



COMPLETE FEATURE LIST

One connected platform to run an entire general contracting firm – five departments, with full construction accounting built in. Built on the **Systematic Construction Project Management™ (SCPM)** framework.

✓ One platform, five departments

✓ Full construction accounting built in

✓ Built-in AI on every screen

✓ 14-day free trial

THE FOUNDATION

- ✓ One workspace for the whole firm (5 departments)
- ✓ SCPM Health Score, per project and company-wide
- ✓ Structural gap detection against the framework
- ✓ Every number clicks to its source records
- ✓ One-click reach to any project or work surface

EXECUTIVE & DASHBOARDS

- ✓ Live executive dashboard (value, margin, variance)
- ✓ Project health grid with red/amber/green status
- ✓ Twelve-month margin trend
- ✓ Top risks surfaced automatically
- ✓ A personal dashboard for every role
- ✓ Health gauges, schedule and budget charts
- ✓ Weekly AI executive briefing

PROJECTS & JOB MANAGEMENT

- ✓ Full lifecycle: lead through closeout
- ✓ Pre-award pursuits kept separate from active jobs
- ✓ Full project profile and team assignment
- ✓ Auto-created document folders
- ✓ Tasks and scheduling with dependencies
- ✓ Files, photos, and video per project
- ✓ Complete activity log and audit trail
- ✓ Archiving with sign-off and retention governance

JOB FINANCES & ACCOUNTING

- ✓ Budgeting from an estimate or by hand (CSI spine)
- ✓ Job-cost workbook: budget to final, fully drillable
- ✓ Real-time job costing against budget
- ✓ Change orders that update the budget on approval
- ✓ Purchase orders and work orders vs. budget
- ✓ Commitments and buyout tracking
- ✓ Vendor bills and invoice approval
- ✓ Sub pay apps with retainage and lien waivers
- ✓ Customer pay apps on AIA G702/G703 PDFs
- ✓ AR aging, collections, and AP aging
- ✓ Margin-erosion alerts
- ✓ Full GL, journal entries, period close, statements
- ✓ One login across PM and accounting
- ✓ Export to CSV/Excel/PDF and outside systems

ESTIMATING & PRECONSTRUCTION

- ✓ Line-item estimate builder (all cost types)
- ✓ Digital quantity takeoff
- ✓ Cost catalog with historical pricing (CSI)
- ✓ Assemblies, markup, OH&P, tax, bond, alternates
- ✓ One-click estimate-to-budget conversion
- ✓ Client-facing proposal generation
- ✓ AI line-item suggestions
- ✓ Pre-award estimating dashboard and bid readiness
- ✓ Design-phase tracking
- ✓ Spec book creation by CSI division
- ✓ Drawing and plan version control

BIDDING & SUBCONTRACTORS

- ✓ Company-wide ITB hub across projects
- ✓ Branded ITB emails with auto reminders
- ✓ Structured bid forms (no PDF-reading)
- ✓ Addenda distribution with acknowledgment
- ✓ Manual bid entry
- ✓ Coverage-by-trade with uncovered-scope flags
- ✓ Line-item bid leveling with sub intelligence
- ✓ Recommended-bidder ranking
- ✓ Sub/vendor directory with insurance tracking
- ✓ Insurance alerts at 30/60/90 days
- ✓ Subcontract templates
- ✓ Sub performance scoring from the field
- ✓ Sub and vendor portal (bid and invoice)
- ✓ Lien waiver tracking per pay app

SCHEDULING

- ✓ Interactive Gantt (critical path, dependencies)
- ✓ Baseline vs. current with multiple baselines
- ✓ Two- and four-week look-aheads
- ✓ Constraints, deadlines, auto/manual modes
- ✓ Work calendars per task and resource
- ✓ Resource management, assignment, and leveling
- ✓ Network diagram, WBS, resource and usage views
- ✓ Cost and earned-value tracking
- ✓ Reports, print, and PDF output
- ✓ AI schedule from a description or from plans
- ✓ Sub schedule coordination
- ✓ Field progress updates from the phone

FIELD EXECUTION (SUPERINTENDENT)

- ✓ Daily logs (weather, crews, work, deliveries)
- ✓ Photo and video logging with tags
- ✓ Crew and individual time tracking
- ✓ Field RFIs and submittals with attachments
- ✓ Field change events
- ✓ Safety observations and incidents
- ✓ Safety meetings and toolbox talks (AI scripts)
- ✓ Work-not-in-contract logging
- ✓ Daily sub performance logging
- ✓ Punch lists pinned on the plan sheet
- ✓ Plan markups and photos pinned to locations
- ✓ Material delivery logging

PLANS & DOCUMENTS

- ✓ Document library by folder type
- ✓ Plan version control with auto-supersede
- ✓ Plan calibration and measurement
- ✓ Full RFI lifecycle
- ✓ Submittal log with review workflow
- ✓ Transmittals
- ✓ AI-formatted meeting minutes
- ✓ Searchable, tagged media library
- ✓ Document access control by role
- ✓ E-signature for contract execution

CLIENT EXPERIENCE

- ✓ Client portal with a curated project view
- ✓ Selections and allowances with budget tracking
- ✓ In-app GC-to-client messaging
- ✓ Digital change-order approval
- ✓ Online invoice view and payment
- ✓ Warranty tracking
- ✓ Client notifications for milestones and invoices

REPORTING & ANALYTICS

- ✓ Full standard report set (20+ reports)
- ✓ One-page executive summary per project
- ✓ Company-wide portfolio report
- ✓ Custom report builder
- ✓ Scheduled email report delivery
- ✓ Export to PDF, Excel, and CSV

SERVICE WORK & INVENTORY

- ✓ Work orders and a dispatch board
- ✓ Full work-order lifecycle, kept separate from jobs
- ✓ Inventory catalog, warehouses, and trucks
- ✓ Receive, transfer, count, live on-hand
- ✓ Parts to a work order or a project cost code
- ✓ Offline technician mobile flow
- ✓ Field sign-off on completion
- ✓ Labor and equipment time on the ticket
- ✓ Per-call and flat-rate invoicing

BUILT-IN AI

- ✓ Construction assistant on every screen
- ✓ Daily log auto-fill from voice or text
- ✓ RFI and submittal drafting
- ✓ Change-order description generator
- ✓ Smart meeting minutes
- ✓ Margin-erosion prediction
- ✓ Schedule-risk detection
- ✓ Sub performance anomaly flags
- ✓ Budget-variance root-cause summaries
- ✓ Insurance and compliance expiration intelligence
- ✓ Photo safety and quality analysis
- ✓ Bid win-rate prediction
- ✓ AI onboarding coach

MOBILE APP

- ✓ Full offline field app with sync
- ✓ Daily logs, photos, RFIs, punch, sub scoring
- ✓ Real Gantt schedule on the phone
- ✓ Field time entry
- ✓ Service work orders and parts capture
- ✓ Push notifications
- ✓ AI executive briefing on the phone
- ✓ Full-width layouts, same data as the web

SALES, MARKETING & CRM

- ✓ One shared client database, prospect to project
- ✓ Accounts, contacts, and drag-and-drop deals
- ✓ Task workload and full interaction timeline
- ✓ Lead management with follow-up cadence
- ✓ Go/no-go scorecard and win-rate tracking
- ✓ Department-scoped, need-to-know access
- ✓ AI relationship summary and follow-up drafting
- ✓ Sales analytics and pipeline reporting

EMAIL & COMMUNICATION

- ✓ Use your existing email (Gmail, M365, IMAP)
- ✓ Tracked outbound, auto-filed to the record
- ✓ Per-project and per-account inbound addresses
- ✓ A unified inbox with two-way threads

SETUP, SECURITY & ADMINISTRATION

- ✓ Invite-based onboarding with roles
- ✓ Permission templates and per-user overrides
- ✓ Least-privilege by default
- ✓ Multi-entity and divisions in one workspace
- ✓ Permission-change audit log
- ✓ Self-serve signup with a seeded sample company
- ✓ Persistent training workspace
- ✓ AI-guided onboarding
- ✓ Automatic tier billing from the books
- ✓ Super-admin console for all tenants

INTEGRATIONS

- ✓ QuickBooks two-way sync
- ✓ Sage 300 job-cost sync
- ✓ Microsoft 365 (Outlook, Teams, OneDrive)
- ✓ Google Workspace (Gmail, Drive)
- ✓ DocuSign e-signature
- ✓ Procore data migration
- ✓ Online payments via Stripe

