



**VIEWPOINT**<sup>®</sup>  
A TRIMBLE COMPANY

CONSTRUCTION  
SOFTWARE BUYER'S  
GUIDE & FEATURE  
COMPARISON CHECKLIST

## WELCOME // Let's take a guess why you're here.

Spreadsheets and disparate systems are taking 3-4 weeks to generate a report and you're still not confident with that data your financial reports are showing, or worse, it's already out of date. Does this sound familiar?

Or maybe you just don't have the business intelligence you need to gain visibility and manage cash flow across all of your projects.

Whatever frustrating situation you've found yourself in that led you here, let it be known, you're in the right place to get your problem solved.

Managing construction projects while keeping a close eye on the cash flow of your business can be a nightmare. You know that already. So you've downloaded this guide to help you decide what construction software is the best option for your company.

### WHO THIS GUIDE WILL HELP

This guide has been specifically produced for

- CFOs, Finance Managers, Accountants and Project Managers who manage work

in commercial, industrial or residential construction, civil and infrastructure sectors,

- Sub contractors, and
- Service companies.

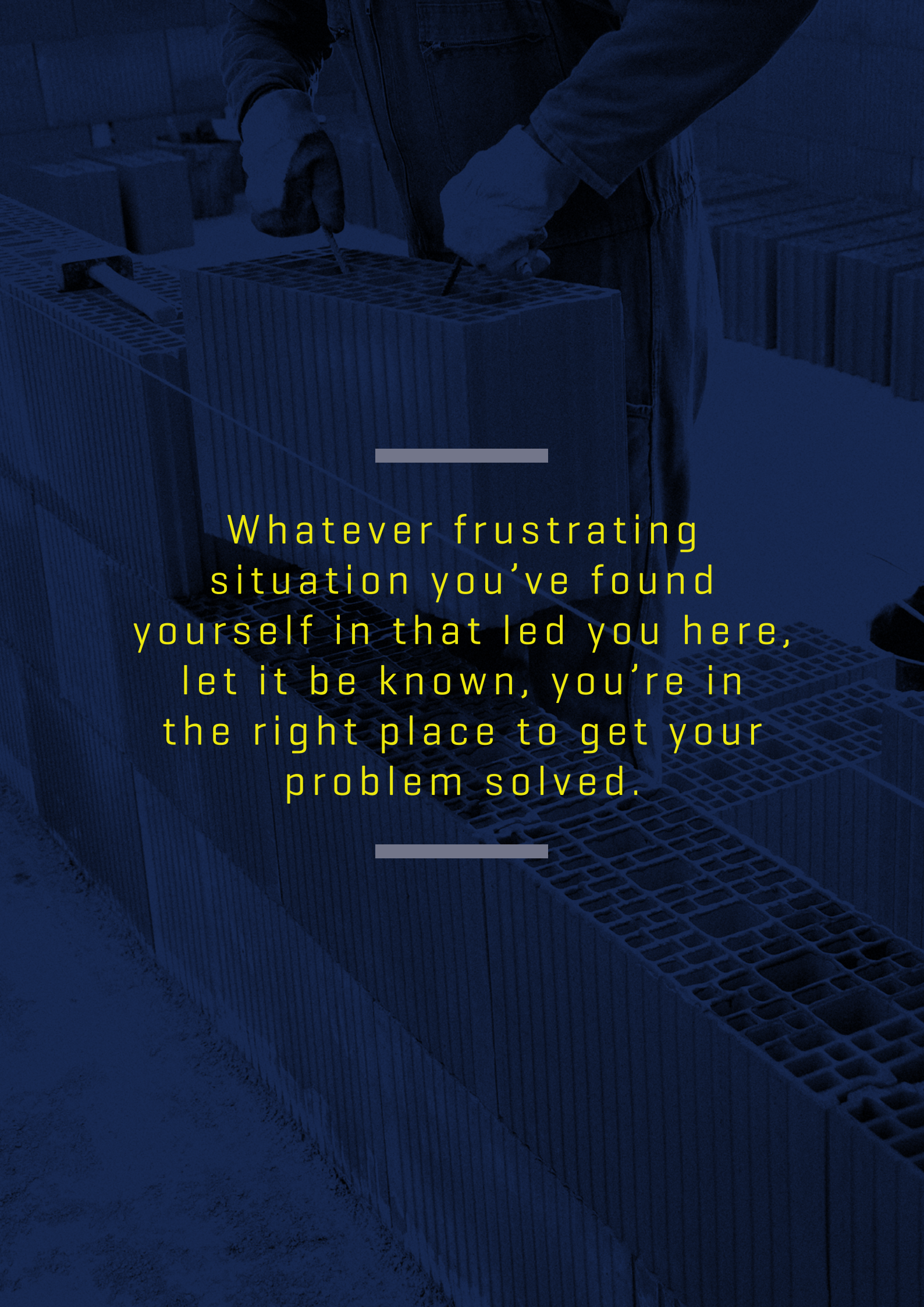
This being said, great construction software can help in many areas of your business - including stock management, human resources, assets, payroll etc. If you think someone else in your company could benefit from understanding the ins and out of construction software this guide may also help them.

### WHAT THIS BUYER'S GUIDE WILL HELP YOU DO

This buyer's guide has been developed to help you understand what to think about and then look for when researching the right software solution for your business. There's so much out there that at times it can be difficult to know where to start.

We hope that it will help you assess your needs, define your goals for the project, and compare your top three solutions so that you can be confident you've selected the best vendor for your business.





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# 1. DEFINING YOUR COMPANY'S NEEDS //

*This short section of this guide is to get you to start thinking about what you actually need in your software solution and what your personal and company goals are. By filling out this section you will have a clear picture in your mind and it will help to exclude any non-viable options when it comes to comparing your top three options on the market in the comparison template. You may find it easier to complete this section when you've finished reading the entire buyer's guide.*

## WHAT PROBLEM SHOULD THIS SOFTWARE SOLVE FOR YOU?

Take a moment and write down your 3 biggest problems that you need this software to provide for you [eg. Eliminate double data entry].

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

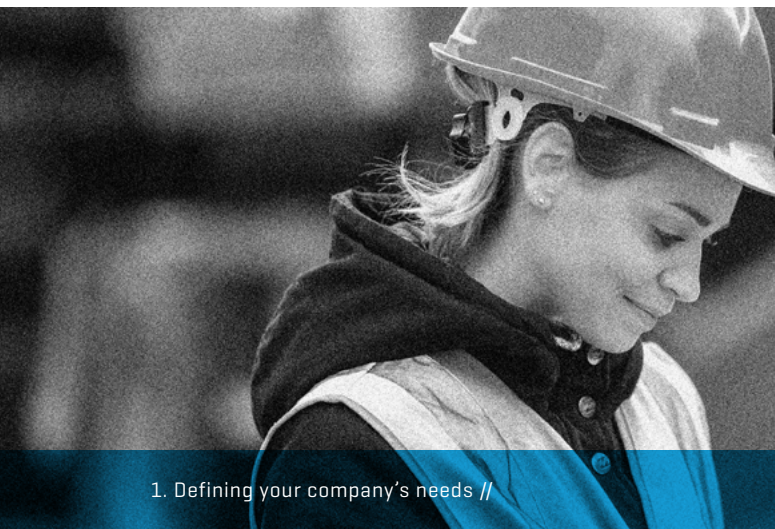
## WHAT'S THE BIGGEST GOAL YOU WANT TO ACHIEVE BY ONBOARDING CONSTRUCTION SOFTWARE TO YOUR COMPANY?

[eg. Manage and control job costs in real-time]

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WHAT ARE SOME NON-NEGOTIABLE FEATURES YOU KNOW YOU NEED AND WHY?

Feature	Why

WHO WILL USE THIS SOFTWARE?

Name	Job Title	Purpose

WHAT IMPROVEMENTS WILL YOUR COMPANY EXPERIENCE IF YOU FIND AND ONBOARD THE RIGHT SOFTWARE SOLUTION?

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## 2. UNDERSTANDING THE BASICS OF CONSTRUCTION SOFTWARE //

*There are a number of basic core considerations you need to make when looking into any software solution regardless of what industry you're in. These considerations need to be taken into account early on and you'll likely need assistance from your internal resources to ensure these meet your company's guidelines and policies.*

### ACCESS

How your team will access the system is very important. For most construction software solutions you'll find there are two options. Cloud vs On-premise systems. This table provides insight into both.

Cloud	
Pros	Cons
<ul style="list-style-type: none"><li>· Doesn't require your own server on site</li><li>· No VPN connections back into head office</li><li>· No need to install software</li><li>· Can access any machine in the world with a web browser</li><li>· Secured by SSL encryption</li><li>· Backups taken regularly</li><li>· Does not require an on-site technician to keep the server working</li></ul>	<ul style="list-style-type: none"><li>· Internet speed impacts user experience</li></ul>



On-premise Server	
Pros	Cons
<ul style="list-style-type: none"> <li>· Data is stored on premises</li> <li>· You have physical control over server hardware</li> </ul>	<ul style="list-style-type: none"> <li>· Need a dedicated IT support person</li> <li>· Requires large capital investment and ongoing costs</li> <li>· No uptime guarantees</li> <li>· More prone to data-loss</li> <li>· Generally access needs to be from a local computer</li> </ul>

## DATA SECURITY

Your data's security is paramount and should be a large consideration for your choice in software. When researching a preferred software vendor and specifically when considering data security, it's generally always more cost effective to go with a cloud provider.

This is because if you have your own server and a full time IT staff, the unique skills of cyber warfare and security experts are often difficult and costly to maintain.

Cloud-based platforms usually have large companies behind them guaranteeing online security and safety (you can learn more about security for cloud-based construction software in [this article](#)).

## ACCESS AND PERMISSION

Not everyone in the office needs to see how much profit you made this quarter and what your projections are for next. This is where the need for access and permissions comes in.

When you implement a construction software solution in your business, you need to consider who needs to have access to what areas and who doesn't. Great software will let you select and design your user access and permissions to suit your company's unique needs.

For example, you should be allowed to give project managers access to the project management functions of the system, while limiting their access to sensitive data like HR and payroll.

## USER EXPERIENCE AND TERMINOLOGY

Every industry and country has their own terms and nuances. It might not seem like a huge deal, but if you're working in a system that uses terms you and your team do not understand it can be frustrating.

Look out for software that's supported and built in Australia and uses Australian terminology. An example of this is the term variation. American systems will use the word change orders.



## COMPLIANCE

Finding software with features that allow you to easily comply with Australian law is an added bonus.

For example, Viewpoint's Jobpac solution allows for industry legislative reporting, such as;

- Direct Single Touch Payroll connection to the ATO;
- Payday Filing;
- Project Bank Accounts;
- The Building Industry Fairness (BIF) act;
- Subcontractor Retention Held in Trust; and,
- Revenue recognition compliance.

## ONBOARDING AND SUPPORT

Onboarding and support is vital for the success of your software implementation. While some software companies give you the ability to tweak and customise your setup to fit your business perfectly, this can quickly get out of hand or become an overwhelming job when you're not sure where to start.

Look out for a company that will support you and your goals and that has years of experience with implementing solutions like this for other

companies similar to yours. They will stand out because they will:

- Have a defined setup process
- Offer 24/7 technical support
- Provide you with a dedicated account manager


## COST

Different software companies charge in different ways:

- Some will charge you on a monthly basis per user. If you have a large team, this is something that needs to be taken into consideration.
- Others will charge a yearly licence fee with unlimited users. If you have a large team, this might be a bigger outlay in the beginning, but cost you less in the long run.
- In addition to this, you need to consider the cost over the the duration of the contract you're locked into.

When looking into costs, it's important to remember that this software will be depended on to give you the insights necessary to profitably run your business. Going with the cheapest option isn't always the best idea.



A dark, blue-tinted photograph of a person's hands writing in a notebook with a pen. The person is wearing a light-colored shirt. The background is dark and out of focus. The text is centered in the middle of the image, flanked by two horizontal white lines.

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Look out for a company  
that will support you and  
your goals and that has  
years of experience with  
implementing solutions...

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### 3. KNOWING WHICH FEATURES TO LOOK FOR //

*There are very different complexities of construction software on the market. A well-rounded system with features that will impact all areas of your business and remove double data entry and other frustrating tasks is the way of the future. This section will provide you with an understanding of the capabilities a good system will offer.*

#### COMPREHENSIVE ACCOUNTING

A well thought-out system will offer you support for all construction processes and industry legislative reporting. For example, it should make it simple to report on subcontractor payment to the Australian Taxation Office. You can also expect the system to give you:

- Your basic reports such as profit and loss, balance sheets, trial balance and trading summary.
- A general ledger model that can support your intercompany transactions and hierarchical reporting across different business units and entities.
- Integrated contract valuation capabilities which results in automatically generated work in progress [WIP] accounting entries.
- In addition to this, great software can be customised and tailored to pull any report needed to support your business' accounting needs.

#### FORECASTING AND CASH FLOW CAPABILITIES

The system's forecasting capabilities should help you gain key operational financial indicators within a group or any company organisational structure. It should also enable you to manage project costs, such as revenue, risk and cash flow forecasting.

In addition, you can even expect to discover historical project performance and financial analysis



throughout the entire lifecycle of all your projects – from tender to completion. A good system will enable you to see this data and then change processes and quotes to improve future profit margins.

## PROJECT COSTING AND MANAGEMENT

A fully integrated accounting and project management software will update in real time, making it simple to manage job costs, subcontractors, variations, claims and procurement, all from the one place.

The system should

- help you easily create projects, budgets and schedules,
- show you real-time job analysis and committed and projected cost reporting, and
- help you to easily stay on top of forecasted costs and margins.

## COMPREHENSIVE PAYROLL AND HR

As the best systems run off real-time ledgers, many of your business' processes can be handled from the one system. This includes tracking timesheets, labour costs and managing human resources.

In addition, some systems offer a flexible allowance schedule. A comprehensive system will also offer modules that can assist with recruitment, keep track of staff development, training, safety obligation and appraisals.

In terms of compliance, using a system that's been designed specifically for the Australian and New Zealand markets allows you to comply with legislation around monitoring and controlling your labour costs.

## ASSET AND PLANT MANAGEMENT

Integrated construction software systems also offer asset and plant management capabilities. This means assets can be tracked from acquisition to disposal.

A strong system will provide you with tools to calculate asset accounting, depreciation, finance and operating leases. You will be able to track asset profitability and location, and have complete control over repair and maintenance costing and billing.

## AD-HOC QUERY AND REPORT WRITING

Often in your role you'll need to quickly pull a report about something very specific and an integrated software solutions will enable you to do so.

You should be able to drill down into anything, in real time and easily in your system. You should also have the capability to export it as an Excel spreadsheet to enable you to edit and configure data if you desire.

## INTEGRATION SUPPORT

While it's incredible to have all the above features in one solution, sometimes you need extra functionality here and there. That's why considering a solution's integration capabilities is critical. A solution that can be flexible and integrate with other products to improve your system can help you get extra data in real time.

For example, some systems include integrations to support data being collected directly from job sites. This data might include timesheets, defects, NCRs, PO requisitions and delivery dockets. Ask your sales representative what their software's integration capabilities are to get a complete picture of what's possible.

## 4. DOTTING THE I'S AND CROSSING THE T'S //

*At the end of this buyer's guide we've provided you with a handy checklist to help you evaluate your top 3 vendor's product features. After you've compared apples with apples, you need to take a few more steps before settling on a final choice.*

### SCHEDULE A DEMO

Because you've worked through this document you will have a good idea of exactly what you want from the software. Good software companies will have reps who will walk you through a demo and show you specifically how their solution can solve your problems.

Typically, these last for 30 minutes where the rep will show you a very small snippet of what the software can do, but it should give you peace of mind that the software can deliver what your company needs. It's recommended to outline to the rep, in advance, the top two things you want to see demonstrated on the call. This way it should be easy to decide if it's going to be the best choice for your company.

### ASK FOR CASE STUDIES AND TESTIMONIALS

Case studies and testimonials provide insight into customers that this software solution has worked for. They help you to understand that the vendor has good policies and procedures to get the software up and running in a fully functioning business - you never want to be the guinea pig! Plus, you'll get insight into the brands the vendor is already working with.

### ASK FOR REFERENCES

If you've nailed it down to your top three vendors ask the contact at the company you're speaking to for references. You want to understand how easy the product is to use in practice and what pros and cons they've personally experienced. If the company's unwilling to provide a reference, be wary!

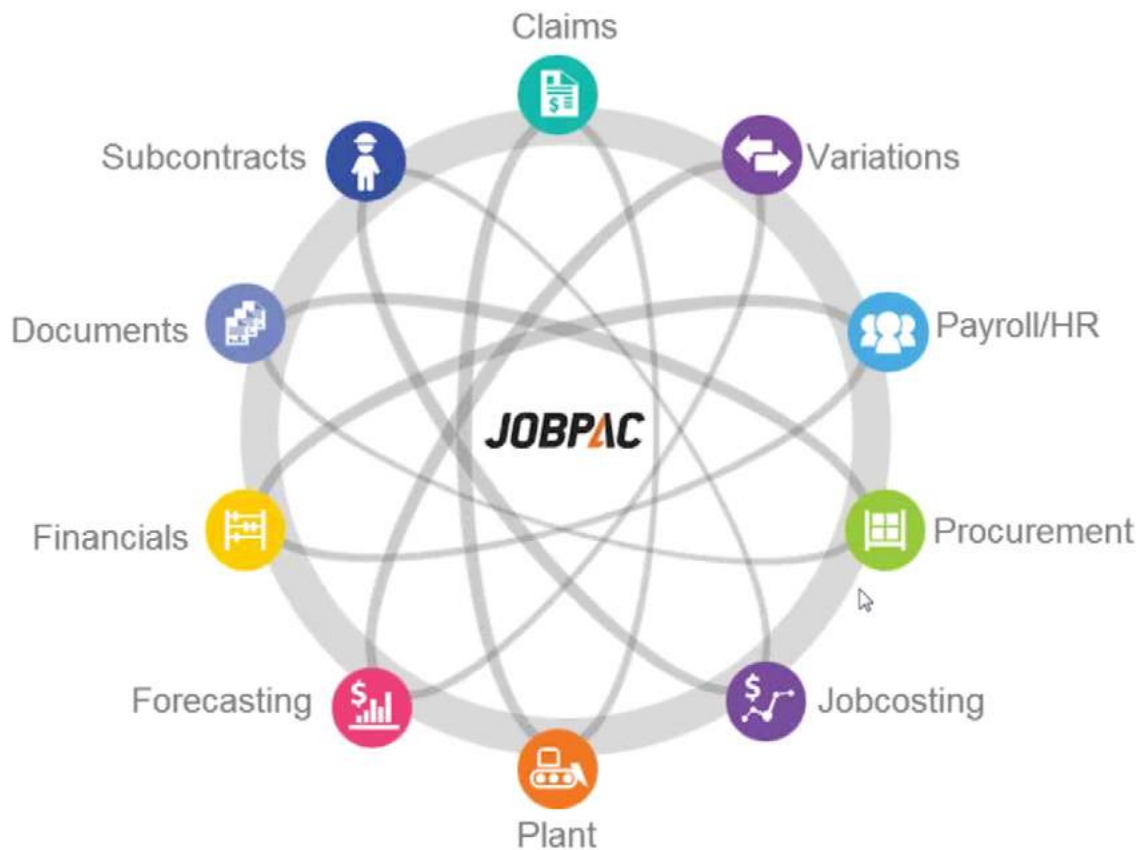


## 5. WHY JOBPAC CONNECT //

If you're looking at construction software, we'd love to throw our hat in the ring.

Jobpac Connect is a construction software solution for commercial, industrial, and civil contractors to connect forecasting to financial, project, and operations for improved visibility and business capabilities. We're Australia and New Zealand's number one choice and help companies manage more than AU\$97+ billion in projects.

We've been trusted by Australian construction companies for 20+ years. Our solution can do everything your construction company needs and more.



To discuss whether Jobpac Connect is the best solution for your business, contact our team on +61 2 9492 4100.



Alternatively, [click here](#) to organise a demo to show you how Jobpac Connect will change your business' for the better.



We've been trusted by  
Australian construction  
companies for 20+ years.

Our solution can do  
everything your construction  
company needs and more.





## 6. CONSTRUCTION SOFTWARE FEATURES COMPARISON CHECKLIST //




Detailed list of features	Jobpac	Vendor 2	Vendor 3
<b>Financial management</b>			
<p><b>General ledger</b></p> <ul style="list-style-type: none"> <li>· General and GST journals</li> <li>· Optional centralised chart of accounts</li> <li>· Optional centralised treasury</li> <li>· Consolidations</li> <li>· Journal upload from spreadsheets</li> <li>· Single or consolidated trial balance</li> <li>· Single or consolidated P&amp;L balance sheets</li> <li>· Full integration to job costing</li> <li>· Automatic inter-company accounting</li> <li>· Full GST and BAS reporting</li> <li>· Credit card interface</li> <li>· Current budgets</li> <li>· Next year budgets</li> <li>· Monthly budgets.</li> </ul>			
<p><b>Accounts payable</b></p> <ul style="list-style-type: none"> <li>· Storing and access of scanned creditor invoices</li> <li>· Optional centralised creditors and subcontractors</li> <li>· Flexible payment options</li> <li>· Cash management</li> <li>· Statements</li> <li>· Trial balance</li> <li>· Payment by cheque/EFT</li> <li>· Direct emailed remittance advices</li> <li>· Banking interfaces</li> <li>· Stop payment options.</li> </ul>			













<p><b>E-Invoicing</b></p> <ul style="list-style-type: none"> <li>· Electronic authorisation of claims and invoices</li> <li>· Scanning and online viewing of supplier invoices &amp; subcontract claims</li> <li>· 3-way matching with orders, deliveries and invoices</li> <li>· Paperless authorisation</li> <li>· Central or distributed authorisation options</li> <li>· Distributed invoice costing allocations</li> <li>· Electronic upload of suppliers invoices.</li> </ul>			
<p><b>Accounts receivable</b></p> <ul style="list-style-type: none"> <li>· Progress claims and sundry invoices</li> <li>· Progress claims certifications</li> <li>· Optional centralised debtors</li> <li>· Debtor notes and actions</li> <li>· Cash forecasting</li> <li>· Multiple invoice formats</li> <li>· Unallocated cash</li> <li>· Debtor collection support</li> <li>· Integrated to progress claim module</li> <li>· Automatic accrual options.</li> </ul>			
<p><b>Bank reconciliation</b></p> <ul style="list-style-type: none"> <li>· Banking uploads</li> <li>· Integrated with accounts payable and receivables</li> <li>· Tick and click bank reconciliation.</li> </ul>			
<p><b>Interest charging options</b></p> <ul style="list-style-type: none"> <li>· Nominal or actuals interest charging to projects</li> <li>· Calculated daily</li> <li>· Variable rates dependent on overdraft or surplus position</li> <li>· Automatic overnight application to projects.</li> </ul>			

<b>Schedule of rates processing</b> <ul style="list-style-type: none"> <li>· Item based</li> <li>· Earned value</li> <li>· Parent items</li> <li>· Choice of forecasting methodology</li> <li>· Preliminaries management.</li> </ul>	✓		
<b>Business forecasting</b>			
<b>Contract Valuation Management</b>	✓		
<b>Forecast Management</b> <ul style="list-style-type: none"> <li>· Online forecasting</li> <li>· Detailed resource forecasting</li> <li>· Contingency provisions</li> <li>· Period based forecasting</li> <li>· Full audit of monthly forecast</li> <li>· Integration with actual and committed costs</li> <li>· Multiple forecasting methodologies</li> <li>· Review options</li> <li>· Forecasting by cost centre or head contract pay items.</li> </ul>	✓		
<b>Project costing &amp; Management</b>			
<b>Job costing</b>	✓		
<b>Procurement</b>	✓		
<ul style="list-style-type: none"> <li>· Materials</li> <li>· Subcontract management</li> <li>· <i>Lump sum</i></li> <li>· <i>SOR subcontracts</i></li> <li>· <i>Work dockets</i></li> </ul>	✓		

<ul style="list-style-type: none"> <li>· Insurances</li> <li>· Retention</li> <li>· Bank guarantees</li> <li>· RCTIs</li> <li>· Cover sheet printing</li> <li>· Quantity &amp; lump sum online authorisation</li> <li>· Security of payment compliance</li> <li>· Head contract and internal variation integration</li> <li>· Online viewing of subcontractor invoices</li> <li>· Upload of subcontract claim details</li> <li>· Automatic links to selected on-line claim systems</li> <li>· Automatic printing of payment schedules</li> <li>· Links to head contract pay items.</li>   <li>· Plant</li> </ul>	 contin'd		
<b>Variations</b>			
<b>Head Contract Progress Claims</b> <ul style="list-style-type: none"> <li>· Lump sum claims</li> <li>· Cost plus claims</li> <li>· Schedule of rate claims</li> <li>· Can be linked to project work breakdown structure for valuations</li> <li>· Various reporting layout options</li> <li>· Percentage, quantity or amount based claims</li> <li>· Materials on/off site</li> <li>· Escalation claims</li> <li>· Certification facility.</li> </ul>			
<b>Service Orders</b> <ul style="list-style-type: none"> <li>· Integrated management of Service Orders</li> <li>· Activities</li> <li>· Resources</li> <li>· Links to projects</li> <li>· Cost plus lump sum</li> <li>· Automatic invoicing</li> </ul>			

<ul style="list-style-type: none"> <li>· Extensive costing options</li> <li>· Maintenance contracts</li> <li>· Approval processes</li> <li>· Multiple status'</li> <li>· Billing rates and mark ups</li> <li>· Fixed price</li> <li>· Profit and loss reporting.</li> </ul>	 contin'd		
<p><b>Forecasting</b></p> <ul style="list-style-type: none"> <li>· Activity-based timeline</li> <li>· Monthly financial performance history and forecasts</li> <li>· Time phased cost budget baseline</li> <li>· Project by project basis at cost centre level with consolidation to company position.</li> </ul>			
<b>Operational management</b>			
<p><b>HR</b></p> <ul style="list-style-type: none"> <li>· Position management</li> <li>· Business unit and/or project focused</li> <li>· Competency tracking</li> <li>· Qualification/general training records</li> <li>· Expiry &amp; renewal reporting</li> <li>· Professional development tracking</li> <li>· Appraisals</li> <li>· Training history by employee</li> <li>· Training planning</li> <li>· Cost of training</li> <li>· Excel downloads of data</li> <li>· Extensive filtering of data</li> <li>· Recruitment management including registering of applicants</li> <li>· Vacant position monitoring</li> <li>· Application and recruiting stages</li> <li>· Reference recording</li> <li>· Management of equipment issues to employees</li> <li>· Safety incident register to ANZ standards</li> <li>· Lost injury recording</li> <li>· LTI rates</li> <li>· Personnel data update by employees</li> <li>· Extensive security.</li> </ul>			

<p><b>Payroll</b></p> <ul style="list-style-type: none"> <li>· Integrated payroll linked to Job Costing</li> <li>· Multiple costing options</li> <li>· Online user timesheet entry and approvals</li> <li>· Automatic Leave accrual</li> <li>· On costing</li> <li>· Billing rates</li> <li>· Subcontract time sheets and costings</li> <li>· Flexible allowances</li> <li>· Email payslips</li> <li>· Multiple bank accounts</li> </ul>			
<p><b>Document control</b></p> <p><i>Direct user definition and management of 3rd party document control application links, paths, security and integration control.</i></p>			
<p><b>Asset and Plant</b></p> <ul style="list-style-type: none"> <li>· Integrated management of fixed assets</li> <li>· Asset accounting depreciation</li> <li>· Amortisation</li> <li>· Finance and operating leases</li> <li>· Classification driven</li> <li>· Acquisition and Disposals</li> <li>· Repair and maintenance costing</li> <li>· Extensive enquiry facilities</li> <li>· Internal billing to projects and business units</li> <li>· Period based reporting</li> <li>· Plant time sheets</li> <li>· Registration details</li> <li>· Usage recording</li> <li>· Full integration with general ledger and job costing.</li> </ul>			
<p><b>Stores Inventory Control</b></p> <ul style="list-style-type: none"> <li>· Integrated management of inventory</li> <li>· Multiple warehouses</li> <li>· Multiple inventory categories</li> <li>· Classification and sub-classifications</li> <li>· Stock issues to projects</li> <li>· Extensive enquiry</li> </ul>			

<b>Warehouse locations</b> <ul style="list-style-type: none"> <li>· Billing rates</li> <li>· Average rate</li> <li>· Integration to procurement</li> <li>· Reconciliation to general ledger.</li> </ul>	 contin'd		
<b>Estimate Interface</b> <ul style="list-style-type: none"> <li>· Interface with Buildsoft</li> <li>· Interface with Candy</li> <li>· Interface with Expert Estimation</li> <li>· Interfaces with any estimating packages via spreadsheets.</li> </ul>			
<b>Reporting &amp; Analytics</b>			
<b>Forms</b> <ul style="list-style-type: none"> <li>· Output management solution</li> <li>· View, print, and distribute standardised or customised forms including tax invoices, remittances, purchase orders, subcontract authorisations and more</li> <li>· Brand forms with logos</li> <li>· Format forms to your graphic design guidelines.</li> </ul>			
<b>Upload and download</b> <ul style="list-style-type: none"> <li>· Integration with Excel</li> <li>· Jobpac security and data validation intact.</li> </ul>			
<b>Ad-Hoc reporting</b> <ul style="list-style-type: none"> <li>· Generate reports using SAP CrystalReports</li> <li>· Ad-hoc Query and Analysis.</li> </ul>			
<b>Dashboards</b> <ul style="list-style-type: none"> <li>· Role-based</li> <li>· Personalised to the user</li> <li>· Reports, graphs, lists, shortcuts, RSS feeds</li> <li>· Alerts</li> <li>· Favourite tabs.</li> </ul>			

<b>Business intelligence</b> <ul style="list-style-type: none"> <li>Views, reports, lists, graphs, dashboards, alarms</li> <li>Offline Analysis Tools</li> <li>Mobile BI</li> <li>Live Office [Microsoft integration]</li> <li>Scheduling and Publications.</li> </ul>	✓		
<b>Business view - warehouse</b> <ul style="list-style-type: none"> <li>Business logic layer mapped to business warehouse</li> <li>Single cohesive business model</li> <li>Extract and consolidate data across databases.</li> </ul>	✓		
<b>Web-enabled</b>			
<b>User interface</b> Modern, easy to learn and use Access anywhere, anytime on any device Drag and drop Personalise screens Grids Exploits industry standards. Full integration and security Favourites, alerts, tabs, RSS feeds.	✓		
<b>Upload and download</b> <ul style="list-style-type: none"> <li>Integration with Excel</li> <li>Jobpac security and data validation intact.</li> </ul>	✓		
24/7 access via web browser	✓		
Helpdesk and technical support	✓		