

# ERP Integrations for Autodesk Construction Cloud (CS500023)

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# Session Agenda

Review Autodesk Build - Cost Management:

- Capabilities and Workflows

Introduction to hh2's Universal Construction Model:

- Sage 300 CRE Integration

Autodesk Construction Cloud Connect:

- Common Integrations
- QuickBooks Online







Session Q&A

# **Autodesk Build – Cost Management**



# Autodesk Build Capabilities & Workflows



Capabilities	 Doc Management	 Cost Management	 Project Management	 Quality	 Safety	 Project Closeout
Workflows	<ul style="list-style-type: none"><li>• Document Control</li><li>• Document Versioning</li><li>• Document Approvals</li></ul>	<ul style="list-style-type: none"><li>• Budget Creation / Administration</li><li>• Change Orders</li><li>• Payment Applications</li><li>• Forecasting</li></ul>	<ul style="list-style-type: none"><li>• RFIs</li><li>• Submittals</li><li>• Meeting Minutes</li><li>• Daily Reports</li></ul>	<ul style="list-style-type: none"><li>• Quality Planning</li><li>• QA/QC</li><li>• Punchlists</li><li>• Issue Management</li></ul>	<ul style="list-style-type: none"><li>• Safety Planning</li><li>• Safety Training</li><li>• Safety Observations</li><li>• Safety Inspections</li></ul>	<ul style="list-style-type: none"><li>• Commissioning</li><li>• Turnover Documentation</li><li>• Warranty Mgmt.</li><li>• Final Completion</li><li>• As-Built Survey</li></ul>
Unified Data	Models · Drawings · Documents · Cost Items · Assets · Photos · Videos					
Insight	Dashboards · Reports · Data Connector · Construction IQ					
Admin	Project Setup · User Management · Admin Console					



## Cost Management with Autodesk Build:

- ✓ Better cost control
- ✓ Streamlined cost workflows & enhance collaboration
- ✓ Improved forecast accuracy
- ✓ Real-time visibility of cost-related risk and the project's financial health



# COST MANAGEMENT

Maintain transparency and improve cost organization by centralizing cost information into a single platform.

- Flexible Budget Structures
- Contract Generation Tool
- Full Change Order Workflow
- Cash Flow Forecasting



# Flexible Budget Structures

Manage your budget in a system that supports custom budget structures.

Detailed hierarchical build ups

Custom segment options

Segment code sample and budget code preview to ensure accuracy

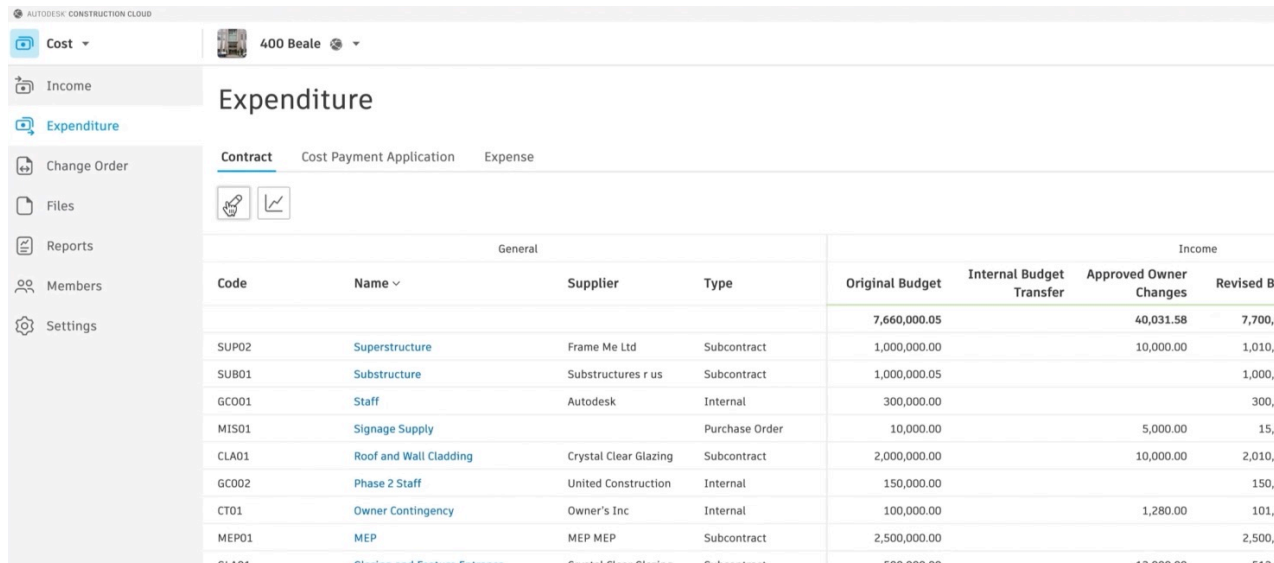
Master list import

The screenshot shows the 'Settings' page for the 'ACC Build Training Project' in the Autodesk Construction Cloud. The left sidebar contains navigation links: Cost, Income, Expenditure, Change Order, Files, Reports, Members, and Settings (which is highlighted). The main content area is titled 'Settings' and has tabs for General, Income (selected), Expenditure, Change Order, Permission, and Activity. Under the 'Income' tab, there is a section for 'Budget code segments'. It includes a 'Budget code preview' field showing '\*.#'. Below this, there are configuration options for 'Segment 1' and 'Segment 2', with 'Add new' and a refresh icon. The 'Segment 1' configuration includes a 'Wire' dropdown (set to 'Code'), a '# of digits' dropdown (set to '01'), and a 'Delimiter' dropdown (set to 'Point'). A 'Segment code preview' field shows 'Enter example code'. Below these is a 'Segment code master list' section with an 'Add' button, a 'Download template' link, and an 'Import' button. A table header is visible with columns: 'Original code', 'System code ^', and 'Description'. The table is currently empty, displaying a 'No segment code' message with an illustration of a construction crane and the text 'Added or imported codes will appear here'. At the bottom, there is a 'Lock master list' checkbox.

# Contracts & Contract Generation

Get contracts out the door faster and streamline the management process.

- Leverage custom document templates to create standard contract formats. Data auto-populates during contract generation
- Automatically compile appendices from multiple locations into a single package
- Connect supplier contracts to the main contract
- Link multiple contracts to a single budget line item or multiple budget line items to a single contract
- Utilize custom approval workflows for internal reviews
- Email contracts directly from Autodesk Build



**Expenditure**

Contract Cost Payment Application Expense

General				Income			
Code	Name	Supplier	Type	Original Budget	Internal Budget Transfer	Approved Owner Changes	Revised Budget
				7,660,000.05		40,031.58	7,700,0
SUP02	Superstructure	Frame Me Ltd	Subcontract	1,000,000.00		10,000.00	1,010,0
SUB01	Substructure	Substructures r us	Subcontract	1,000,000.05			1,000,0
GCO01	Staff	Autodesk	Internal	300,000.00			300,0
MIS01	Signage Supply		Purchase Order	10,000.00		5,000.00	15,0
CLA01	Roof and Wall Cladding	Crystal Clear Glazing	Subcontract	2,000,000.00		10,000.00	2,010,0
GCO02	Phase 2 Staff	United Construction	Internal	150,000.00			150,0
CT01	Owner Contingency	Owner's Inc	Internal	100,000.00		1,280.00	101,2
MEP01	MEP	MEP MEP	Subcontract	2,500,000.00			2,500,0
GLA01	Glazing and Exterior Entrances	Crystal Clear Glazing	Subcontract	500,000.00		10,000.00	510,0

# Change Order Workflows

Create clear accountability and seamlessly manage all aspects of the change order process.

- Fluid upstream and downstream change order workflows
- Auto-generate documents needed during the change order process
- Immediately view the impact of changes on the overall project budget
- Ability to send batch quotation requests and reminders

Income

Expenditure

Change Order

Files

Reports

Members

Settings

Cost Item

PCO

RFQ

RCO

OCO

SCO

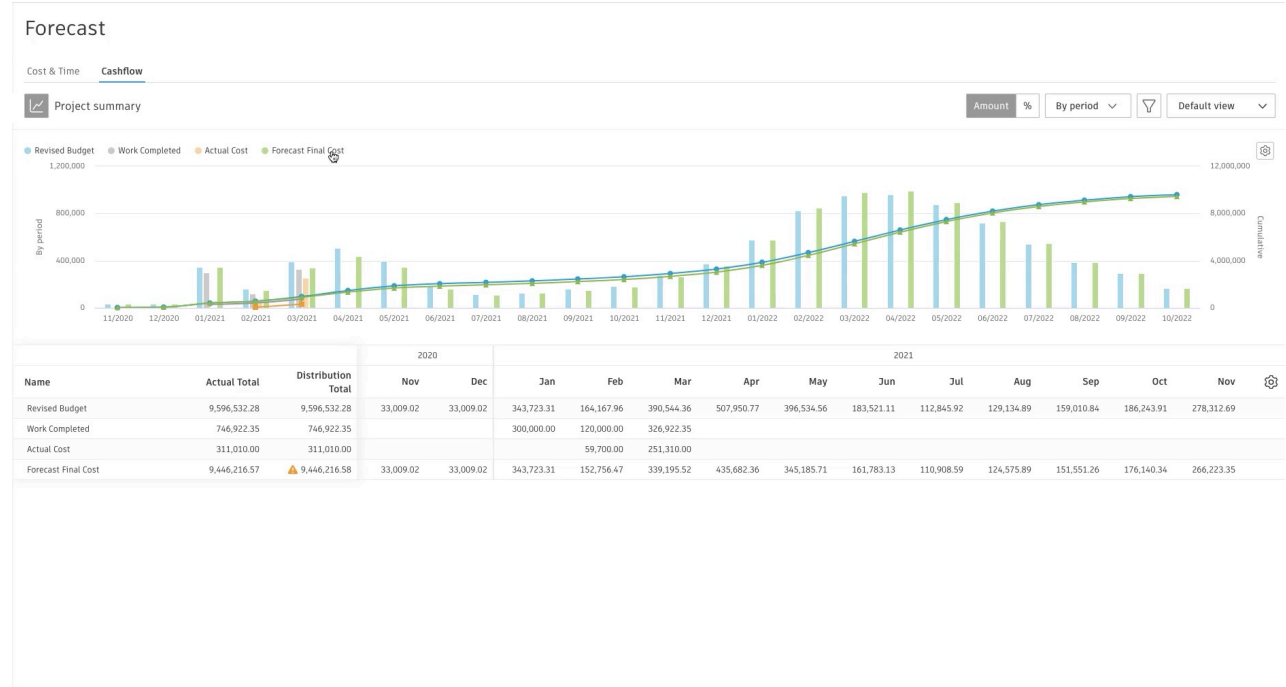
+ Add

<input type="checkbox"/>	Number ^	Name	Scope	Type	Budget Code	Budget Name	Contract Name	Supplier	Source Type	Source R
Expand...   Collapse...										
<input type="checkbox"/>	> P-0001	Additional Slab Openings	---	Out	Owner Change Order				ISSUE	001
<input type="checkbox"/>	> P-0002	Revised Signage Scheme	---	Out	Owner Directive				ASI	001
<input type="checkbox"/>	> P-0003	Revised Entrance	---	Out	Owner Change Order				CCD	001
<input type="checkbox"/>	> P-0005	Window upgrade	---	In					RFI	Precon-01
<input type="checkbox"/>	> P-0006	Quality (Issue #407)	---	Out					RFI	Precon-01
<input type="checkbox"/>	P-0007	Tile flooring	---	Out	Internal Change				RFI	Precon-01
<input type="checkbox"/>	> P-0008	Clearance Insufficient	---	Out	Owner Direct Purcha...				RFI	Precon-01
<input type="checkbox"/>	> P-0009	ADA Bathroom Upgrade	---	In	Owner Change Order					
<input type="checkbox"/>	P-0010	Incorrect Flooring Installed (Is...	---	Out					RFI	14
<input type="checkbox"/>	P-0011	Ceiling VAV	---	Out					RFI	ADSK-2
<input type="checkbox"/>	P-ODR-0001	Additional Glass Tinting	In	Owner Directive					RFI	75

# Cash Flow Forecasting

Access a project-level cash flow analysis with a dynamic time-versus-money cart for better visualization.

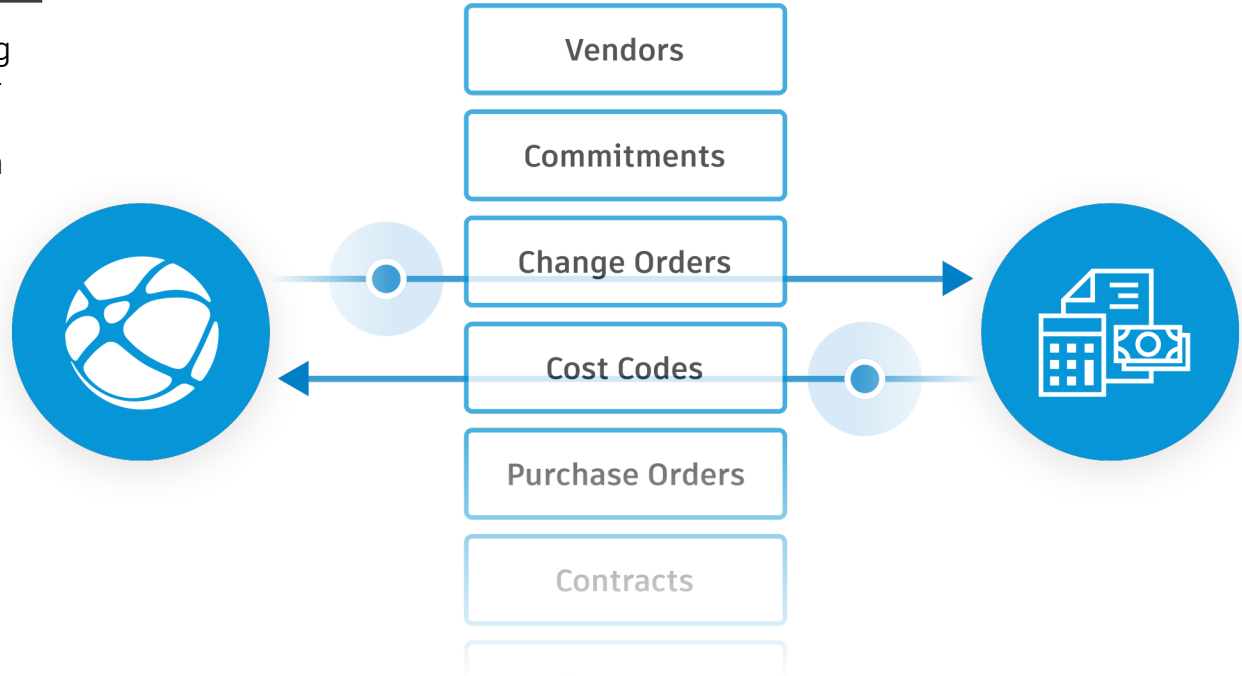
- Connect schedule tasks to budget line items to quickly determine duration and enable calculations for annual price increases.
- Easily perform forecast distributions for each budget line items using built-in forecast distribution curves.
- Access a project-level cash flow analysis to visualize the differences between planned and forecast results.



# ERP & Accounting Integrations

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Seamlessly integrate your accounting data from your ERP system with your cost data in Autodesk Build, keeping your project and accounting teams in sync and your financial information completely up to date.







# **Universal Construction Model Cost Management + Sage 300 CRE**

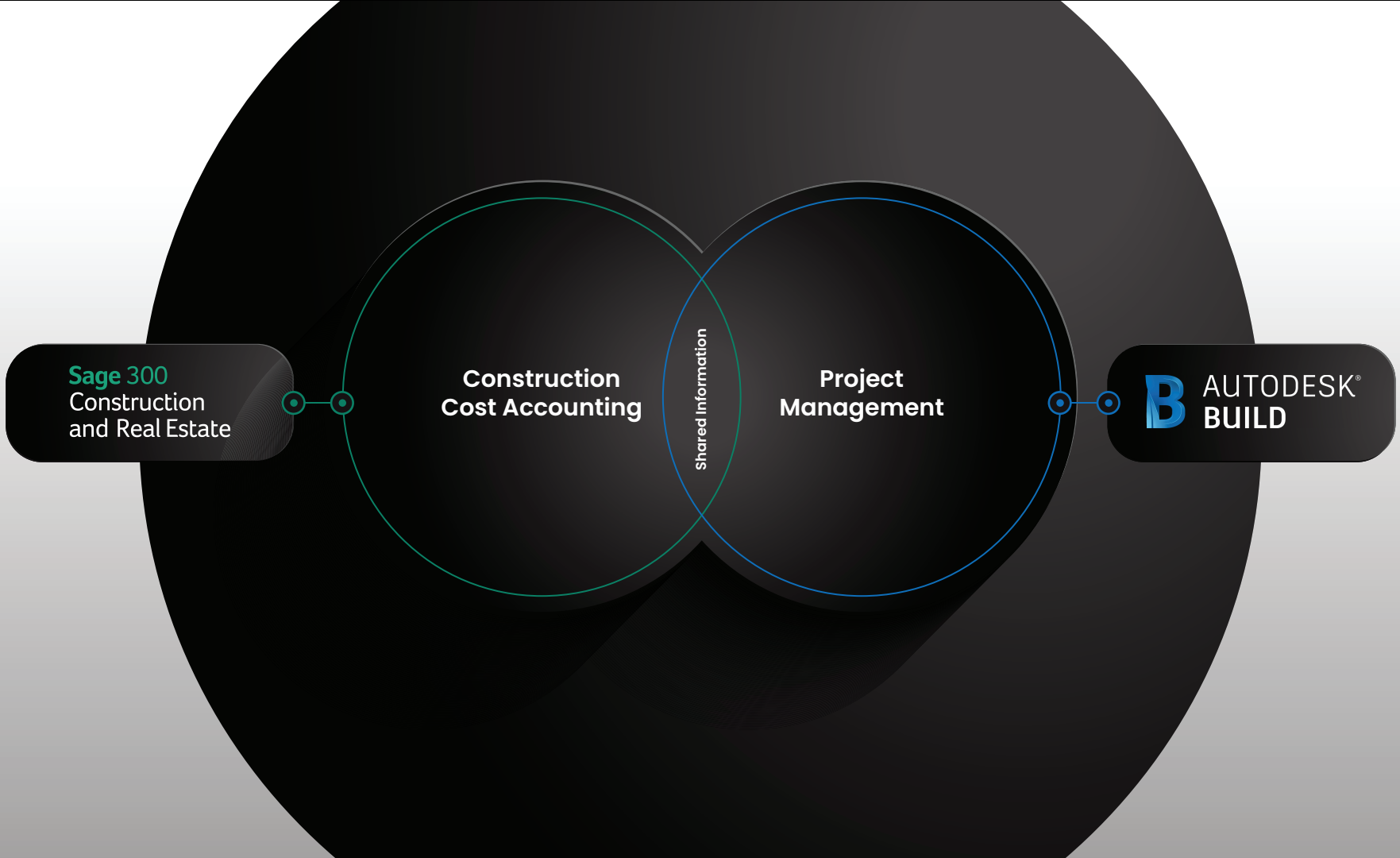
**Sage 300**  
Construction  
and Real Estate

**Construction  
Cost Accounting**

Shared Information

**Project  
Management**

**B** AUTODESK®  
**BUILD**



**Sage 300**  
Construction  
and Real Estate

The diagram illustrates a three-stage integration process. Stage 1 (On Premise) features Sage 300 Construction and Real Estate. Stage 2 (In the Cloud) features the UCM Universal Construction Model, which acts as an integration platform. Stage 3 (In the Cloud) features Autodesk Build for project cost management. Bidirectional arrows connect the stages, indicating a two-way flow of data and integration.

**On Premise**

Construction  
Enterprise Accounting



hh2 Integration Client



**In the Cloud**

Integration Platform



UCM Connect - Autodesk



**In the Cloud**

Project Cost  
Management

**Sage 300**  
Construction  
and Real Estate

Vendors

Customers

Jobs

Standard Cost Codes

Standard Categories

Job Cost Codes  
Categories

Commitments

Commitment  
Change Order



**B** AUTODESK®  
**BUILD**

Companies  
(Designated as Vendors)

Companies  
(Designated as Customers)

Projects

Budget Group List  
(Standard Cost Codes)

Budget Group List  
(Standard Categories)

Budgets

Subcontracts  
& Purchase Orders

Commitment  
Change Order

# Demonstration

# Pending Features

**Sage 300**  
Construction  
and Real Estate

Commitments

Estimate Changes

Actual Cost (Detailed)

Contracts

Contract Changes

Customer/Owner Invoices

Subcontractor/Supplier  
Invoices

**B** AUTODESK®  
**BUILD**

Subcontracts  
& Purchase Orders

Budget Changes

Expenses

Main Contract

Main Contract Changes

Budget Payment Applications

Cost Payment Applications

The background of the image is a dark, abstract composition of geometric shapes and sharp, diagonal lines. These lines are rendered in various shades of dark gray and black, with some edges highlighted by a thin, bright, metallic-looking glow, possibly gold or light gray, which adds a sense of depth and modernity. The overall aesthetic is clean, professional, and tech-oriented.

# **Autodesk Construction Cloud Connect**

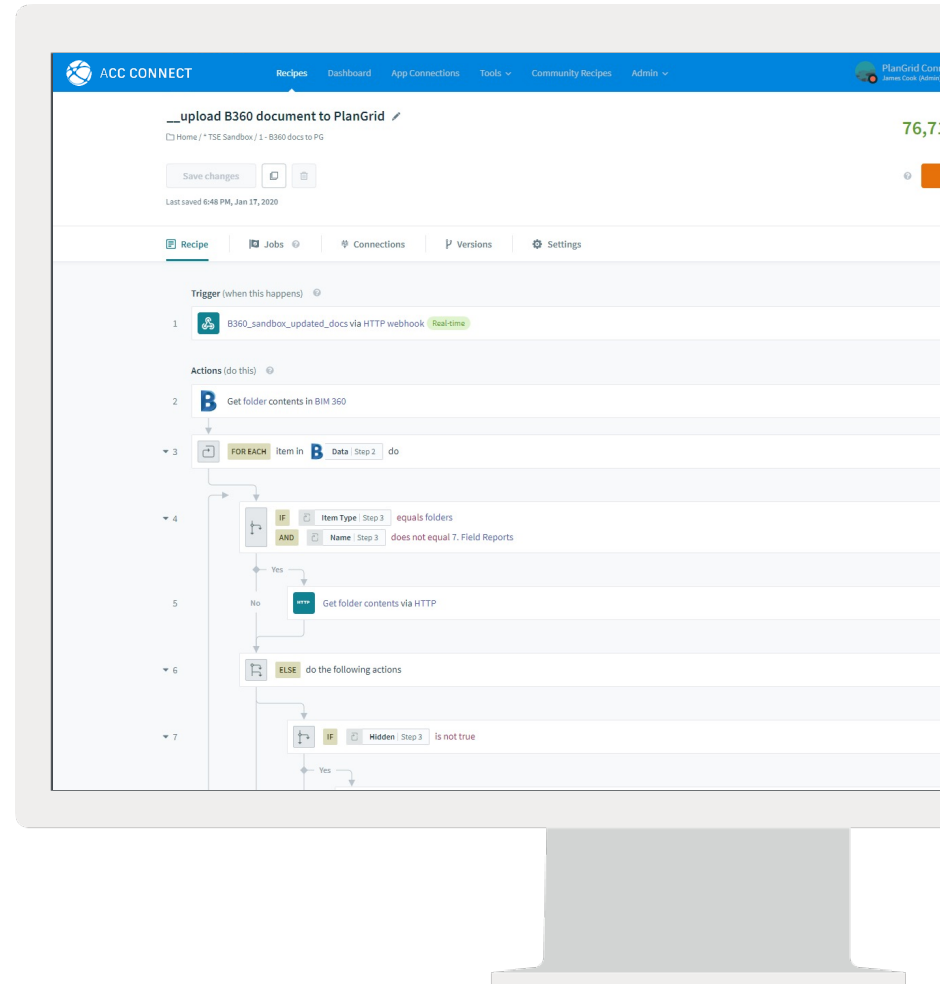


## Integrate Autodesk Construction Cloud with critical software systems

- Cloud Storage
- PM/ERPs
- CRMs
- eSignature
- Each Other
- and more

## Create custom workflows between systems

- Route files and data per YOUR processes
- Leverage triggers between systems
- Keep different applications up to date





# Connect to the Unified Platform

## AUTODESK® **BUILD**

Integrate with Files, Forms,  
Assets, RFIs, and Photos.

## AUTODESK® **DOCS**

Integrate with Files.

## AUTODESK® **COST**

Integrate Budgets, Expenses,  
and Change Orders with  
accounting and payroll  
applications.

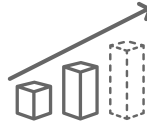
## AUTODESK® **TAKEOFF**

Export takeoff packages and  
quantities from your sheets and  
models.

# Common Integrations with ACC Connect



Document  
Management



Project Management,  
Reporting, & Analytics

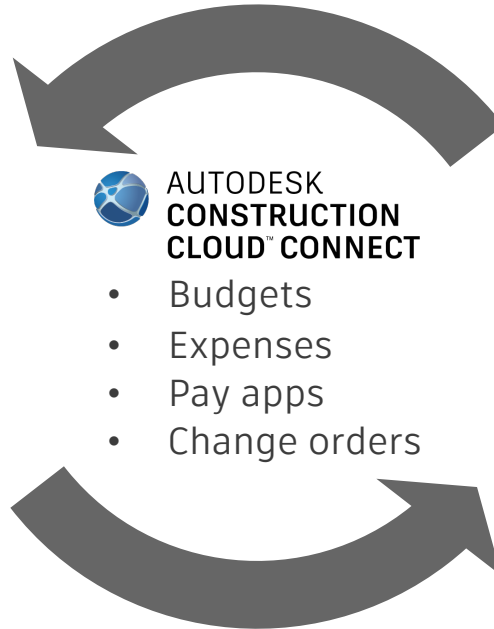


Communication &  
Collaboration



# Integrate with Cost Management

AUTODESK®  
**COST**



 **Intuit**  
QuickBooks®  
Online

**sage** Intacct



# Example: Streamlined Cost Management

Combining two deal enabling workflows

1. Expense is captured and approved within Autodesk Cost.

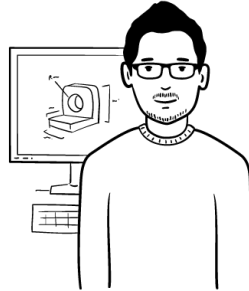


AUTODESK  
CONSTRUCTION  
CLOUD™ CONNECT



Approved expense is  
detected and pushed to  
accounting system.

2. Bill is automatically created in accounting system awaiting payment.



AUTODESK  
CONSTRUCTION  
CLOUD™ CONNECT



Paid bills are detected and  
updates Autodesk Cost.



AUTODESK®  
COST



Intuit  
QuickBooks  
Online

sage Intacct



AUTODESK®  
COST



Demo: Push Cost  
expense to QBO

ACC Cost Item to QBO | Autod...

Expenditure - Autodesk Cost

Expense Transactions

app.workato.com/recipes/1531258-copy-of-acc-cost-item-to-qbo#recipe

AppsWorkatoAD BuildBIM 360Autodesk BIM 360...PlanGridlearning-content/...StagingACSDocumentationInternal AppsSmartsheetCloud StorageMisc

ACC CONNECTAssetsDashboardToolsCommunity libraryAdminAutodesk

Assets > Home > Webinar/BIM 360 Cost/BIM 360 Cost <-> QBO > ACC Cost Item to QBO : Recipe

ACC Cost Item to QBO

Edit recipeStart recipe

0 successful | 0 failed

Stopped a few seconds ago

RecipeJobsConnectionsVersionsSettings

TRIGGER

1

New or updated cost object in a project in Autodesk Construction Cloud

IF

Status | Step 1 equals approved

ACTIONS

2

Get project in Autodesk Construction Cloud

3

Search customers in QuickBooks

4

Search vendors in QuickBooks

5

Search Items in QuickBooks

6

Search G/L accounts in QuickBooks

7

Create purchase order with a multi line item in QuickBooks

End

The background features four abstract, dark, metallic-looking geometric shapes in the corners, resembling stylized computer monitors or architectural elements. They are arranged symmetrically, with two in the top corners and two in the bottom corners, framing the central text.

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