Project Management Perfection with Acumatica Construction Edition

Featuring Asite and Procore Connected Apps

A CONSTRUCTION PROJECT MANAGEMENT OVERVIEW

At its core, project management in the construction industry refers to all processes needed to complete the job successfully. Many stakeholders must coordinate during the project lifecycle to plan and execute the job. This collaboration is necessary regardless of where each team member is working. Strong communication skills and deep industry-specific knowledge are mandatory to complete the job successfully.

Project leaders do not have time to hunt down and manually send documentation. Their time is better spent proactively handling the day-to-day demands of the project. However, disconnected systems for managing people, materials, and equipment make collaborating with others cumbersome and distract managers from project management. This inefficient and unnecessary process results in higher staff turnover, budget overruns, and endangers the project's success. The longer it takes to relay project information to office staff and company leaders, the higher the likelihood that a critical issue will go unaddressed.

A true cloud ERP platform like Acumatica provides users with a central system for all project details, fostering project success and delighting customers. Connect stakeholders with Acumatica's comprehensive daily field reports so every detail, large and small, is reported in real time. Use configurable workflows and personalization to ensure that everyone has the information they need to manage their daily tasks. Empower project managers and staff to drive growth, reduce costs, improve quality, and increase profits while giving customers and employees a modern and extraordinary user experience.

This solution brief details construction project management requirements and the ERP software that supports critical business processes. Learn how the Acumatica Project Management features pave the way to construction project success and how to extend the system with robust connected applications.
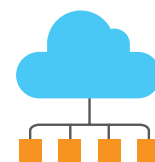
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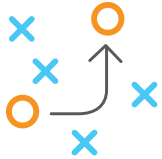
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Learn why Construction companies rely on Acumatica for their success.

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Construction Project Complexities

Keeping track of all the moving parts in a complex construction project is very demanding. Countless activities occur on a job site daily, all needing guidance toward completion. Cost, time, quality, safety, and team management contribute to the demanding job of managing a construction site.

BELOW ARE FIVE DIFFICULTIES COMMONLY FACED DURING THE EXECUTION OF A CONSTRUCTION PROJECT.

UNCLEAR OBJECTIVES Project goal uncertainty and disagreements lead to confusion that delays project schedules and inflates project costs for labor and administrative tasks.

→ Communicate clear objectives, set expectations, and control costs with Acumatica's real-time field reports for documentation, requests for information, submittals, and photo logs.

UNREALISTIC TIMELINES Unreasonable project schedule requests undermine morale and productivity. Project managers must push back on these requests to offer viable alternatives.

→ Set reasonable and achievable timelines based on project details, specifications, and inspections with Acumatica's native project management features.

BUDGET LIMITATIONS Since RFIs and change requests are unavoidable, construction projects often exceed budget estimates. Establish a process for changes and watch material, equipment, and labor prices closely.

→ Rein in budget overruns with complete transparency on planned costs and tools to adjust budgets as needed based on vital information collected during the project.

POOR COMMUNICATION Project progress, data, and observations go nowhere without a clear process to convey the information to stakeholders. From the start, project leaders should establish a system to inform their team about daily issues and successes.

→ Improve communication and collaboration with Acumatica's field reports and mobile app. Capture time, expenses, and requests with a designated process for reporting on project progress.

HAZARD MANAGEMENT From worker safety to weather delays, hazards are plentiful at a construction job site. Training and clear business processes mitigate accidents, creating a safe work environment.

→ Create a safer job site with automated notifications for expiring safety records and ensure employee training is properly documented all within Acumatica's single source of truth.

Built-In Project Capabilities

Face construction project challenges head-on with clear objectives, realistic timelines, and attainable budgets. Acumatica's robust project management features streamline communication with features to minimize hazards for a safe work environment.

Acumatica Construction Edition holistically supports every step of the construction project lifecycle from bid to closeout. The Acumatica Construction Project Management module enables effective job site management with daily field reports, RFIs, submittals, photo logs, and project issue reporting.

DAILY FIELD REPORTS

The daily field report lists everything of note that occurred on the job site each day, ensuring clear communication lines. Project managers and supervisors record observations and activities that could impact the budget and timeline. Weather reports and photos are sent to convey possible hazards. This information is valuable for analyzing problems that may impact the project's overall profitability.

Acumatica's comprehensive daily field report feature lets users in the field pull together all activities happening on the job site and send the report to the office using any mobile device. Select by project or by date for visibility into progress and quick issue resolution.

RFIS

Requests for Information (RFIs) may come from a subcontractor or contractor to obtain information that is unclear or not present in the contract documents. RFIs are often submitted while the project is underway for clarification. Sometimes the RFI is used to suggest a change in materials or to better understand the owner's intended use of a part of the project.

Acumatica empowers users to enable RFI work-flows to track each request's status. Use RFIs to create change requests and close them when they are completed to keep the project on schedule.

SUBMITTALS

A submittal contains proposed changes or details that need approval before their implementation on the project. Submittals can include drawings, finished product components, product cut sheets, and many other granular details of a project.

Submittals must be reviewed and approved before items are fabricated, purchased, or delivered to the job site. Any delays in getting the submittals into the right hands for approval can derail the project timeline and jeopardize the budget.

Track the submittal approval in Acumatica for related documents and materials before they are fabricated, purchased, or delivered to the job site. Review entries, enable submittal workflows, and close them when approved and completed.

PHOTO LOGS

Photo logs are used to store all photos taken for a project. They are saved and shared securely to document project progress and surface issues that may need to be resolved.

In Acumatica Construction Edition, job site managers and other employees use mobile devices to take progress photos. These images can be associated with a specific project or project task. Download and email photos from a selected photo log.

PROJECT ISSUES

Unexpected problems must be addressed as soon as possible to ensure the least impact on schedules and project costs. When they are reported, construction site issues can result in a request for information or a change request.

In Acumatica, project issues are used for tracking and reporting all activities that are related to the issues encountered on the job site. Creating a project issue in Acumatica allows the user to associate it with a project or a project task. Set the issue's priority level and easily convert it to a change order or RFI. This powerful feature also allows users to alert necessary stakeholders if the issue has impacted the project schedule or budget.

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.

"Acumatica is malleable and with the ability to integrate with Procore, it's helped us connect field and office. Now that we have the field guys in the software, they live in Procore, in project management."

– BILL AGEE, CFO, LIFECYCLE CONSTRUCTION

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INTEGRATIONS

Advanced Project Management

Complex construction projects may require advanced capabilities beyond those mentioned previously. Asite and Procore are popular additions to the Acumatica Construction Edition, providing advanced features with seamless connections to Acumatica data and business workflows. Additional information is available on the extensive Acumatica Marketplace.

PROCORE-BUILT CONNECTOR

Procore is the leading construction project management solution available for North American construction firms. When paired with Acumatica's superior field capabilities, Procore gives users a 360-degree view of vital project data. The Procore-built connector is available on the Acumatica Marketplace.

ASITE PROJECT WORKFLOW

Newer to the North American market, Asite has a large European presence. Asite is gaining traction with Acumatica partners and customers for its flexible and configurable platform. Asite Project Workflow is built on the Acumatica xRP Platform with an embedded project management dashboard inside the Acumatica workspace.

ADDITIONAL PROJECT MANAGEMENT FUNCTIONALITY

Procore and Asite are two advanced construction project management systems that extend Acumatica with added functionality. Both systems support all the features below. It is important to discuss each solution's unique strengths to identify the right fit for your specific needs.

SCHEDULING Timeline expectations are a moving target on a job site. With multiple crews, subcontractors, and project stages, losing track of the schedule happens quickly and can derail the entire project.

The integrations with Asite and Procore provide a centrally located and dynamic schedule ensures project managers view the site schedule and specific tasks from the field.

SPECIFICATIONS The success rate of the project depends on specific details or specs. Failure to communicate building specs can result in a high change order rate and increased risk.

All stakeholders need effortless access to the building specs from anywhere. The specifications in both Procore and Asite descrcibe the scope of work, matericals used, and the work required to complete the project.

INSPECTIONS Regular inspections help identify hazards before they lead to incidents. Without detailed and easily accessible inspection records, companies are unprepared for costly surprises.

Leverage Procore and Asite integrations to capture inspection report, easily access them, and get notifications when existing inspections are completed, passed, or failed.

OBSERVATIONS & INSTRUCTIONS It is important to step back and make an objective assessment of progress, safety findings, and anything unusual. Without a specific course of action for these instructions, observations are futile.

Report on-site observations within Procore or Asite, give instructions, and electronically submit the document for actions needed. Ensure no issue goes unresolved, thus avoiding escalation over time.

MEETING MINUTES Stakeholders are present at project meetings to discuss emerging issues and how they will be resolved. Meeting minutes function as a history of the project's status, the plan forward, and the parties involved.

Both applications give users the ability to record each meeting's minutes in one central location to accurately represent the main discussion points and key takeaways. Store minutes for access to hold parties accountable.

TRANSMITTALS With so many documents changing hands during the course of a project, transmittals are proof that documents were sent. Without this essential audit trail, parties can be liable for claims or lawsuits.

Store and retrieve transmittals on-demand to quickly prove what was sent, when, and by whom to enable a smooth flow of flow of documents between Acumatica and Asite or Procore.

PUNCH LISTS This document lists final tasks and corrections that need to happen before a project is considered complete. A punch list is a way to ensure the client is satisfied with the quality of the work and provides closure to the project.

Ensure all punch list information is accurate and in one place to avoid delays in correcting the issues found. Give punchlist access within Procore or Asite to empower the team towards completion of all outstanding tasks, to the delight of the client.

"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
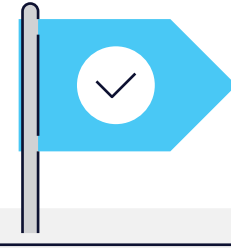   SPOHN ASSOCIATES, INC.**

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Project Management with Acumatica Construction Edition

Legacy construction platforms do not traditionally have native project management features like Acumatica. Adding real-time workflows and building one-off integrations can quickly become expensive and difficult to maintain and support.

Handle each project management challenge with Acumatica. Add advanced project support with the connected Asite or Procore applications to extend and complement Acumatica's core project management features. With Acumatica and connected project management apps, you will improve collaboration between the field and office to monitor and maintain objectives, timelines, and budgets. Quickly find, assess, and resolve issues proactively to keep the project moving forward and ensure a positive impact on the bottom line.

Acumatica partners with Procore and Asite for advanced project management features that enhance and complement the existing Acumatica Construction Project Management module. Open APIs and low-code or no-code development tools facilitate rapid integrations. Talk with your partner about the project management solution that fits your unique business needs.

Acumatica Construction Edition's one source of truth for all project data, configurable workflows, and rapid integration tools make it the best platform to support your business today, tomorrow, and for years into the future.

"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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To learn more about how Milestone and Acumatica can streamline your business, visit **www.milestoneis.com.**

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