


# CMiC's Leading Construction ERP: Financials and Project Management Applications

**QUICK REFERENCE GUIDE**



Efficient operations are crucial for the success of any construction company. In an industry where time, resources, and coordination are vital, leveraging software solutions can significantly enhance operational efficiency.

## Introduction

ERP systems are comprehensive software solutions that integrate various business functions and processes into a unified platform. In the context of the construction industry, ERPs facilitate seamless management of projects, supply chains, and the workforce. These systems provide functionalities such as project planning, resource allocation, procurement, inventory management, HR integration, and real-time data analytics.

As your construction firm takes on a growing number of projects – and tries to keep them running on budget and on schedule – you depend on much greater cost and pricing transparency. This is where incorporating a robust construction-specific ERP into your firm’s technology stack sets the stage for long-term success.

## CMiC’s Fully Integrated ERP Built on a Single Database Platform™

CMiC’s ERP, the leading next generation construction software, is a fully integrated solution that is designed to deliver industry-specific functionality and workflows. Our robust solution transforms how construction firms optimize productivity, minimize risk and drive growth by planning and managing all financials, projects, resources, and content assets.

Our biggest differentiator is that our ERP is built on a Single Database Platform™, which is proven to provide key business benefits:

- 1. Centralized Data Management:** Streamlined operations, real-time analytics and data accuracy.
- 2. Data Migration:** Reduced downtime, enhanced data integrity and cost savings.
- 3. Enhanced Data Platform Capabilities:** Scalability, customization, robust reporting and analytics, and advanced integration features.
- 4. Improved Efficiency and Productivity:** Streamlined workflows, effective resource allocation, reduced redundancies, and faster decision-making.

With an exhaustive suite of Financials and Project Management applications built with “layered-in” business intelligence software, our “all-in-one” ERP helps construction firms deliver integrated project delivery, drive financial growth, support scalability, and make strategic, data-driven decisions.

## CMiC Financials

### Overview

CMiC Financials, designed for general and specialty contractors, helps finance teams optimize revenue, expenses, and financial management practices. Beyond helping you manage financial transactions, our solution flows everything into both your general ledger and your job costing simultaneously, eliminating the need for duplicate or manual transactions.

Through its cutting-edge, industry-specific functionality with proven workflows, CMiC Financials provides complete visibility of real-time data in complex environments with shifting cost structures, equating to persistently reliable financial reports and projections, from the corporate office to field operations.



## Key Applications, Features and Business Benefits

APPLICATION	FEATURES	BUSINESS BENEFITS & USES CASES
<b>Accounting</b>	<ul style="list-style-type: none"> <li>• Consolidated General Ledger</li> <li>• Accounts Payable</li> <li>• Accounts Receivable</li> <li>• Billing</li> </ul>	<ul style="list-style-type: none"> <li>• Revenue Management: Oversee contractor invoices, case receipts, and revenue projects across your business.</li> <li>• Cost Management: Manage job and labor costs, inventory, equipment, materials, and contractors, all in one place.</li> <li>• Financial Reporting: Leverage robust financial reporting capabilities, invoicing, case receipts and projections.</li> <li>• Financial Management: Ensure that field and accounting teams are working from the same set of financial data.</li> </ul>
<b>Project Controls</b>	<ul style="list-style-type: none"> <li>• Change Management</li> <li>• Bidding and Procurement Management</li> <li>• Subcontractor Management</li> <li>• Cost, Revenue &amp; Budget Management</li> </ul>	<ul style="list-style-type: none"> <li>• Manage the entire change order lifecycle, enter, and approve change orders online, on top of generating change orders from answered RFIs.</li> <li>• Track and analyze bids, automate bid receiving and the evaluation process, and define exclusions, inclusions, and special pricing for bid packages.</li> <li>• Create, track, and approve vendor applications online; prequalify subcontractors before they start to work on a project; and manage licenses, trade types and insurance information.</li> <li>• Track time, manage expenses and capital costs across projects and regions; create different cost philosophies, and create bills and invoices in a variety of formats.</li> </ul>
<b>Construction Payroll &amp; Human Capital Management (HCM)</b>	<ul style="list-style-type: none"> <li>• Workforce Management</li> <li>• Construction Payroll</li> <li>• CONSTRUCT Employee Self Service</li> <li>• CONSTRUCT Crew Time</li> <li>• CONSTRUCT Check-In</li> </ul>	<ul style="list-style-type: none"> <li>• Automate routine HR and payroll service tasks, manage payroll taxes, and eliminate duplicate data entries.</li> <li>• Manage payroll processes, including handling multiple pay rates, and demonstrate compliance by delivering certified payroll reports and accurate documentation.</li> <li>• Provide employees with access to benefits and salary status with ease through a single portal.</li> <li>• Record labor hours across diverse projects and activities, while accurately monitoring crew productivity.</li> <li>• Enhance crew productivity and streamline time management processes by providing clock-in and clock-out functionality, as well as the automated recording of breaks.</li> </ul>
<b>Equipment &amp; Inventory Management</b>	<ul style="list-style-type: none"> <li>• Equipment and Fixed Assets</li> <li>• Material Procurement &amp; Inventory</li> <li>• Preventative Maintenance</li> </ul>	<ul style="list-style-type: none"> <li>• Track your fleet, compliance control, and fixed assets, as well as manage depreciation to accurately plan your resources.</li> <li>• Automate purchase orders and requisition management to manage projects more effectively.</li> <li>• Track equipment maintenance and receive automated equipment maintenance alerts.</li> </ul>
<b>Opportunity Management</b>	<ul style="list-style-type: none"> <li>• Opportunities</li> <li>• Contacts</li> <li>• Organizations</li> <li>• Action Items</li> <li>• Attachments</li> <li>• Voice to Text</li> <li>• Duplication Check</li> <li>• Link-Related Items</li> </ul>	<ul style="list-style-type: none"> <li>• View all companies in your CRM in one place. Perform additional tasks, such as sorting, filtering, or editing organization-related information.</li> <li>• Search, filter, update and create new records to track action items.</li> <li>• Add new attachments to the record via the photo capture feature or upload them from a local device for effective document management.</li> <li>• Automatically convert your voice to text data with our speech recognition capability.</li> <li>• Leverage functionality that scans existing records automatically and checks for duplicates when you create new contracts or organizations.</li> <li>• Use features that create one record displays and automate the interconnectivity and relationships between key components, such as contacts, organization, opportunities, and action items.</li> </ul>

# CMiC Project Management

## Overview

CMiC Project Management enables construction firms to complete complex projects with tightly managed costs and timeframes. This set of solutions allows managers to collaborate with all project stakeholders, control project changes, manage subcontractor tasks, stay on top of material suppliers, simplify the bid process, and manage documents with confidence. In addition, managers can track labor productivity, labor budgets and payroll, and maintain the schedule of their field teams.

## Key Applications, Features and Business Benefits

APPLICATION	FEATURES	BUSINESS BENEFITS & USES CASES
<b>Project Controls</b>	<ul style="list-style-type: none"> <li>• Change Management</li> <li>• Bidding and Procurement Management</li> <li>• Subcontractor Management</li> <li>• Cost, Revenue &amp; Budget Management</li> </ul>	<ul style="list-style-type: none"> <li>• Manage the entire change order lifecycle, enter, and approve change orders online, on top of generating change orders from answered RFIs.</li> <li>• Track and analyze bids, automate bid receiving and the evaluation process, and define exclusions, inclusions, and special pricing for bid packages.</li> <li>• Create, track and approve vendor applications online; prequalify subcontractors before they start to work on a project; and manage licenses, trade types and insurance information.</li> <li>• Track time, manage expenses and capital costs across projects and regions; create different cost philosophies, and create bills and invoices in a variety of formats.</li> </ul>
<b>Drawing &amp; Construction Documents</b>	<ul style="list-style-type: none"> <li>• Drawings</li> <li>• Specifications</li> <li>• Submittals</li> <li>• RFIs</li> </ul>	<ul style="list-style-type: none"> <li>• View, mark up and share construction drawings to showcase a project's technical details in an easy-to-use format.</li> <li>• Streamline review and approval processes to ensure that specifications are met and fulfilled in a timely manner.</li> <li>• Ensure that project teams can ask questions and inform the design team of issues quickly.</li> </ul>
<b>Prequalification &amp; Procurement</b>	<ul style="list-style-type: none"> <li>• Subcontractor Prequalification</li> <li>• Bid Leveling (Analyzing Bids)</li> <li>• Invitation to Bid</li> </ul>	<ul style="list-style-type: none"> <li>• Automate the pre-qualification process – from submitting forms, to reviewing information, to approving or rejecting submissions.</li> <li>• Analyze all subcontractor responses – which are consolidated and organized – to optimize your selection and identify any discrepancies.</li> <li>• Use project codes and contacts to issue invitations to bid to a list of potential vendors automatically.</li> </ul>
<b>Quality &amp; Safety</b>	<ul style="list-style-type: none"> <li>• Checklists</li> <li>• Daily Journals</li> <li>• Issues</li> <li>• Punch Lists</li> </ul>	<ul style="list-style-type: none"> <li>• Ensure that procedures are followed, standards are adhered to, critical details are monitored, and deficiencies are identified and documented.</li> <li>• Track project activities, construction progress and safety incidents in real-time.</li> <li>• Proactively identify, track, and address safety and quality issues.</li> <li>• Ensure that subcontractors and vendors follow up with and complete outstanding tasks.</li> </ul>



# Workflow

## Overview

CMiC Workflow is designed to enhance your firm’s operational effectiveness by developing workflows to support business objectives. With CMiC, users create sophisticated, customizable and flexible workflows that improve the timeliness of transaction processing as well as customer response times.

By automating processes — such as sending messages and communications to all project stakeholders — CMiC Workflow enables users to receive, analyze and respond to notifications through messaging systems.

## Key Features and Business Benefits

FEATURES	USE CASES	BUSINESS BENEFITS
<b>Enterprise Content Management</b>	<ul style="list-style-type: none"> <li>Automate workflows to support your firm’s processes.</li> <li>Distribute messages and alerts quickly.</li> <li>Create advanced, customizable and flexible workflows.</li> <li>Capture and archive different types of documents across the enterprise.</li> <li>Seamlessly integrate Microsoft Office applications into the CMiC platform.</li> </ul>	<ul style="list-style-type: none"> <li>Improve communications with stakeholders in a timely manner.</li> <li>Eliminate unnecessary steps and reduce the risk of errors and duplications.</li> <li>Improve the speed and efficiency of accessing documents by any authorized user.</li> <li>Optimize operational decision-making.</li> </ul>
<b>Workflow</b>	<ul style="list-style-type: none"> <li>Automate workflows and align with your organization’s priorities, policies, and procedures.</li> <li>Distribute messages and alerts quickly.</li> </ul>	<ul style="list-style-type: none"> <li>Improve communications with stakeholders in a timely manner.</li> <li>Improve timeliness of transaction processing and customer response times.</li> <li>Eliminate unnecessary steps and reduce the risk of errors and duplications.</li> </ul>
<b>Document Control</b>	<ul style="list-style-type: none"> <li>Provide field teams with easy access to photos, drawings, and key assets.</li> <li>Set default contacts and descriptions for trades to speed up the process of creating punchlist items.</li> </ul>	

# Analytics

## Overview

CMiC Analytics enhances the immediacy and relevancy of fact-based insights within existing applications, providing your teams with the information required to make better decisions. By embedding directly into the core CMiC interface, the widgets and components function within existing screens, displaying reports and dashboards in an environment already familiar to users.

Key benefits include:

- ✓ Real-time visibility into project-specific data.
- ✓ Enhanced productivity across workflows.
- ✓ Enhanced control over cash flow.
- ✓ Optimized resource allocation and data-driven decision making.
- ✓ Ability to identify and respond to events with potential cost impact.

With a cutting-edge user interface expanded with innovative features, CMiC Analytics allows users to create a tailored workspace – essentially a canvas that can be used to launch Object Cards, including Dashboards, Queries and Card Views.



## Key Features and Business Benefits

FEATURES	BUSINESS BENEFITS & USES CASES
<b>Dashboards</b>	<ul style="list-style-type: none"><li>• Our Single Database Platform™ enables you to access all project data and perform data analysis from one dashboard.</li><li>• Our enhanced user interface, built with innovative features, allows you to create a tailored workspace using dashboards.</li></ul>
<b>Reports</b>	<ul style="list-style-type: none"><li>• Users can generate reports to measure key KPIs.</li><li>• You can drill into record-level data (e.g. source transactions) without the need for third-party analytics applications.</li></ul>

In the construction industry, where projects are complex, timelines are tight, and competition is fierce, leveraging all-in-one construction software built on a single database platform is a game-changer. Centralized data management, efficient data migration, enhanced data platform capabilities, improved security, and numerous other benefits make CMiC's ERP indispensable for modern construction firms. By embracing this technology, construction companies can not only streamline their operations but also gain a competitive edge in a dynamic and demanding marketplace. The decision to implement such a system is an investment in their future, ensuring that their construction business remains agile, efficient, and poised for growth.

To learn more about CMiC's next generation construction ERP, please click [here](#).

