Construction SuiteApp

There are many roles at play in the Construction industry, each carrying their own level of nuance. Understanding the role, or roles, a company plays is valuable in understanding it's prospective NetSuite footprint with BPM Caravel's Construction SuiteApp.

Within the Construction Industry, there are many sub-verticals or sub-industries, each of which has varying priorities within the typical process for operating their business. Below is a breakdown of common sub-verticals as well as their priorities.

Sub-Verticals

GENERAL CONTRACTOR	**SUBCONTRACTOR**	**RESIDENTIAL HOME BUILDERS**	**REAL ESTATE DEVELOPER**
ARCHITECTURE, ENGINEERING, & CONSULTING	**RENEWABLE ENERGY**	**OPERATIONS & MAINTENANCE**	**IT INFRASTRUCTURE**

Priorities by Sub-Vertical

SUB-INDUSTRIES

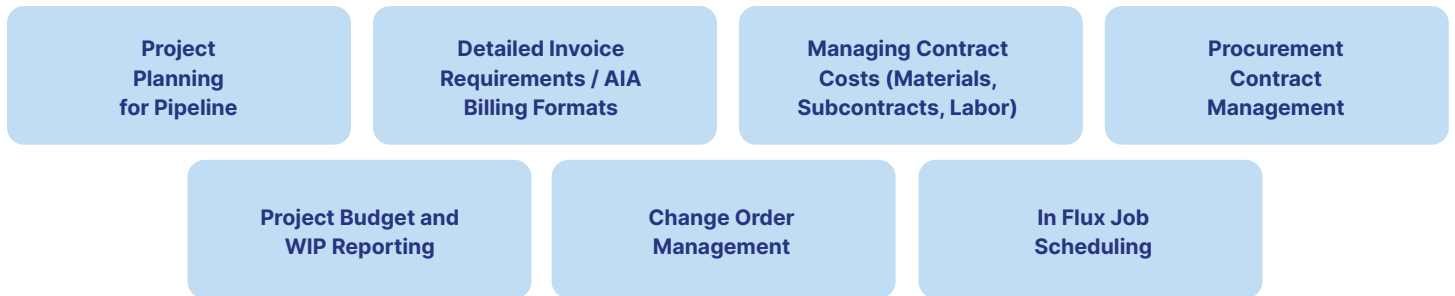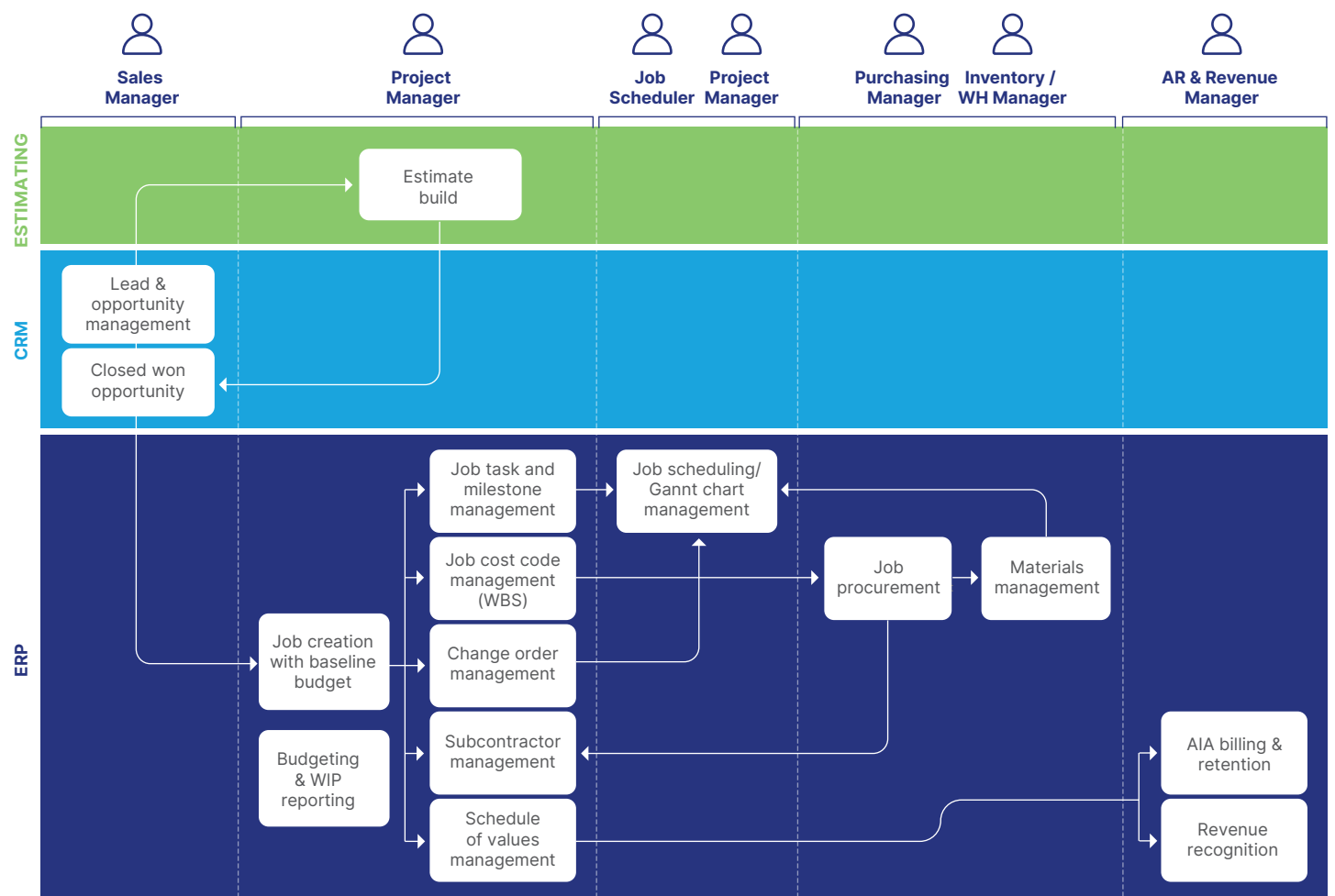|	General Contractor	Subcontractor	Home Builders	Real Estate Developer	Architecture, Engineering, & Consulting	Renewable Energy	Operations & Maintenance	IT Infrastructure
Job Costing	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Schedule of Values	Yes	No	Yes	No	No	Sometimes	No	Sometimes
Job Budgeting	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Estimating	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes
Job-Based Procurement	Yes	Sometimes	Yes	No	Sometimes	Yes	Yes	Yes
AIA / Percent Complete Billing	Yes	No	Yes	No	No	Sometimes	No	Sometimes
Progress Billing	No	Sometimes	Sometimes	No	Yes	Yes	No	Sometimes
WIP Reporting	Yes	Sometimes	Yes	No	Yes	Sometimes	Sometimes	Sometimes
Change Order Management	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Retention	Yes	Yes	Yes	No	Sometimes	Sometimes	Sometimes	Sometimes
Resource Scheduling	Yes	Sometimes	Yes	No	Yes	Yes	Yes	Sometimes
Gantt Charting	Yes	Sometimes	Yes	No	Yes	Yes	Yes	Sometimes

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Personas

Within a Construction company, the below personas are typically involved in Construction-related activities. Each persona plays its own role in the success of a Construction job.

CDO / VP Finance / Controller	Sales Manager	Purchasing Manager	Inventory / WH Manager	Project Manager	Job Scheduler	AR & Revenue Manager	Compliance & IT

These personas work together to solve for the below business challenges:

Project Planning for Pipeline	Detailed Invoice Requirements / AIA Billing Formats	Managing Contract Costs (Materials, Subcontracts, Labor)	Procurement Contract Management

Project Budget and WIP Reporting	Change Order Management	In Flux Job Scheduling

And to do so, below is a typical process for construction companies as it relates to their ERP system:

Sales Manager — Project Manager — Job Scheduler — Project Manager — Purchasing Manager — Inventory / WH Manager — AR & Revenue Manager

ESTIMATING
- Estimate build

CRM
- Lead & opportunity management
- Closed won opportunity

ERP
- Job creation with baseline budget
- Budgeting & WIP reporting
- Job task and milestone management
- Job cost code management (WBS)
- Change order management
- Subcontractor management
- Schedule of values management
- Job scheduling/ Gannt chart management
- Job procurement
- Materials management
- AIA billing & retention
- Revenue recognition

So, what is BPM Caravel's Construction SuiteApp and what does it cover?
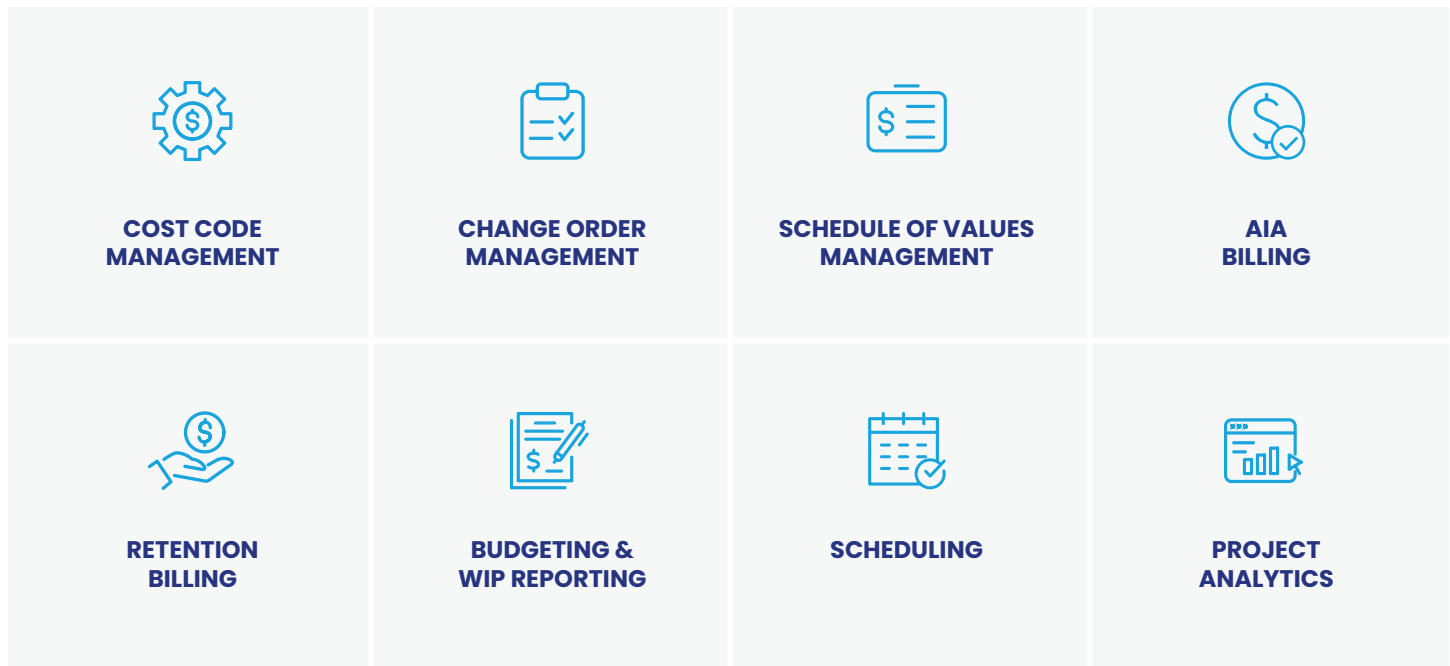
BPM Caravel's Construction SuiteApp augments NetSuite's SuiteProjects and CRM functionality by providing:

- A Job-Specific BOM Purchasing Page that allows Project Managers to easily Procure Labor and Materials for any stage of a project.
- A Schedule of Values that drives AIA Certified Billing and Revenue Recognition.
- An Automated Retention Release Process.
- A Change Order Approval Workflow that ties back to the Schedule of Values and Budget Comparison Reports.
- A Labor & Equipment Scheduler with Calendar Views to plan out work tasks.
- A Project Dashboarding and Reports page that includes detailed WIP and Budget Comparison Reports.

With the above functionality, Caravel's SuiteApp is particularly useful for the below sub-verticals:

GENERAL CONTRACTOR	SUBCONTRACTOR	RESIDENTIAL HOME BUILDERS	RENEWABLE ENERGY	IT INFRASTRUCTURE

Such organizations use Caravel's SuiteApp for the below Construction Requirement Areas:

COST CODE MANAGEMENT	CHANGE ORDER MANAGEMENT	SCHEDULE OF VALUES MANAGEMENT	AIA BILLING
RETENTION BILLING	BUDGETING & WIP REPORTING	SCHEDULING	PROJECT ANALYTICS

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And the reasons are many! But the primary benefits for leveraging Caravel's Construction SuiteApp are:

1. **SuiteApp:** Caravel's Solution is a Certified SuiteApp on NetSuite's SuiteApp Marketplace

2. **Certified by AIA:** Caravel's AIA Invoice PDF is Certified and Signed Off On by the American Institute of Architects (AIA)

3. **Native Core:** Caravel's Solution is built on Native NetSuite Modules (i.e., SuiteProjects), which allows for better use of the core NetSuite product for reporting and other functions. As NetSuite enhances SuiteProjects, Caravel's solution will align with the enhancements.

4. **No Licensing Fee:** Caravel's Construction SuiteApp does not have a licensing fee. Caravel only charges for a one-time implementation.

5. **Other Solutions:** Caravel's SuiteApp supports an integration with Procore, and Caravel has a pre-built Boomi template for a NetSuite <> Procore integration.

Augment NetSuite's SuiteProjects and CRM functionality with Caravel's Construction SuiteApp

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Why Companies Choose Caravel

The automation of data migration has played a pivotal role in the success of Caravel's NetSuite implementations by streamlining and enhancing the transfer of data from legacy systems to the NetSuite. The Data Migration Platform has not only allowed for an efficient process but has minimized the risk of errors that can occur during a manual data migration process.

| FULL-SERVICE FIRM. | EXPERTISE. | TEAM. |

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»»»»»»» 2021 ««««««
VERTICAL ALLIANCE OF THE YEAR
SERVICES

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REGIONAL ALLIANCE OF
THE YEAR - NORTH AMERICA

About Caravel

Caravel has served more than 500 clients over the past decade, providing a comprehensive range of services, including accounting, strategy, business processes and technology selection. Our commitment to excellence drives us to continually improve and refine our approach, helping our clients solve complex problems with modern tools.

Caravel is proud to be a part of the technology services group of BPM LLP, a top 40 accounting and advisory firm. With our team by your side, you can unlock your business's true potential and drive success in an ever-evolving marketplace.

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