MILESTONE
INFORMATION SOLUTIONS

BUILD SMARTER:

A Real-World Guide to Fixing Construction's Financial Headaches

THE BIG PICTURE

Every challenge in this guide connects back to one thing: clarity. Finance teams need fast, accurate, real-time information to do their jobs well — and that only happens when systems talk to each other, processes are streamlined, and everyone works from the same set of numbers.

A modern, cloud-based ERP system can do all of that (and more). Acumatica Cloud ERP offers a full-scale ERP, with a custom suite of features just for the construction industry. Acumatica Construction Edition brings together accounting, job costing, approvals, compliance, billing, and more into one connected platform. That means fewer workarounds, fewer late nights, and more confidence in the numbers you share with leadership.

When finance has visibility, the entire business runs smarter.

A Real-World Guide to Fixing Construction's Financial Headaches

CONTENTS

PAIN POINT #1:
Disconnected Systems and Data Silos

Your systems don't talk — and finance feels the fallout.

Data lives in multiple places, often in platforms that weren't built to work together. Finance, field, and operations are stuck in silos. Project updates lag behind. Reporting means stitching together spreadsheets from three different tools. And by the time you get a clear picture of job costs or margins, it's too late to act on it.

The Challenge

You're working across disconnected systems — and finance feels the fallout. You're stitching together data manually across tools that don't talk to each other, slowing down reporting and introducing risk across the board. When systems don't align, accounting pays the price in late nights and version control chaos.

How Acumatica Helps

Acumatica connects job costs, accounting, HR/payroll, billing, and more into one cloud-based platform. Teams can enter and access real-time data in one place, reducing duplication and errors. With a unified platform, your team can work more efficiently, reduce redundant tasks, and gain visibility into real-time project financials so you can make better decisions. Finance gets a complete, up-to-date view of the business.

How Milestone Makes It Work

When your systems don't talk to each other, your finance team ends up doing the heavy lifting. We work with you to map out how data should move across your business — from the field to the back office — and configure Acumatica so everything connects the way it should. That means less cleanup, fewer surprises, and clear visibility across the business.

> " With a unified platform, your team can work more efficiently, reduce redundant tasks, and gain visibility into real-time project financials so you can make better decisions.

Pain Point #2:
Outdated Software That Can't Keep Up

Old systems weren't built for today's challenges.

Many construction companies are still relying on outdated software — systems that were never designed for modern compliance, integrations, or even remote access.

We often hear from companies where the systems in place were good enough for a long time — until they weren't. As the company grows or new regulations come in, finance is left to patch things together. Getting a clean financial report becomes a huge effort.

The Challenge

Legacy systems might get the job done — but at what cost? Outdated software often means missing features, slow performance, poor integrations, and limited visibility. It holds your team back and makes it harder to grow.

How Acumatica Helps

Acumatica is a true cloud ERP that keeps your technology current without expensive upgrades. It's modern, flexible, and continuously updated so you can take advantage of new features and improvements without disrupting your business.

How Milestone Makes It Work

We've helped dozens of companies migrate from outdated systems to Acumatica with minimal disruption. We take the time to understand what your old system did well (and what it didn't), and we bring over what matters while helping you leave the rest behind. Our team ensures the transition is smooth, the training is clear, and your team is set up to move forward.

"You shouldn't need three systems and two workarounds just to close the month. Acumatica simplifies it all in one place."

PAIN POINT #3:
LACK OF REAL-TIME VISIBILITY

You're always looking at yesterday's numbers.

The Challenge

By the time you spot a problem, it's already impacted your margins. Without real-time visibility into your operations and financials, your team is stuck looking backward — and your leadership is flying blind.

How Acumatica Helps

Acumatica delivers real-time dashboards and customizable reports that pull data across jobs, departments, and business units. Whether you're in the office or on the jobsite, you get a current, accurate view of what's happening — not just what happened last month.

How Milestone Makes It Work

We build dashboards that are actually useful — tailored to what your team needs to see and how they work. Whether it's executive-level insights or project-level details, we make sure the data is clean, timely, and presented in a way your team will actually use. No more digging. No more waiting.

PAIN POINT #4: Too Many Manual Processes

With every manual step, there is a chance for something to go wrong — and the consequences hit finance first.

The Challenge

Manual data entry eats up time and increases risk. Whether it's coding invoices, updating spreadsheets, or transferring numbers between systems, every manual step is a chance for something to go wrong — and the consequences hit finance first.

How Acumatica Helps

With Acumatica, you can automate repetitive tasks and eliminate double entry. Teams can enter data from mobile devices, job costs are posted in real time, and workflows are built to reduce manual effort across departments. Less busywork, fewer errors, and faster month-end close.

How Milestone Makes It Work

We help you pinpoint the manual tasks that are holding your team back — and then build smart automation into your system where it matters most. From AP approvals to materials tracking, we make sure your Acumatica setup is more than just a system — it's a smoother way to work. And when your workflows change, we're here to adapt them with you.

Less busywork, fewer errors, and faster month-end close.

"
Stronger billing processes mean better cash flow, more accurate forecasts, and fewer surprises at the end of the month.
"

PAIN POINT #5:
Delayed Billing and Payments

When billing is delayed, cash flow takes the hit.
If invoices aren't tied to job progress, or if billing relies on manual processes, it's easy to miss deadlines, under-bill, or create confusion with clients.

The Challenge

We've worked with contractors who were growing fast — but their billing processes couldn't keep up. Finance teams were stuck chasing updates, double-checking numbers, and scrambling to hit deadlines with tools that didn't scale. Payments were delayed, clients got frustrated, and forecasting turned into guesswork.

How Acumatica Helps

Acumatica delivers real-time dashboards and automates billing based on work completed or milestones met. It tracks project progress, change orders, and contract terms so invoices go out on time — and payments come in faster.

How Milestone Makes It Work

Software alone doesn't fix the problem — how it's set up and used day to day is what really matters. We start by looking at what's not working today — the missed handoffs, the extra steps, the things that slow your team down. Then we build the workflows around how your team works, and improve them so they're easier, faster, and more efficient for the way your business runs.

PAIN POINT #6: Reporting is slow and inaccurate

If you're the one responsible for keeping other business leaders informed, you need the information easy to access and understand.

The Challenge

When reporting depends on pulling numbers from multiple places, it's hard to trust the data — and even harder to make decisions. Finance is stuck pulling last-minute reports, and leadership doesn't have the visibility they need.

How Acumatica Helps

Acumatica centralizes your data and gives you powerful reporting tools that pull directly from your live system. Dashboards and financial reports are always current, reducing the time spent compiling and validating information.
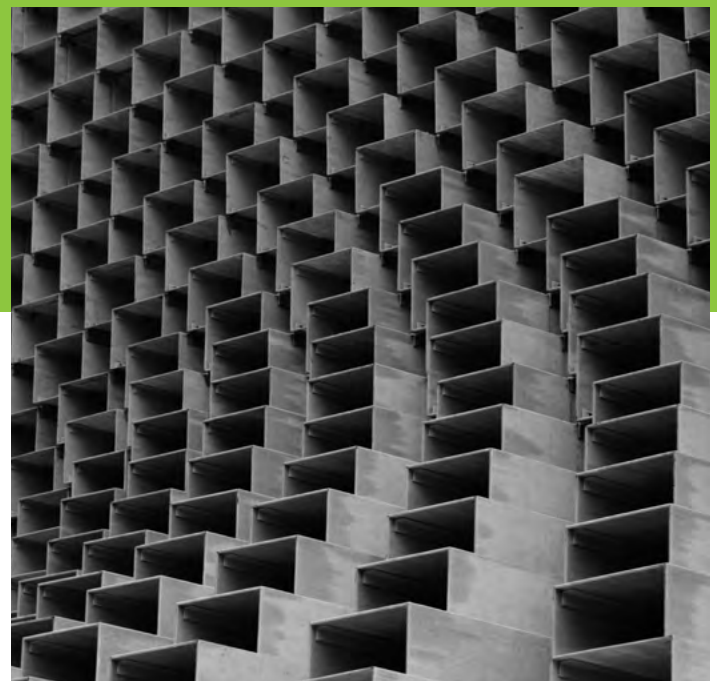
How Milestone Makes It Work

We help you design reports that match how your team actually looks at the business. Whether it's job-level profitability, company-wide P&Ls, or exception-based dashboards, we tailor the reports to match what your team needs to see — and teach you how to build more on your own.

PAIN POINT #7:
Unclear Job Costs

Uncertainty across job sites puts your business at risk.

Managing multiple jobs across countless sites without real-time visibility can lead to delays, cost overruns, and inaccurate job costing. Finance teams end up reacting to errors after the fact — not because they missed something, but because the data just wasn't there.

The Challenge

Without real-time job cost data, it's hard to know where things stand — and nearly impossible to catch issues before they snowball. Teams are left reacting instead of planning, and finance is constantly trying to clean up after the fact.

How Acumatica Helps

Acumatica's job cost accounting tools give you detailed visibility into labor, materials, equipment, subcontractors, and overhead. You can break down costs by project, phase, task, or cost code — and know where you stand before it's too late to course-correct.

How Milestone Makes It Work

We go beyond setup. We help you define the right cost codes, structure your jobs correctly, and connect the field and the back office so the numbers reflect what's really happening. Our team will help you build a system that gives you the clarity you've been missing.

> "
> Reduce waste, lower costs, and avoid project delays. With better visibility and control over each job, you keep projects moving smoothly and stay within budget.

PAIN POINT #8: Lack of Integration

Your tools are powerful — but not if they don't work together.

The Challenge

Your systems don't connect, and your team spends more time transferring data than acting on it. Whether it's field reports, materials tracking, or job costing, nothing flows automatically, and finance is always chasing updates.

How Acumatica Helps

Acumatica is built with open APIs and flexible integration options, making it easy to connect with other software platforms, mobile apps, and third-party tools. You can streamline data flows and reduce duplication across the board.

"With Acumatica's flexible, scalable platform, you future-proof your business and ensure that you can stay competitive by leveraging the latest technology without major headaches."

How Milestone Makes It Work

We help you prioritize what needs to integrate, why it matters, and how it will work. Whether it's pulling in data from the field or syncing with an external system, we help you build clean, dependable connections that save your team time and give finance the visibility they need.

CONCLUSION

Acumatica gives you the connected platform.
Milestone makes it work for you.

Acumatica Construction Edition is more than just an ERP system—it's a comprehensive solution built to address the unique challenges faced by contractors. Whether it's managing materials, streamlining compliance, improving client communication, or automating approvals, Acumatica solves the most pressing pain points in the construction industry.

By leveraging Acumatica, you can:

Streamline operations
by integrating all critical business functions into one platform.

Gain real-time visibility
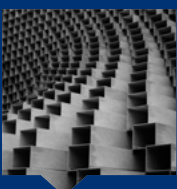into job costs, resource management, and financials, allowing you to make smarter decisions.

Automate key processes
like approvals, billing, and compliance to reduce bottlenecks and minimize delays.

Improve inventory control
and material management to prevent delays and lower costs.
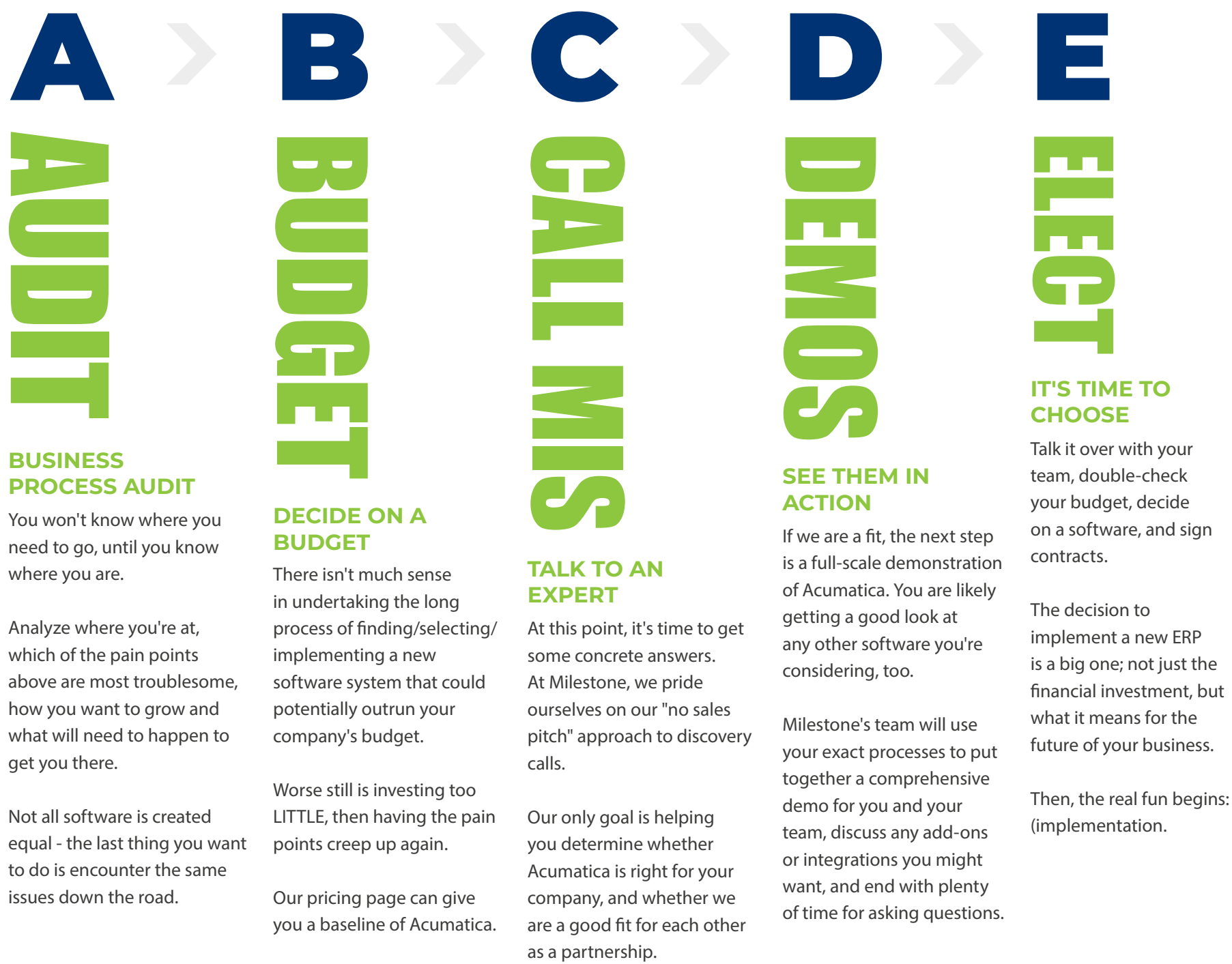
Future-proof your business
with a cloud-based platform that scales as you grow and integrates seamlessly with your favorite tools.

NEXT STEPS

Ready to transform your construction business?

With Acumatica Construction Edition, you'll have the tools you need to run your operations smoothly, boost profitability, and ensure long-term success.

A › B › C › D › E

AUDIT

BUSINESS PROCESS AUDIT

You won't know where you need to go, until you know where you are.

Analyze where you're at, which of the pain points above are most troublesome, how you want to grow and what will need to happen to get you there.

Not all software is created equal - the last thing you want to do is encounter the same issues down the road.

BUDGET

DECIDE ON A BUDGET

There isn't much sense in undertaking the long process of finding/selecting/implementing a new software system that could potentially outrun your company's budget.

Worse still is investing too LITTLE, then having the pain points creep up again.

Our pricing page can give you a baseline of Acumatica.

CALL MIS

TALK TO AN EXPERT

At this point, it's time to get some concrete answers. At Milestone, we pride ourselves on our "no sales pitch" approach to discovery calls.

Our only goal is helping you determine whether Acumatica is right for your company, and whether we are a good fit for each other as a partnership.

DEMOS

SEE THEM IN ACTION

If we are a fit, the next step is a full-scale demonstration of Acumatica. You are likely getting a good look at any other software you're considering, too.

Milestone's team will use your exact processes to put together a comprehensive demo for you and your team, discuss any add-ons or integrations you might want, and end with plenty of time for asking questions.

ELECT

IT'S TIME TO CHOOSE

Talk it over with your team, double-check your budget, decide on a software, and sign contracts.

The decision to implement a new ERP is a big one; not just the financial investment, but what it means for the future of your business.

Then, the real fun begins: (implementation.

About Milestone Information Solutions

Milestone Information Solutions is a gold-certified Acumatica partner with over 30 years of experience and expertise in ERP solutions, focusing primarily on the construction, manufacturing, and distibution industries. Our team prides itself on building an intimate relationship with our clients, so that we can best inform and support their businesses as they grow and change.

GET IN TOUCH WITH US

Phone : (360) 734-3387 | Website : www.milestoneis.com | Mail : info@milestoneis.com

Address : PO Box 1195, Bellingham, Washington, 98227

MILESTONE
INFORMATION SOLUTIONS