously unresponsive and unavailable. But in today's cut-throat construction world, frequent project status updates are expected. Contractors must communicate budget and timeline changes quickly and efficiently with all stakeholders.

“With Acumatica, I'm giving employees an ultra-efficient tool they need to do their jobs correctly and allowing them to do things easier. I'm handing them a smartphone versus a rotary phone. They are more well-equipped to do their jobs, which produces good outcomes for customers and helps us build the business.”

– MATTHEW SHAMP, EXECUTIVE DIRECTOR  
CARLSON-LAVINE INC.

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### COMPREHENSIVE CRM FUNCTIONALITY

Acumatica Construction Edition provides built-in, comprehensive CRM functionality to automate customer communications and strengthen relationships. Stay current with customer needs with a 360-degree view of customer transactions, projects, and financials. Log all contacts and activities for customers and prospects within CRM. Streamline lead management and events with sales automation and workflows. Manage leads and measure marketing effectiveness with marketing automation tools to improve conversions, measure campaign performance, and evaluate campaign profitability. Leverage the CRM engine to centrally store estimates, quotes, files, and agreements.

### ACCESS TO CRITICAL DATA AND REPORTS AT ANY TIME

With a single source of truth, executives and construction managers access critical data and reports, making communication with the customer fast and straightforward. Accelerate decision-making with a customized view of your business and focused oversight across

departments. Track RFIs, project issues, change orders, budgets, and cost codes to ensure each project stays on time and on schedule. Set up business events to notify customers when back-ordered materials arrive, milestones are obtained, or bills are due. Empower customers with online access to account information, open service orders, and project updates through the Customer Self-Service Portal.

### RESPOND TO CUSTOMERS QUICKLY FROM ANYWHERE

The superior Acumatica mobile applications empower workers to respond promptly to customers, vendors, and contractors from the field. Automate change orders and create project issue alerts for faster issue resolution and clear lines of communication. Streamline remote data entry from the field with mobile expense receipt capture, timesheets, and submittal and drawing logs. Expedite data entry and business processes with time and expense approvals from your smartphone.



## MAKE SMARTER DECISIONS

# Improve construction business decisions with powerful dashboards and real-time analytics

Construction data is only helpful with tools to access and measure it correctly. Use analytics and business intelligence to focus on Key Performance Indicators (KPIs) for a clear picture of past and current performance for informed future decisions. Analytics should provide concise budget information, such as hard and soft costs, change orders, overhead costs, and fees to proactively measure profit. This is how forward-thinking business leaders make sound decisions and agile actions to take on new challenges.

### MANAGE COMPANY DATA WITH ROLE-BASED DASHBOARDS

Acumatica automatically generates personalized dashboards based on user needs and preferences. Every Acumatica dashboard is mobile-ready and compatible with any web-enabled device, so users enjoy real-time data at their fingertips.

**Business:** Business owners, CEOs, and presidents benefit from role-specific reports and notifications for faster issue resolution. Business leaders must make key strategic business decisions that drive revenue and profitability based on the company data available on their dashboards.

**Finance:** CFOs, controllers, and VPs of finance use dashboards to identify financial trends, monitor data, and access in-depth analysis. This data should help them oversee the financial health of the company and analyze performance. Finance leaders also use Acumatica's CFMA Benchmarker tool to compare the company's financial performance against peers and identify areas for improvement.

**Operations:** Operations leaders use personalized dashboards to track job costs, change orders, and budgets. The project manager, superintendent, or foreman manages daily project operations and promote employee engagement. They use role-based dashboards to identify and resolve customer issues from the job site.

**Service Manager:** The service manager must drive revenue within the field service business unit. Real-time analytics improve service levels with proactive problem resolution. Field service requires views of technician schedules, service appointment inventory, and expense management. Managers use dashboards to drill down into service data for detailed analysis and report on customer satisfaction levels.

### EASILY ACCESS DATA WITH PRE-CONFIGURED, ACTIONABLE REPORTS

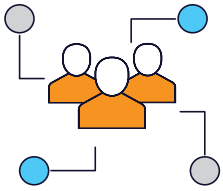
Acumatica includes hundreds of pre-configured reports, tailored to meet unique business needs without coding changes. Users select report criteria to customize the reports by pointing and clicking. Actionable reports provide drilldowns to source transactions for a complete picture of the business. Generate generic inquiry reports and business events to monitor the system for anomalies and quickly print or email updates to stakeholders, customers, or suppliers. The comprehensive list of Acumatica reports includes change order commitments, daily field reports, project WIP reports, subcontractor and compliance reporting, and more.

### IMPROVE COLLABORATION WITH FIELD TEAMS

Remote construction workers need the ability to submit accurate project information from the field to the main office. Acumatica ensures that everyone sees the same data, regardless of their physical location. Empower field teams to report critical project updates via mobile devices for full transparency. Easy-to-use mobile reports capture vital real-time project data. Project managers and supervisors record activities and project site conditions, allowing staff to analyze the project's profitability.

### ENHANCE BUSINESS DECISIONS WITH THE CFMA BENCHMARKER

Acumatica Construction Edition connects with the CFMA Benchmarker survey, automating construction financial data synchronization with the Construction Financial Management Association (CFMA). This functionality empowers executives with peer benchmarks against other CFMA members within Acumatica's dashboards. Compare corporate return on assets, return on equity, and several other financial measurements against CFMA members in your region. Identify areas of success and initiatives for future improvement.



## CONNECT FROM ANYWHERE

# Empower workers with connectivity and mobility

Many leaders launch their businesses with entry-level accounting systems, adding plug-in applications or custom systems to round out functional gaps. Companies often implement different systems for estimating, project management, payroll, and CRM. These systems frequently operate on different stand-alone platforms, creating siloed data, manual data entry, and an incomplete data set for analysis. Obtaining timely company information—especially when that data is ever-changing—can be cumbersome and error-prone without connected systems.

“First thing every morning, I can see what our case-load is like, what’s in our backlog, what are our active projects, and see from an executive-level key indicators of the health of the business. I don’t have to wait until the end of the month or two or three months after that to have clean labor data to learn the profitability of a job. With Acumatica Construction Edition, all of us have that data in real-time.”

– JEFF HAMILTON, PRESIDENT  
ROBERTS GLASS & SERVICE

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### **CAPTURE TIME-SENSITIVE DOCUMENTS FROM THE FIELD**

Contractors need access to accurate and timely project data to make strategic decisions. View critical reports on phones or tablets using the Acumatica mobile app. Send employee time and project updates seamlessly from the field. Capture time and certified and union job site documentation required for accounting in real-time. Use mobile devices to capture and send expense receipts and attach photos from the field to jobs and activities.

### **MANAGE COMPLIANCE DOCUMENTATION AND CONSTRUCTION PAYMENTS**

Managing construction payments is complicated and time-consuming. Compliance and subcontractor management without a connected platform quickly spirals out of control. Set alerts and expirations for insurance certificates and manage lien waivers effectively for complete transparency. Organize, track, and send payments and documents electronically to save significant amounts of time and money.

### **STAY AHEAD OF PROJECT ISSUES WITH MOBILE JOB STATUS REPORTS**

Acumatica Construction Edition is a centralized, single source of truth. Access critical reports on phones and tablets to arm field teams with project details. Office staff can promptly address issues in the field with real-time alerts and field reporting.

### **MAINTAIN EFFECTIVE SUBCONTRACTOR COMMUNICATION**

Subcontractors and vendors hired are all subject to the same safety and labor regulations as the contractor. Reliance on physical records for compliance leaves vital information vulnerable to loss or destruction. With a centralized and fully mobile platform, forms and documents can be created, stored, and shared between different crews and pulled up at any time from the job site. Collect all training, certifications, and documentation needed to guarantee complete subcontractor compliance.



## REDUCE TECHNOLOGY COSTS

# Mitigate your tech stack with a comprehensive business system

The disconnected systems that construction companies traditionally deploy often require onsite servers, operating systems, and database administration. System backups and cybersecurity concerns are expensive and potentially dangerous components of running a disconnected company. Legacy on-premises ERP applications require supporting infrastructure, licensing fees, and recurring maintenance and support costs. The traditional user-based licensing structure limits a company's ability to fully utilize the software with secondary staff cut out from the system.

“Conservatively, we could grow to 60 people in five years. When we do that, it's great to know Acumatica is not pay-to-play software, but that it's scalable with unlimited users, which gives us one less thing to worry about when forecasting our future costs.”

– BRUCE YOUNG, PRESIDENT & CO-FOUNDER  
CURRAN YOUNG CONSTRUCTION

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### LOWER INFRASTRUCTURE COSTS

With a fully connected Acumatica Construction Edition, all application data is in a single database, providing a 360-degree view of the business. Reduce infrastructure costs with all-inclusive hosting, operating system, and administration functions. Acumatica includes native payroll, CRM, fixed assets, inventory management, purchasing, and other applications on a single platform, eliminating costly and intrusive custom integrations.

### FLEXIBLE PRICING AND SCALABILITY FOR CHANGING BUSINESS NEEDS

Acumatica's flexible pricing model eliminates the need for long-term software licensing subscriptions. Pricing is based on system usage, not on the number of users. Empower every employee with secured access to

the information they need without additional costs. Whether it is taking advantage of a rapid growth opportunity or scaling for seasonal headcount fluctuations, Acumatica gives customers options to adapt to changing business needs.

### OPEN API FOR EASY INTEGRATIONS WITH TRUSTED VENDORS

Acumatica's open architecture is designed for no-code and low-code integration, providing an adaptable platform for future business needs. Add applications for shipping, estimating, project management, job scheduling, and other certified plug-and-play applications. Connect to extended business software solutions with SOAP or REST APIs to configure the system to meet specific business needs.



## FIELD SERVICE EXCELLENCE

# Elevate Service Levels and Retain Customers

Construction companies often discover a growing need to offer service work to customers. However, these companies typically need a mobile solution for their technicians to maximize their time in the field. Reliance on clipboards and physical paperwork creates a backlog of time-consuming manual entries, opening the door to human error.

### **DELIVER PROMPT SERVICE TO EACH CUSTOMER EVERY TIME**

Save time and eliminate errors with Acumatica Service Management. Empower users to update service schedules, assign appointments, make changes, and track travel time. With the ability to start and end appointments in the field, technicians thrill customers with prompt service and instant status updates to everyone back at the home office. Technicians also have access to equipment management for warranty information and repair history from the field. Acumatica for WorkWave Native Connector optimizes service routes to get the right employees to jobs faster based on their location, skill levels, and existing schedules.

### **CONTRACT MANAGEMENT AND AUTOMATED INVOICING**

Deliver customer service excellence with complete mobility for all service management data. Use service and maintenance contracts to facilitate product licensing and support. Tailor contract requirements to your business and your customers' needs. Define contracts by branch locations with flexible schedules and custom billing options. Generate invoices based on estimates or actuals and group invoices by service order, time frame, or customer purchase order. Automate billing cycles for contracts with Acumatica's powerful workflow engine. Transmit documents via email and empower your customers to access contracts and invoices from the secure customer portal.

### **IMPROVE CUSTOMER COMMUNICATION**

The Acumatica customer portal gives customers online access to secure account information. Customers review invoices, request quotes, and download documents. Use business events to send push notifications for appointment updates, such as service equipment availability and technician arrival times. This keeps the customer informed of critical service call updates. Use support cases to log customer issues, assign cases to support technicians, and manage progress through to resolution with a 360-degree view of accounting, service calls, and communications.

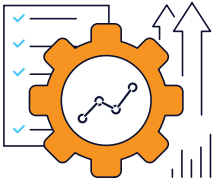
### **PLAN AND TRACK INVENTORY AND EQUIPMENT**

Ensure technicians have the right equipment and inventory to complete each job. With real-time access to the job progress, the materials used are documented with detailed notes and pictures. Track inventory in warehouses, physical storage locations, and mobile service vehicles to replenish supplies and ensure inventory availability. Leverage replenishment reports to understand how much and when to buy for future and current demand. Acumatica's powerful warehouse management system automates the stock receipt using barcodes and mobile scanners and smartphones. Employees can transfer stock between locations and pick inventory for service orders with streamlined and configurable workflows.

“Our stakeholders and project managers in the field have access to reporting data in real-time and that has been huge for us.”

– AASHA CUNNINGHAM, DIRECTOR OF ACCOUNTING AND ADMINISTRATION, PHOENIX RENOVATION AND RESTORATION

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## PROPERTY MANAGEMENT

# A future-proof application for property managers

Property management is a rapidly growing industry. Many construction firms that build properties also manage facilities. Further, property management companies must look for modernization with a true-cloud ERP. Regardless of the approach, it is still a fundamental truth that entry-level accounting solutions will limit growth and make it challenging to keep up with demand.

Access to real-time information helps to minimize vacancies and streamline mundane business processes. The best property management systems are easily personalized for different roles and responsibilities within the company. Acumatica's native cloud software provides lease management for commercial and mixed-use properties. It is built using a flexible framework with open APIs and low-code, no-code customization features to fit your organization's needs.

“With Acumatica, we have a single source of truth that’s actionable which cuts down on errors, cuts down on confusion and ultimately makes us more profitable.”

– SHEL WAGGENER, PRESIDENT  
AMERICAN ASPHALT REPAIR & RESURFACING

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### **POWERFUL FEATURES FOR PROPERTY ACCOUNTING**

Property managers need to know what is happening in real-time at every facility and with every tenant. Automate electronic billing, accounts payable, and expense reporting with mobile apps and artificial intelligence. Forecast cash flow and manage costs and overhead by company, branch, and building. Mitigate bad debt collections with automated late notices, dunning letters, and NSF check processing.

### **BUSINESS ANALYTICS TO GROW REVENUE AND LOWER COSTS**

With business intelligence and analytics, Acumatica gives complete visibility into whether a property is competitive and profitable. This data also delivers financial insights that help save money by controlling expenses. Organize properties using companies and

branches for financial transactions, consolidations, and analysis. This 360-degree view of the health of each property helps business leaders make faster and better decisions.

### **KEEP STAFF ENGAGED AND TENANTS HAPPY**

Strengthen staff and tenant relationships with Acumatica's automated processes and easily accessible data. Arm facilities and service staff with information such as tenant activities, appointments, lease agreements, maintenance orders, and service calls. Log in from anywhere to create maintenance work orders for service technicians. Streamline support cases with automated workflows and notifications to improve communication between staff and tenants. Reduce staff demand by allowing tenants to view support cases and statements via the online self-service portal.

## ABOUT ACUMATICA CONSTRUCTION EDITION

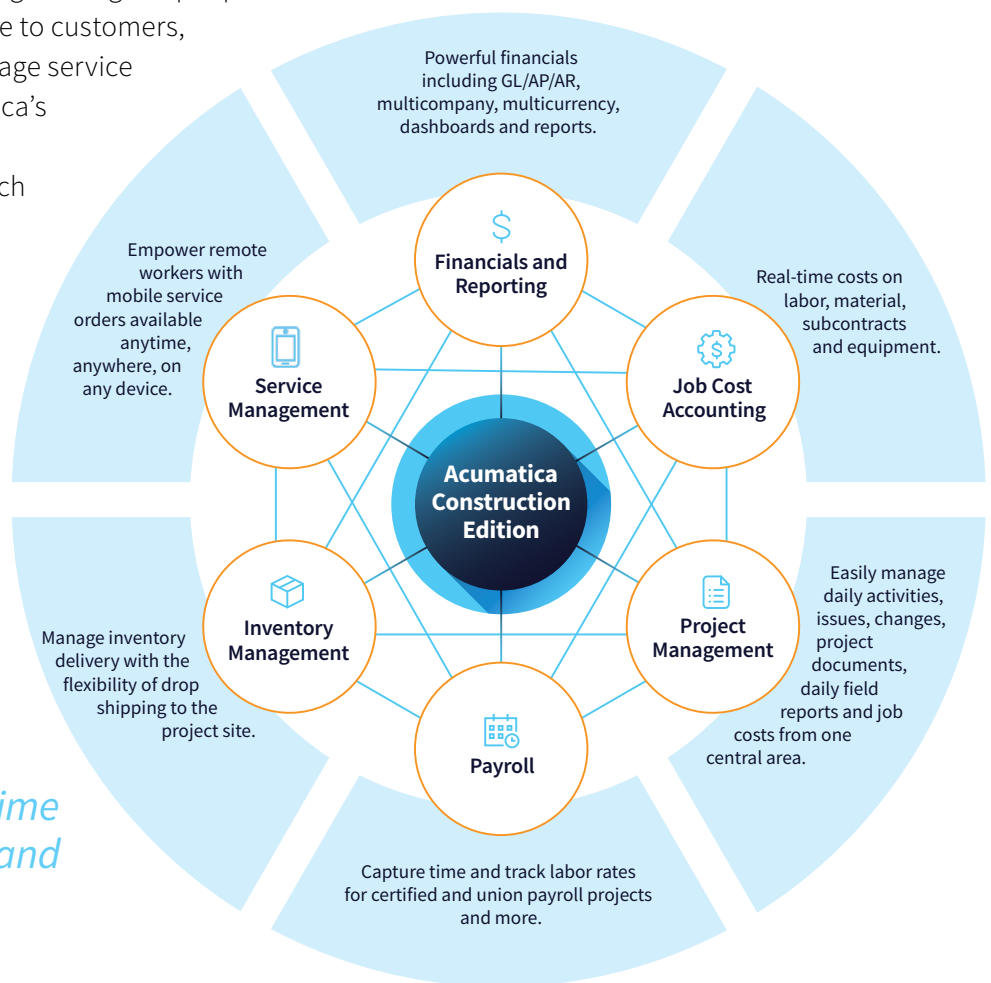
# Compete and Grow with a Modern, Comprehensive ERP Application

The construction industry continues to evolve and change. Growing demand for true cloud-based technology allows companies to eliminate siloes, boost customer satisfaction levels, and prepares them for growth.

Acumatica Construction Edition comes equipped with full CRM functionality for clear customer communication. The role-based dashboards with AI and machine learning provide the right people with the right information to collaborate and look to the future. The Acumatica mobile app supplies centralized access to critical reports, compliance documents, and project progress updates. Users save money with Acumatica's unique usage-based pricing, which allows them to lower infrastructure costs and scale up and down for changing business needs. Field service management gives people the ability to deliver prompt service to customers, plan and track inventory, and manage service contracts from anywhere. Acumatica's native cloud software also has full property management features such as property accounting and lease management for commercial and mixed-use properties.

Turn to Acumatica Construction Edition to leverage automation, workflows, and document management to connect data throughout the company and improve customer service for a future-proof growth strategy.

*Connect field, office and remote workers in real-time with cloud construction and accounting software.*



**Learn why Construction companies rely on Acumatica for their success.**

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## About The Answer Company



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