

Construction Management System Evaluation Checklist

Selecting a project management and accounting system 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 the features and benefits of construction system vendors across these five categories:

- ✓ **PRODUCTIVITY** What can the product do to make you and your staff more productive?
- ✓ **FUNCTIONALITY** What features and functions does the product have that actually perform the daily accounting and business management functions?
- ✓ **TECHNOLOGY** Does the product leverage technology for usability, customizability, and maintainability?
- ✓ **VALUE** How does the product maximize features and functions vs. cost for the usable lifetime of the product?
- ✓ **RISK** How does the product minimize risk and facilitate security (both network and financial security)?



| Category | Feature | Benefit | Priority | Acumatica | Vendor #2 | Vendor #3 |
|----------------------------------|--|--|----------|-----------|-----------|-----------|
| CATEGORY // PRODUCTIVITY | | | | | | |
| PRODUCTIVITY | Intuitive | Easy to learn and use. | | ✓ | | |
| PRODUCTIVITY | True universal availability | Access to system from any device, anytime, anywhere to facilitate staff working in the field and with customers and suppliers. | | ✓ | | |
| PRODUCTIVITY | Multi-language | Work in the language that best fits you. Print documents (like change orders) in the language of your crew. | | ✓ | | |
| PRODUCTIVITY | Multi-currency | Work in any currency and convert as needed. | | ✓ | | |
| PRODUCTIVITY | Workflow | Automate business processes, approvals, and notifications. | | ✓ | | |
| PRODUCTIVITY | Wiki's | Share information and company documents among any combination of teams, departments, and external users. | | ✓ | | |
| PRODUCTIVITY | Document Management | Make documents accessible to all key personnel. | | ✓ | | |
| PRODUCTIVITY | Better, quicker decisions and fewer mistakes | Comprehensive reporting to make informed decisions without the guesswork. | | ✓ | | |
| CATEGORY // FUNCTIONALITY | | | | | | |
| FUNCTIONALITY | Multi Entity | Support multi-company, multi-warehouse, and international companies, including financial consolidations, intercompany eliminations, and reconciliations. | | ✓ | | |
| FUNCTIONALITY | Financial Management | Support standard accounting functions, including General Ledger, Accounts Payable, Accounts Receivable, Cash Management, Tax management, and more. | | ✓ | | |
| FUNCTIONALITY | Construction Management | Direct end-to-end projects including contracts, commitments, subcontracts, purchase orders, change orders and compliance. | | ✓ | | |
| FUNCTIONALITY | Job Cost Accounting | Enter A/P invoices, write checks, bill customers, and charge time to jobs so that job cost and billing information is always up-to-date. | | ✓ | | |

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| FUNCTIONALITY | Strong third-party software support to extend product functions | Access to library of enhancements available to extend the functionality of the product to meet your unique business needs, such as Procore, ProEst, and DocuSign. | | ✓ | | |
| FUNCTIONALITY | Integrated Business Intelligence | Go beyond spreadsheets and use integrated BI to understand what the financial and customer data is really telling you, so you can make informed, actionable decisions. | | ✓ | | |
| FUNCTIONALITY | CRM combined with ERP | Share a single database between Enterprise Resource Planning and Customer Relationship management – no need to synchronize two databases with the same information. | | ✓ | | |
| CATEGORY // TECHNOLOGY | | | | | | |
| TECHNOLOGY | 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. | | ✓ | | |
| TECHNOLOGY | Responsive design | View and interact with every page of the application on any device with a minimum of resizing, panning, or scrolling. | | ✓ | | |
| TECHNOLOGY | User interface | Modern look and feel. Customize screens and dashboards. Easy access to tasks with minimal clicks and intuitive workflow. | | ✓ | | |
| TECHNOLOGY | Customizable and flexible | Ability to modify and customize business logic to meet your company’s unique requirements. | | ✓ | | |
| TECHNOLOGY | Customization using industry standard tools | Perform customizations using industry standard tools and programming languages without requiring the use of proprietary languages or compilers. | | ✓ | | |
| TECHNOLOGY | Full relational database | All system data stored in a relational SQL database. Query data for reporting, BI, financial statements, audits, and more. | | ✓ | | |
| TECHNOLOGY | Database export | Access and export relational versions of all data for reporting, backup, and transfer. | | ✓ | | |
| TECHNOLOGY | Upgrade on your schedule | Ability to plan upgrades at dates and times that are convenient to you and your company – not the software vendor. | | ✓ | | |

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| CATEGORY // VALUE | | | | | | |
| VALUE | 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. | | ✓ | | |
| VALUE | Multiple deployment options | Deployment methods include private cloud of your choice or our public cloud using Amazon Web Services (AWS). | | ✓ | | |
| VALUE | Preserve capital for other business initiatives | Cloud deployments reduce the need for initial cash outlay for hardware and software purchases. Cloud deployments also reduce the amount of internal IT staff required for hardware and software support and maintenance. | | ✓ | | |
| VALUE | Charged by resources used, not by user | Vendor charges for the resources used, not by user count, making the benefits of ERP available to all employees, customers and suppliers. | | ✓ | | |
| CATEGORY // RISK | | | | | | |
| RISK | Predictable monthly costs | Not vulnerable to spikes in IT costs. Standardizing on a platform allows you to predict your monthly cost for the system. | | ✓ | | |
| RISK | Deploy quickly | Eliminate time delay and risk of unplanned costs by deploying quickly with a cloud solution. | | ✓ | | |
| RISK | Leverage global technology leaders | Ability to utilize the resources of cloud hosting leaders (Amazon, Microsoft, and Google) for their fast response and uptime. | | ✓ | | |
| RISK | Knowledge of your industry | Reduce risk by using a software vendor with the solutions and knowledge for your business. | | ✓ | | |
| RISK | Customer references | Cites customer successes using their software in your industry. | | ✓ | | |
| RISK | Best-in-class security at no additional cost | Support platform, web, and computer security leveraging expertise at hosting providers. | | ✓ | | |
| RISK | Data in the cloud | Data on your servers are vulnerable to attack. | | ✓ | | |

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| RISK | Backup and disaster recovery | Prepared for the worst – cloud deployment lowers costs for backup, failover, and disaster recovery. | | ✓ | | |
| RISK | Simpler integration with other web apps | Utilize web capabilities to integrate with other web-based business applications. | | ✓ | | |
| RISK | Vendor handles updates and upgrades | Eliminate risk of missing an upgrade with a cloud solution. | | ✓ | | |



ABOUT ACUMATICA

Acumatica is the world’s fastest growing provider of cloud ERP, with the industry’s highest customer satisfaction rating trusted by companies across diverse industries. Acumatica is easy-to-use, full-featured and mobile software. With unlimited users, everyone can have a real-time view of your business anytime, anywhere. Learn more at acumatica.com.