# A Single System to Streamline Your Project-Based Operation

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# About Corecon Technologies, Inc.

- Founded in 1999
- Customers in 15 Countries
- Construction Software Focus: Estimating, Project Management, Job Cost Control, Scheduling and Collaboration
- Ideal Customers: Commercial GCs, Commercial Subs, Custom Home Builders, Design-Build and Engineering Firms

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# Why Corecon as a QuickBooks Addon?

Job costing is a key aspect to project management and is one of the main reasons engineering and construction firms consider Corecon. Many of these firms are satisfied with QuickBooks Desktop or Online for their accounting software, but when it comes to handling project financials such as tracking subcontracts, potential changes, approved COs and AIA Invoicing, this is where Corecon excels.

**In a nutshell, Corecon's software suite will complement QuickBooks and eliminate workarounds using spreadsheets!**

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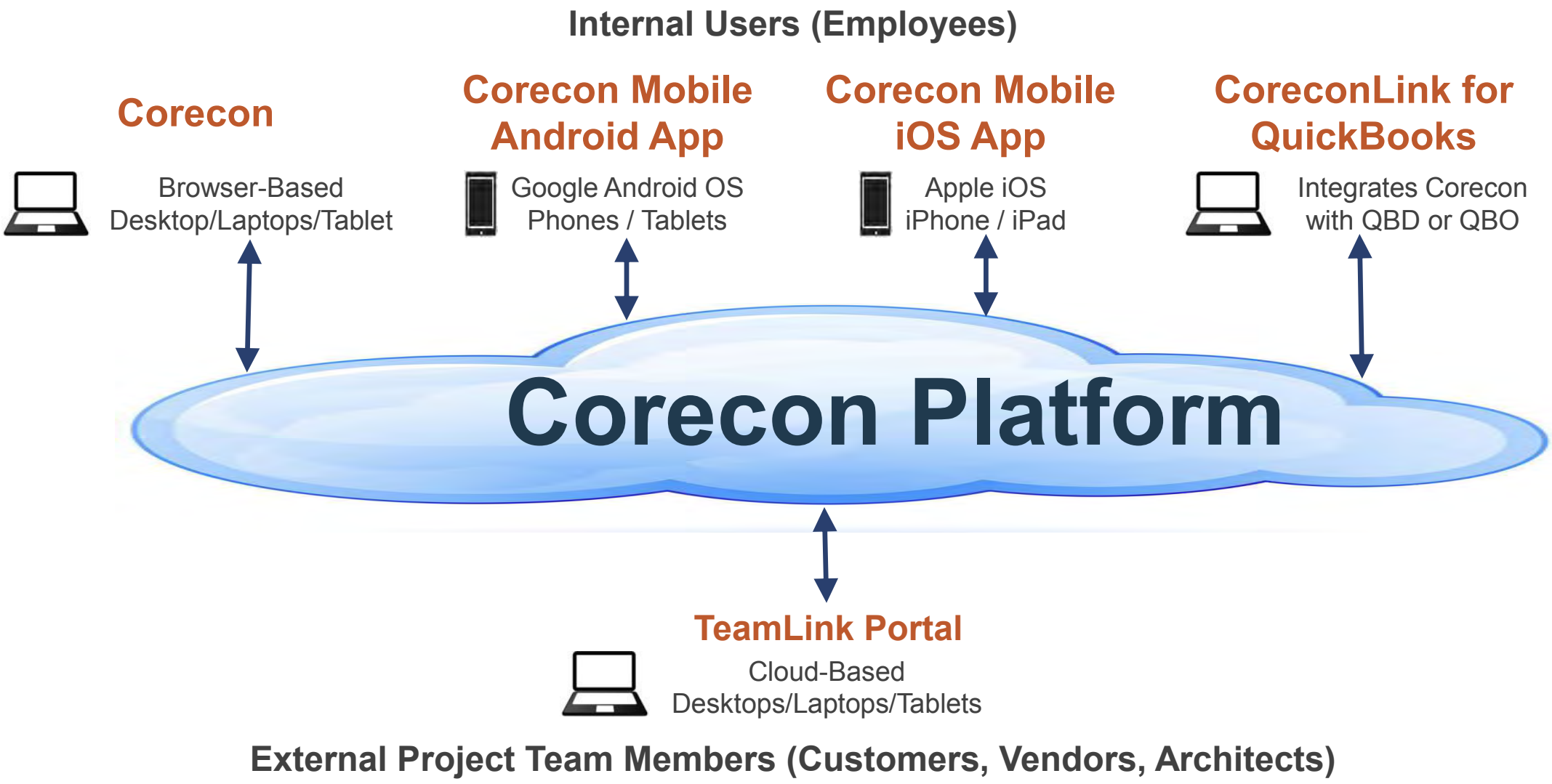
# A Platform Built For Collaboration & Mobility

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# Features For Tracking Job Opportunities

## Contact Management

- Companies
  - Contacts
  - Classifications
  - Bidder List Controls
  - Insurance Tracking
  - License Tracking

## Leads

- Project Leads
- Lead Directory
- Track Lead Stages
  - Bidding
  - Bid Submitted
  - Award
  - Not-Award
- Lead Analytics

## Drawings, Specs & Invitation To Bid

- Drawings
- Specifications
- Invitation To Bid
  - Bid Captain
  - Addenda
  - Correspondence
  - Vendor ITB Status

## Cost Databases

- Cost Database
  - Labor Items
  - Equipment
  - Crews
  - Material & Work Items
  - Work Assemblies
  - Formulas
- RS Means Cost Databases (Add-on)

## Estimating

- Estimates
  - WBS (sections)
  - Cost Line Items
  - Markups
  - Proposal Inclusions, Excl., Clarifications
- RFP Packages
  - Vendors
  - Tagged Est. Items
  - Bid Analysis
- Proposal Reports

## Correspondence

- Journals
- RFIs
- Submittals
- Transmittals

## Documentation

- Photos & Renderings

## Quality Control (QC)

- Checklists

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# Features For Managing Awarded Projects

## Contact Management

- Companies
  - Contacts
  - Classifications
  - Bidder List Controls
  - Insurance Tracking
  - License Tracking

## Project

- Projects
- Project Directory

## Drawings & Specs

- Drawings
- Specifications

## Contract Admin

- Setup Wizards
- Cost Codes
- Prime/Client Contracts
- Change Proposal Request (CPR)
- Change Order (CO)
- Prime Invoicing

## Procurement

- Anticipated Costs
- RFP Packages
- POs
- Bills
- Subcontracts
- Sub Change Orders
- Sub Invoicing

## Time & Expenses

- Employee Management
- Labor Timecards
- Misc. Expenses
- Equipment Tracking
- Eqp. Timecards

## Correspondence

- Issues
- Journals
- RFIs
- Submittals
- Transmittals

## Documentation

- Project Photos
- Daily Logs
- Meetings
- Work Orders

## Quality Control (QC) & Safety

- Checklists
- Comply Notices
- Permits
- Punchlist Items
- Test / Inspection
- Safety Incidents
- Safety Meetings
- Site Hazard Assessments

## Calendars & Scheduling

- Project Calendar
- Task Calendar
- Resource Calendar
- Schedules

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# Construction & Engineering Firm Departments

## Estimating

### Corecon:

- Document Leads (Opportunities)
- Upload Drawings and Specs
- Invite Subs & Suppliers To Bid (ITB)
- Prepare Estimate(s)
- Prepare RFP Packages
- Track Lead Status using Stages
- Lead Analytics (ex. Won/Loss)

## Project Mgmt & Field Staff

### Corecon & Mobile Apps:

- Contract Administration
- Procurement
- Timecards & Misc. Expenses
- Project Financial Analytics
- Correspondence
- Documentation
- QC & Safety
- Scheduling

## Accounting

### Corecon:

- Contract Administration
- Procurement
- HR, Timecards & Misc. Expenses
- Project Financial Analytics

### CoreconLink:

- Sync Customers, Vendors, Employees
- Export Corecon Project Transactions
- Import Payment Status Information

### QuickBooks (QBD or QBO):

- Payroll
- Payments
- Deposits
- Reconciliations
- Corporate Financial Reporting

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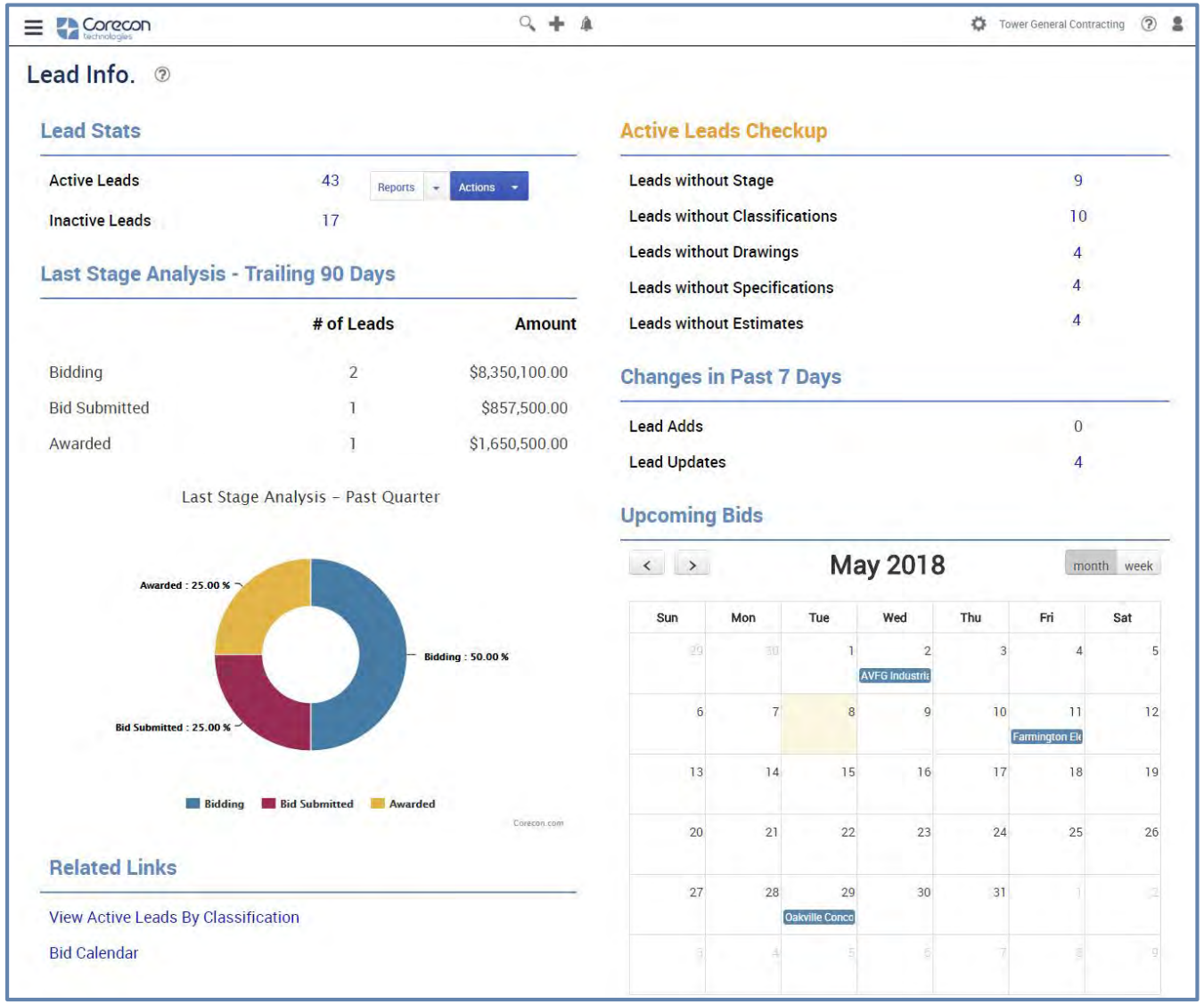
# Corecon - Lead Tracking

- Categorize Leads any way you want so it fits your process, for example:
  - Lead Source: Referral, Bid Invite, Advertisement
  - Structure: Custom Home, School, Medical Facility, Retail Facility
- Gain better insights into job opportunities by easily setting the status of each Lead using Stages, for example:
  - Bidding
  - Bid Submitted
  - Award
  - Not Award
- Upon award, quickly move lead information to projects with a click of a button.
  - Drawings, Specs
  - Estimates
  - RFP Packages
  - Correspondence

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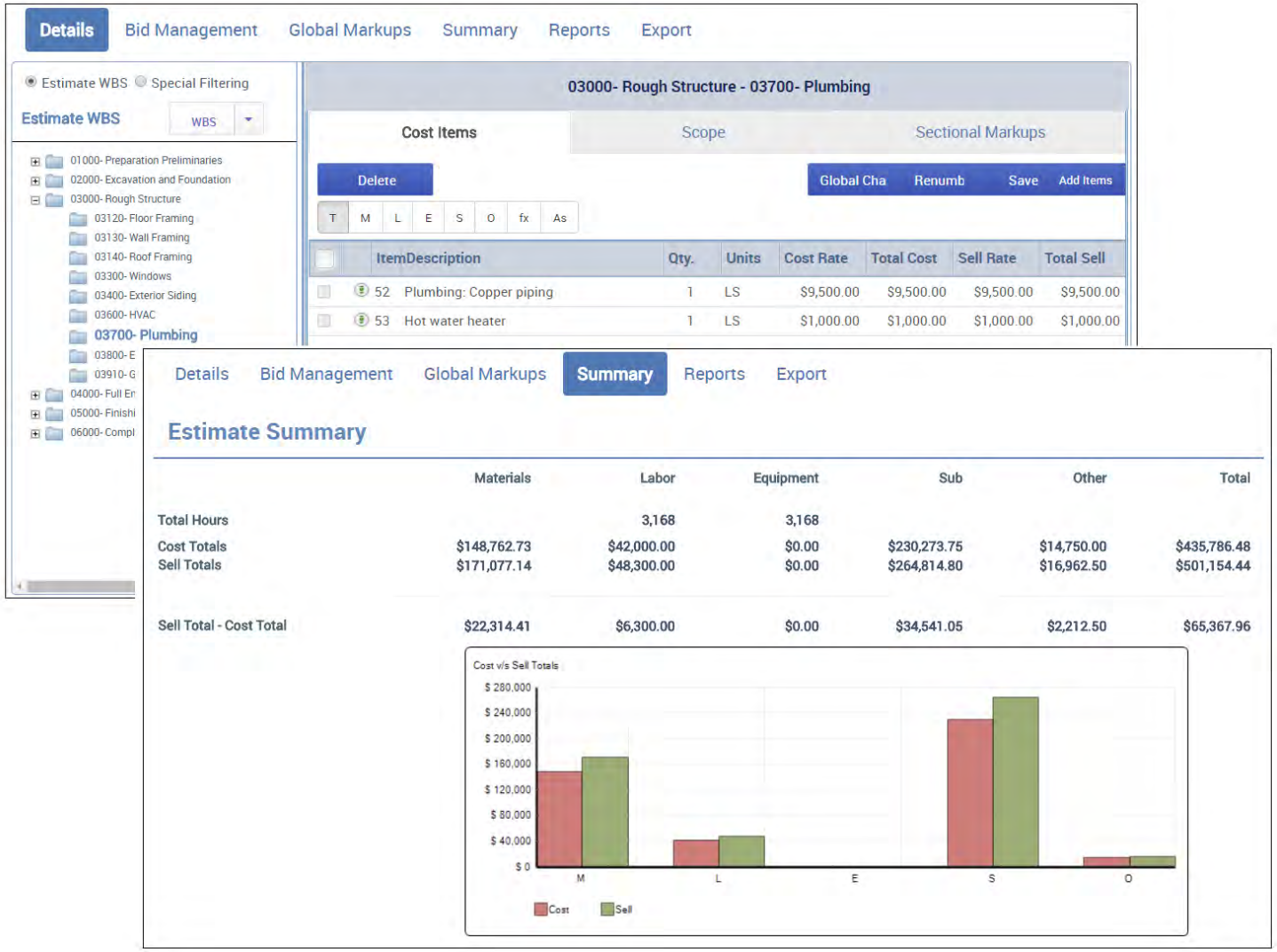
# Corecon - Estimating

- True Team Based Estimating: Multiple estimators can work on the same estimate at the same time.
- Create multiple estimates per Lead or Project: Base Bid, Rev 1, Rev 2
- Organize Estimates up to 4 tiers using Work Breakdown Structures (WBS)
- Add Items on the fly, from your own Cost Database, or an industry standard source such as RS Means
- Document Inclusions or Exclusions by WBS section
- Add Markups at 3 Levels: Line Item, Section, or Entire Estimate
- Integrated RFP Packages
  - Send Bid Invites to Vendors via Email
  - Allow Vendors to Submit Pricing Online via Corecon's TeamLink Portal
  - Compare vendor pricing side-by-side using the Bid Analysis feature
  - Update estimate line item pricing with Awarded Vendor's pricing
- Generate Estimate Proposals with a click of a button

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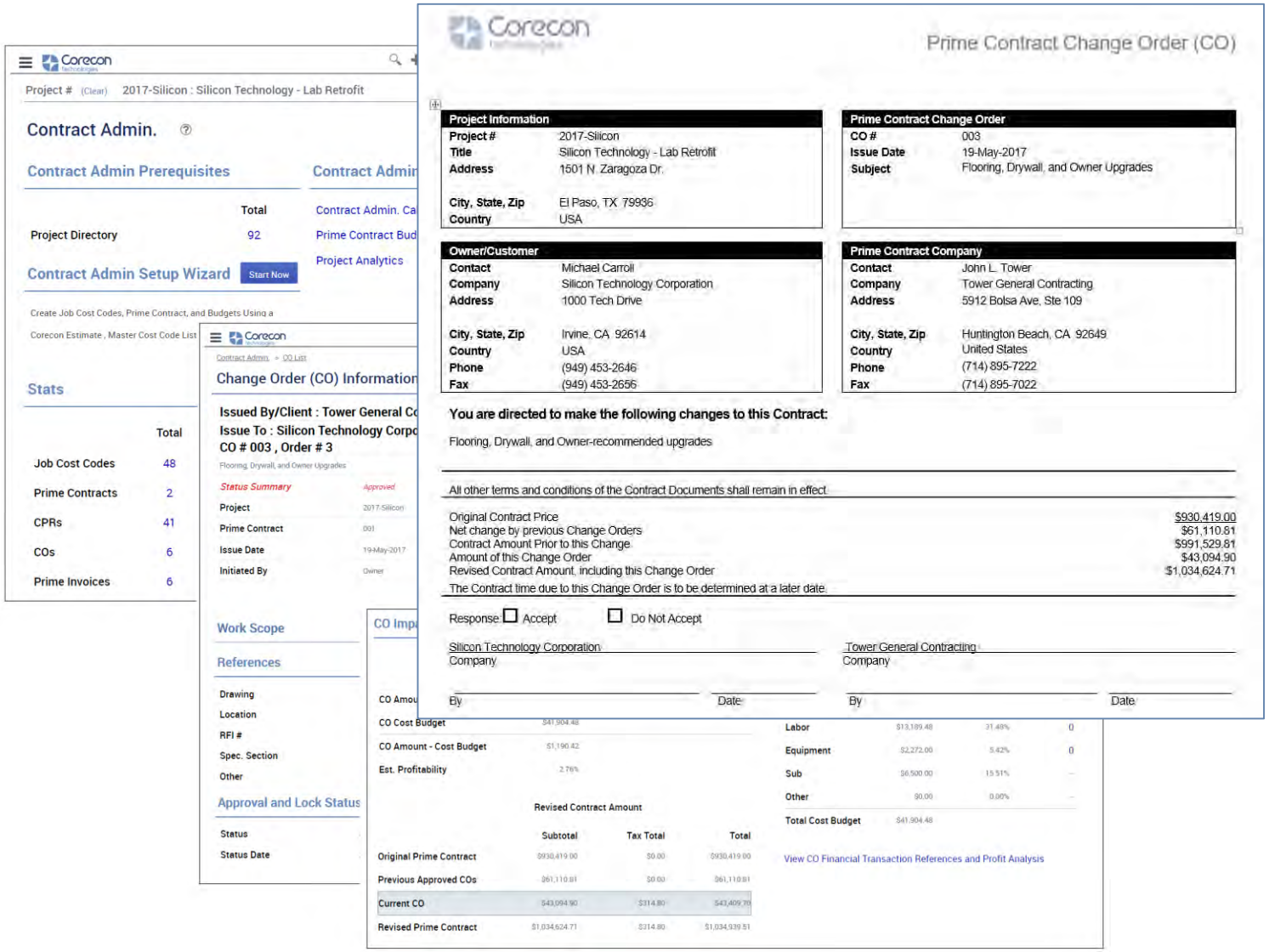
# Corecon - Contract Administration

- Built-in Wizards to setup Job Cost Codes, Client/Prime Contract, and Budgets using a Corecon Estimate, spreadsheet, or from master cost codes
- Manage Multiple Prime Contracts for an Individual Project:
  - Design Phase, Build Phase
  - Bldg.1, Bldg. 2
- Support for Four Contract Types
  - Fixed Lump Sum
  - Cost Plus with Guaranteed Max. Price (GMP)
  - Cost Plus without GMP
  - Unit Price
- Job Cost Code Budget Tracking Options:
  - Cost Budgets: Mat, Lbr, Eqp, Sub, and Other
  - Contract Amount
  - Hour Budgets: Lbr and Eqp
- Comprehensive Change Management:
  - Change Proposal Request (CPR) with Vendor Solicitation
  - Change Orders (CO)
- Pending, Approved and Not Approved Status Options for all Contract Admin features
- Percent Complete Style Invoicing with Retention or Holdback Tracking (ex. AIA Style)
- Export Prime Invoices to QBD or QBO

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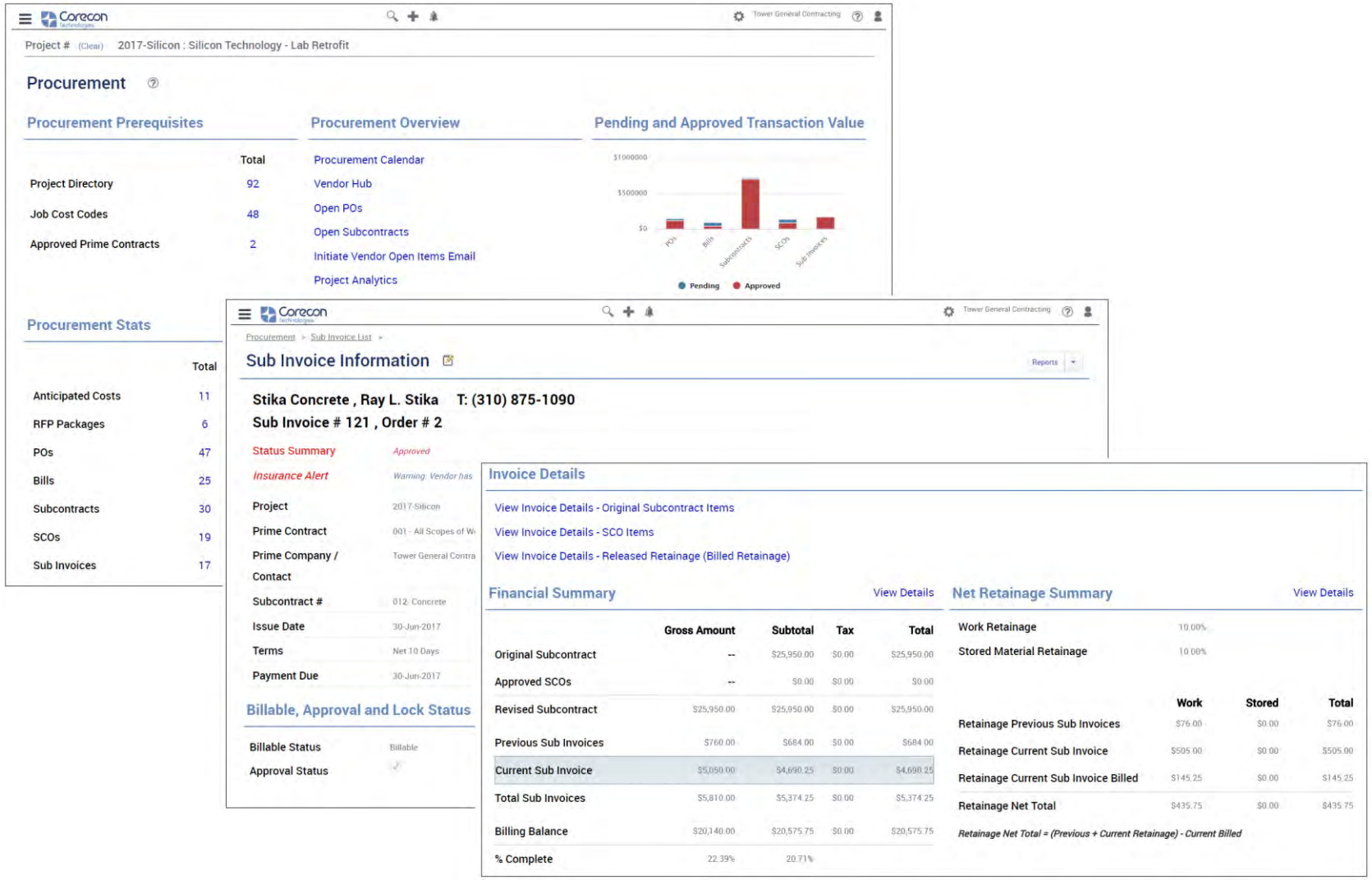
# Corecon - Procurement

**Integrate Estimating with Procurement!**
Corecon's Procurement Wizard can copy Estimate items and RFP Packages to POs and/or Subcontracts saving time by eliminating duplicate data entry and minimizing mistakes.

**Separate Processes for Suppliers and Subs:**
There are different requirements when it comes to purchasing materials from suppliers versus obtaining services from subs -- this is why there are separate features for each:

- PO & Bill
- Subcontract, SCO & Sub Invoices
  - Contract Types: Fixed Lump Sum, Cost Plus, and Unit Price
  - AIA Style Progress Invoicing

**Export Bills and Sub Invoices:**
Eliminate duplicate data entry by exporting Bills and Sub Invoice to QBD or QBO using the CoreconLink utility.

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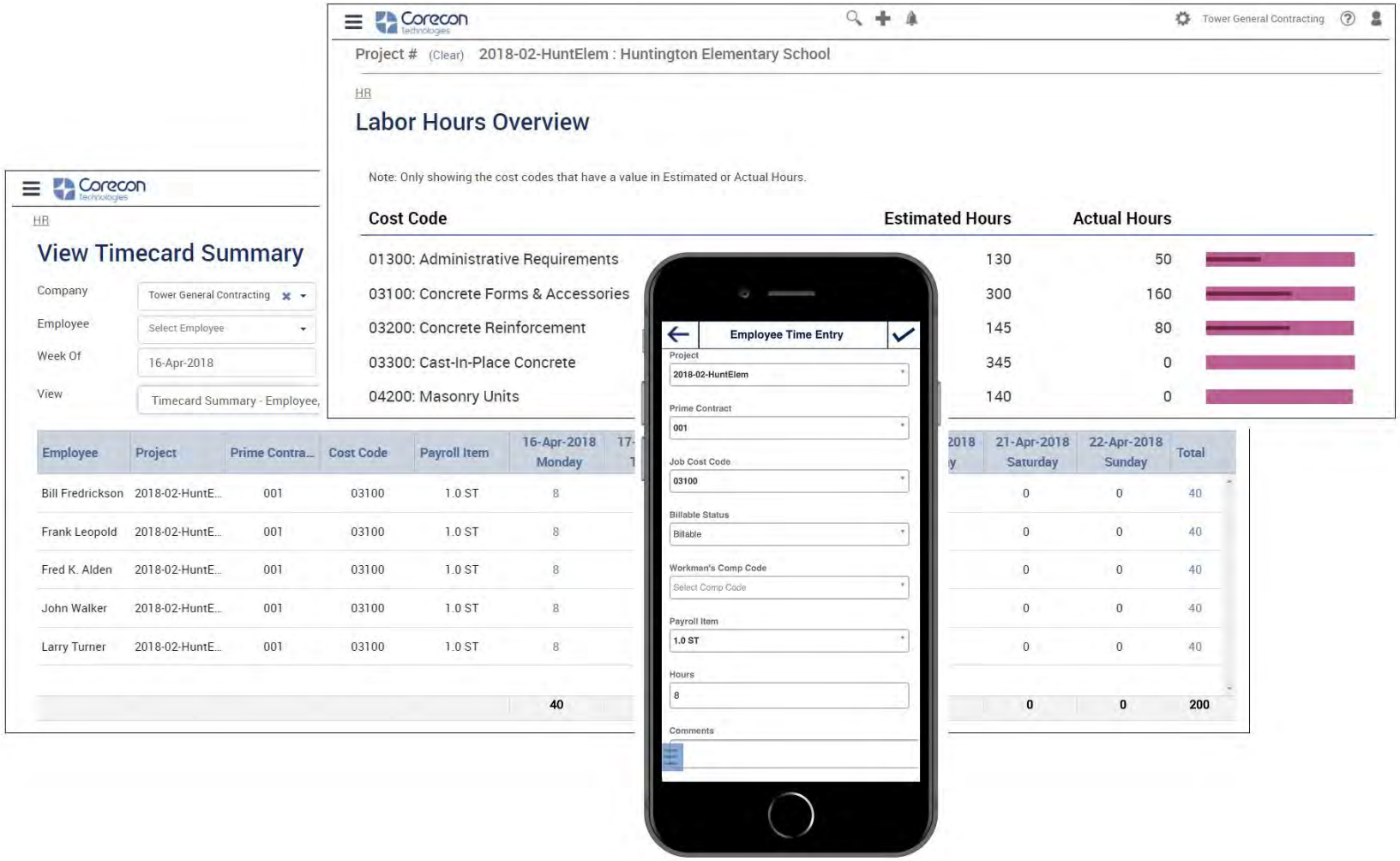
# Corecon - Time Tracking

For companies that self-perform work, tracking employee labor and/or equipment on a daily or weekly basis is crucial for keeping projects in line with budgets. Unlike many time-tracking systems, Corecon is specifically designed to address the demands of the engineering and construction industry.

**Highlights:**

- Import, export, and sync employees via CoreconLink utilities
- Default and project-specific cost and bill rates
- Daily and weekly data entry forms for employees and crews
- Pending, approved and not approved transaction status
- Billable status for invoicing cost plus projects
- Labor and Equipment Analysis Dashboards that calculate future savings or cost overruns
- Export options to CSV, Excel and via CoreconLink

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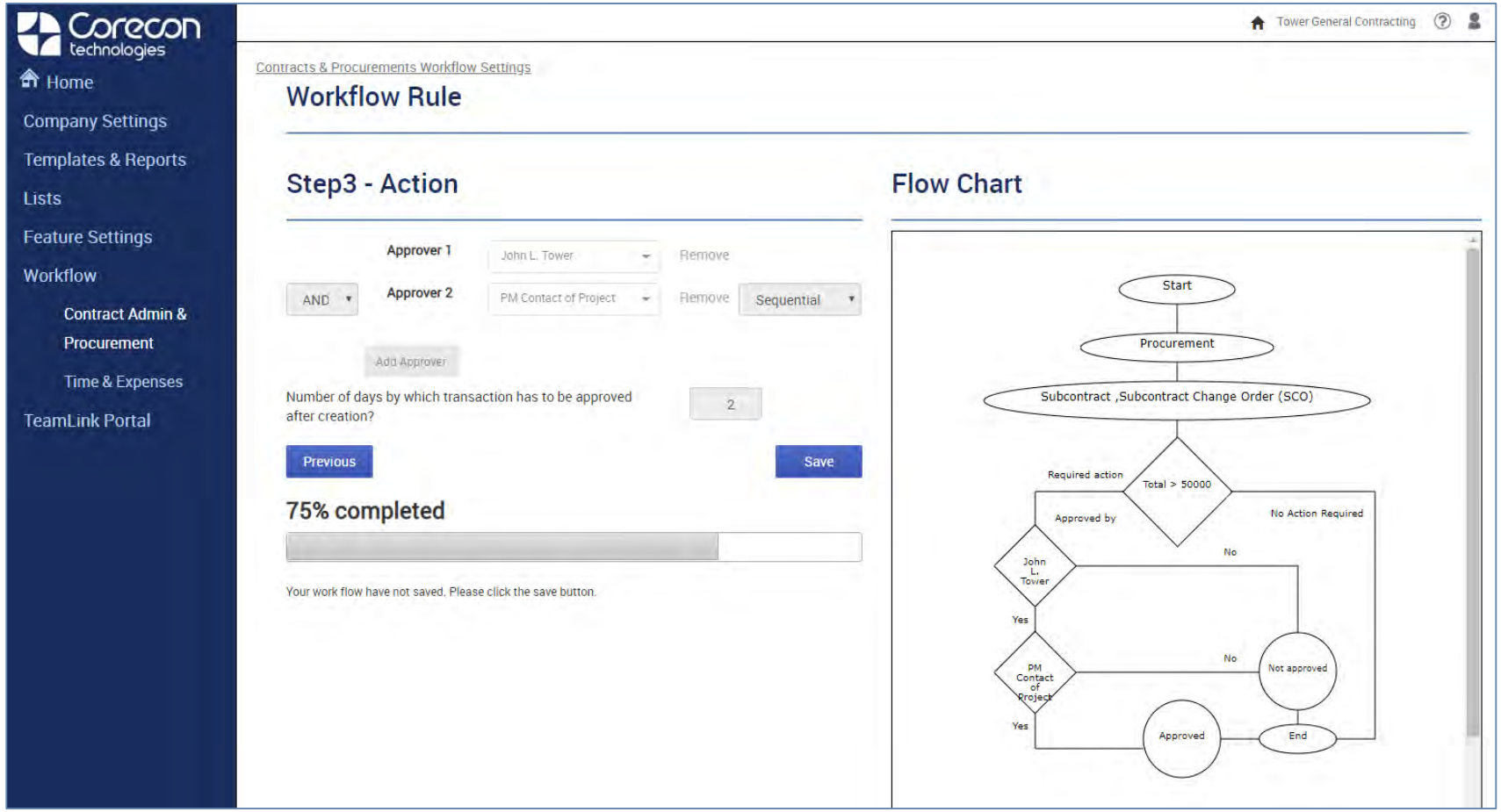
# Corecon - Financial Transaction Approvals

- All Contract Admin, Procurement, and Time Tracking features have status options such as Draft, Pending, Approved, and Not Approved. This is not available in QBD or QBO and provides your staff more control when it comes to project financials.
- Enterprise grade workflow functionality is included in the solution where rules can be established based on transaction type (ex. POs, Subcontracts, Changes, Invoices) and value (ex. > $50K). When enabled, alerts will be automatically sent via email to approvers so transactions can be reviewed in a timely manner.

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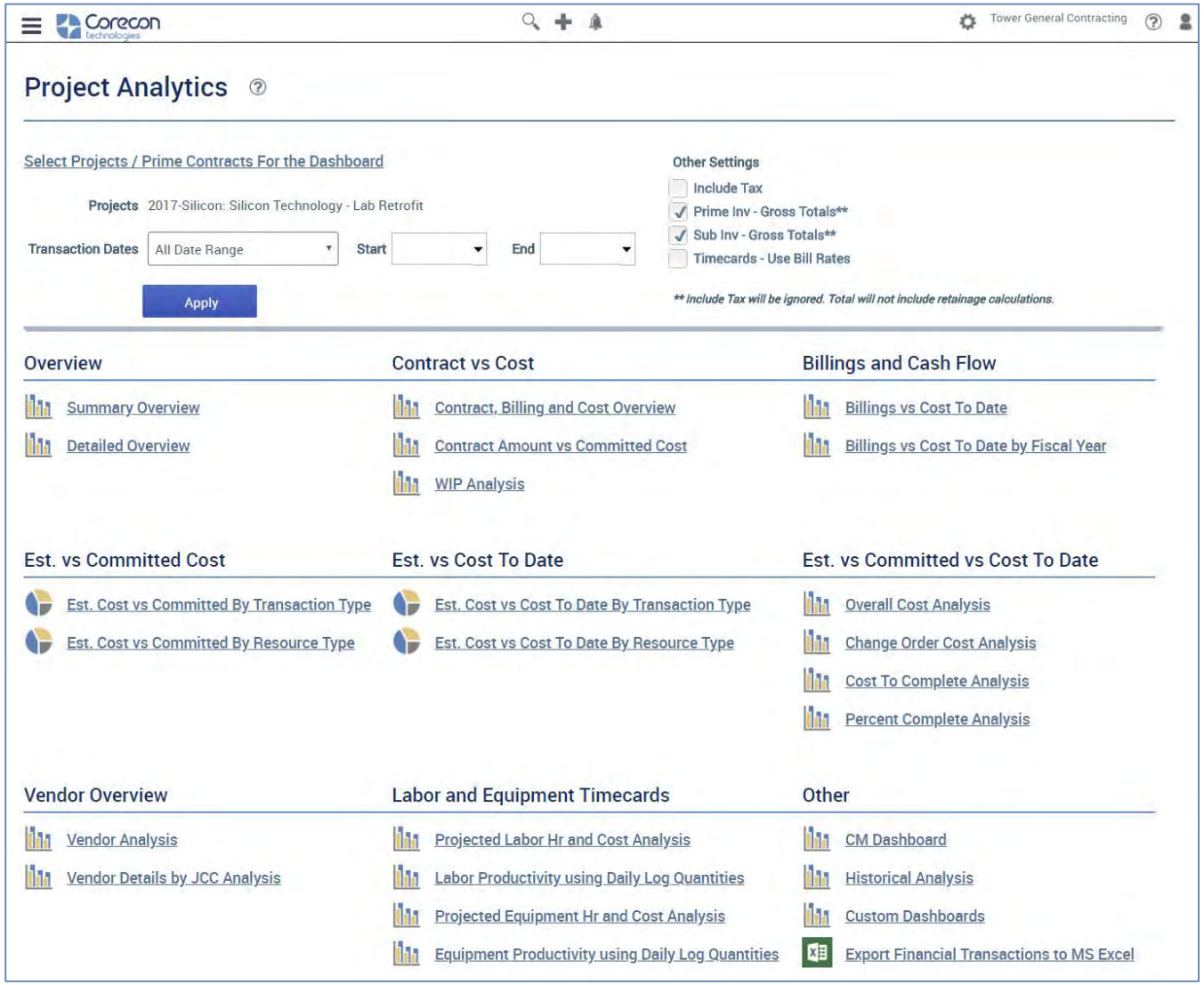
# Corecon - Project Financial Analytics

**Budget tracking or job cost control is a key component for optimal project management, as well as one of the main reasons construction businesses look for new systems. If you feel your software falls short when it comes to handling subcontracts, change orders, progress invoices or budget tracking, then it's time to access the premium resources Corecon brings to the table!**

- Corecon helps avoid cost overruns and production issues by tracking all financial data by project, contract, change order, job cost code, and resource type (ex. M, L, E, S, O).
- Dynamic Executive Dashboards are available to quickly summarize and compare estimated and actual numbers for cost, labor and equipment hours.
- One-click snapshot of profitability across all jobs in progress with drill-down capability for further inspection.

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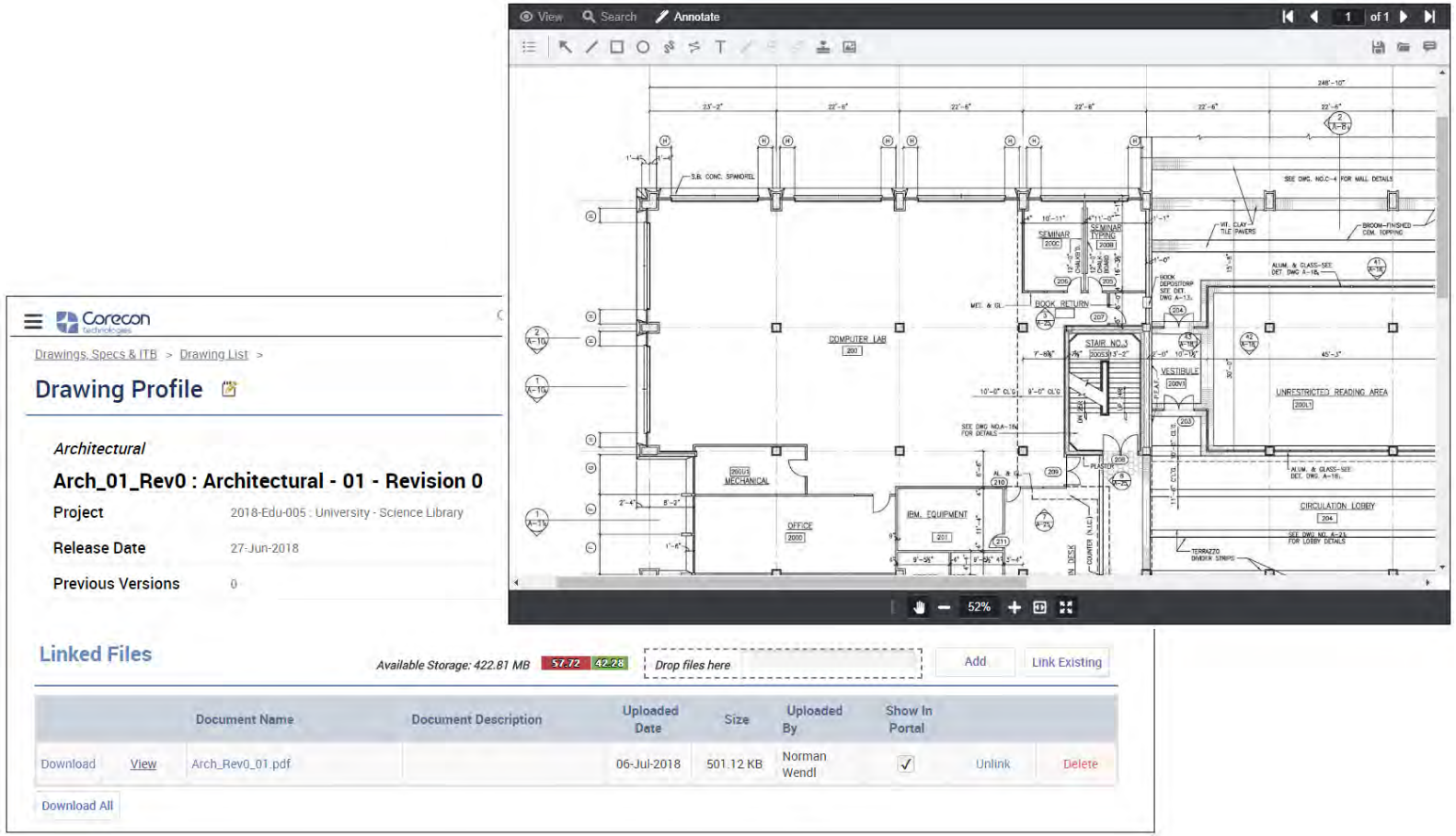
# Corecon - Drawing and Specs Management

Organization and communication is key to successful project management and execution especially when it comes to tracking Drawing and Specification revisions.

**Key Benefits:**

- Provide one source of truth when it comes to drawings and specs for internal and external team members.
- Use Corecon's built-in document viewer and advanced markup tool to highlight areas of interest and add notes. Document viewer supports up to 50 file formats (ex. Images, CAD, PDF) and is available from within Corecon, Mobile Apps, and TeamLink Portal. Thus, team members do not need to download additional applications to collaborate on these types of project documents.

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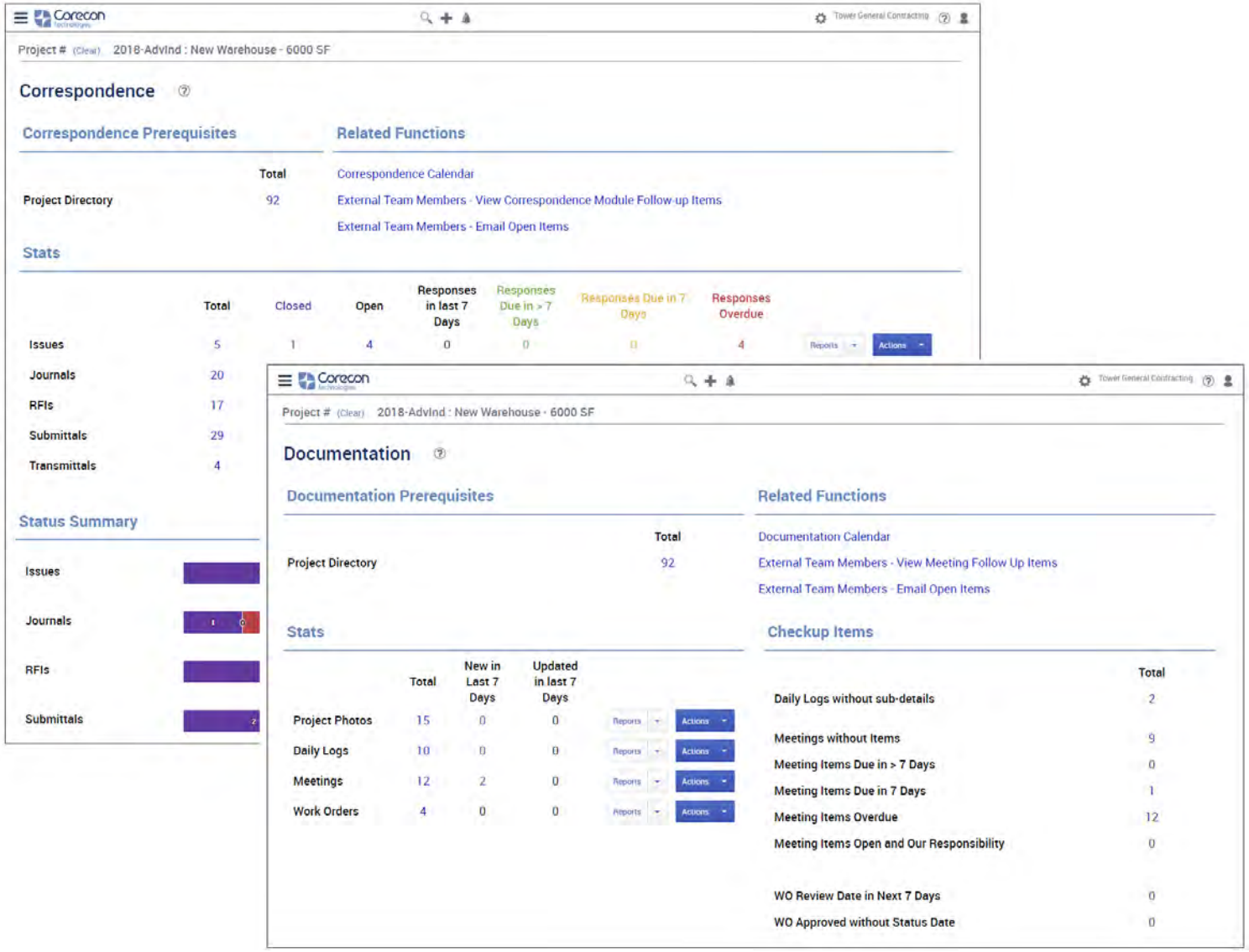
# Corecon - Correspondence & Documentation

- Corecon offers a comprehensive set of features for Project Correspondence and Documentation which will improve communication and coordination. Being cloud-based, project teams will be able to keep track of this information in one central location which will provide greater access for field staff, executives and external team members via the TeamLink Portal.
- Corecon's Calendar and Alerts features provide tools to track time sensitive information and communicate to staff when items are overdue or have been responded to by outside team members.

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# Corecon - Quality Control (QC) and Safety

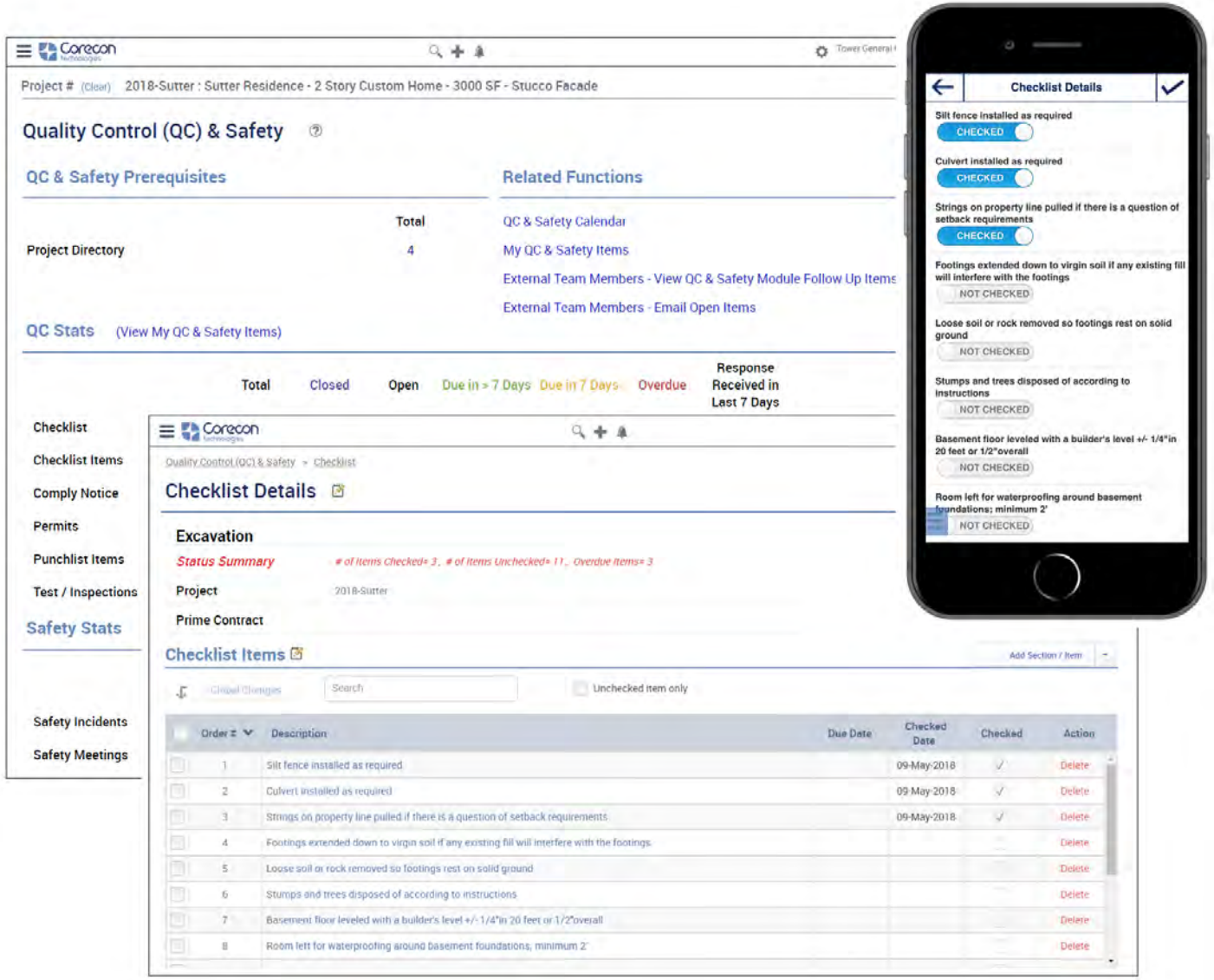
Sacrificing quality or safety of construction personnel is not an option. Corecon's Quality Control (QC) and Safety features prevent mistakes, improve installation times and reduce risk, allowing your firm to grow while maintaining profitability.

**QC Highlights:**

- Create Checklist Templates to ensure quality at every phase (eg. footings, framing, electrical)
- Send Comply Notices to subcontractors for non-performance issues or potential work disruptions
- Document Inspections and Punchlist Items and distribute them via email to assigned parties

**Safety Highlights:**

- If a Safety Incident occurs, keep track of all the necessary information per government agency requirements such as OSHA.
- Site Superintendents can quickly document Safety Meetings held on the jobsite and who attended.
- Complete Site Hazard Assessments at any time

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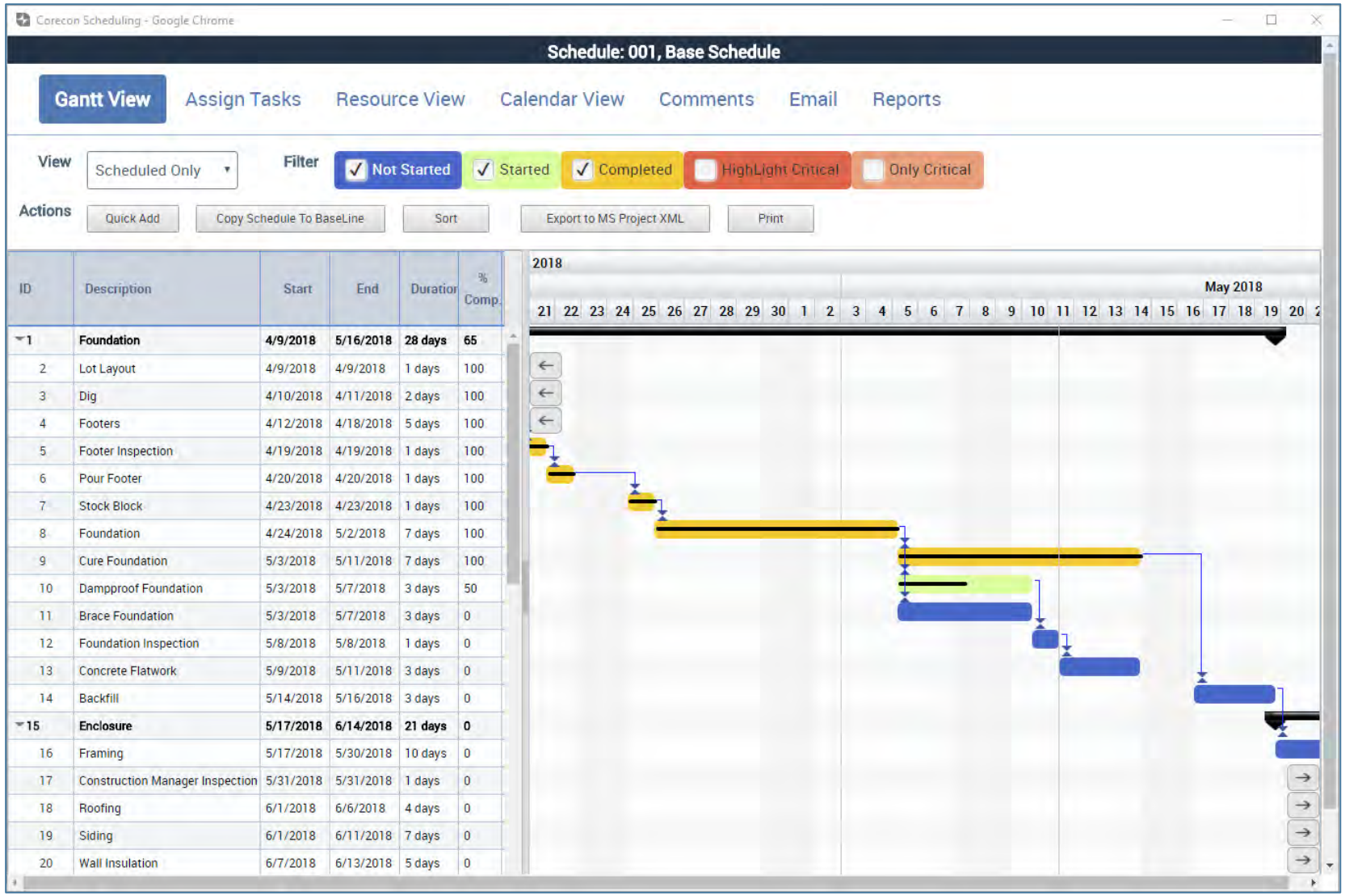
# Corecon - Scheduling

Many firms find themselves unequipped to implement and utilize scheduling solutions after they pass the proposal phase of a project. Whether due to field staff communication gaps or ease-of-use issues, the end result is a missed opportunity for productivity. Corecon's scheduling features make the process simple, encouraging staff to stay engaged and allowing you to keep close tabs on your timelines.

- Distributed project teams can effectively develop, manage and collaborate on their project tasks from any location using a browser or mobile device.
- Tasks can be assigned to vendors, employees, and equipment resources. Email task notifications to employees and vendors directly from the schedule.
- Tools are available to import a Task List from Microsoft Excel, Microsoft Project, or Corecon Estimate.




| ID | Description | Start | End | Duration | % Comp. |
|---|---|---|---|---|---|
| 1 | **Foundation** | **4/9/2018** | **5/16/2018** | **28 days** | **65** |
| 2 | Lot Layout | 4/9/2018 | 4/9/2018 | 1 days | 100 |
| 3 | Dig | 4/10/2018 | 4/11/2018 | 2 days | 100 |
| 4 | Footers | 4/12/2018 | 4/18/2018 | 5 days | 100 |
| 5 | Footer Inspection | 4/19/2018 | 4/19/2018 | 1 days | 100 |
| 6 | Pour Footer | 4/20/2018 | 4/20/2018 | 1 days | 100 |
| 7 | Stock Block | 4/23/2018 | 4/23/2018 | 1 days | 100 |
| 8 | Foundation | 4/24/2018 | 5/2/2018 | 7 days | 100 |
| 9 | Cure Foundation | 5/3/2018 | 5/11/2018 | 7 days | 100 |
| 10 | Dampproof Foundation | 5/3/2018 | 5/7/2018 | 3 days | 50 |
| 11 | Brace Foundation | 5/3/2018 | 5/7/2018 | 3 days | 0 |
| 12 | Foundation Inspection | 5/8/2018 | 5/8/2018 | 1 days | 0 |
| 13 | Concrete Flatwork | 5/9/2018 | 5/11/2018 | 3 days | 0 |
| 14 | Backfill | 5/14/2018 | 5/16/2018 | 3 days | 0 |
| 15 | **Enclosure** | **5/17/2018** | **6/14/2018** | **21 days** | **0** |
| 16 | Framing | 5/17/2018 | 5/30/2018 | 10 days | 0 |
| 17 | Construction Manager Inspection | 5/31/2018 | 5/31/2018 | 1 days | 0 |
| 18 | Roofing | 6/1/2018 | 6/6/2018 | 4 days | 0 |
| 19 | Siding | 6/1/2018 | 6/11/2018 | 7 days | 0 |
| 20 | Wall Insulation | 6/7/2018 | 6/13/2018 | 5 days | 0 |

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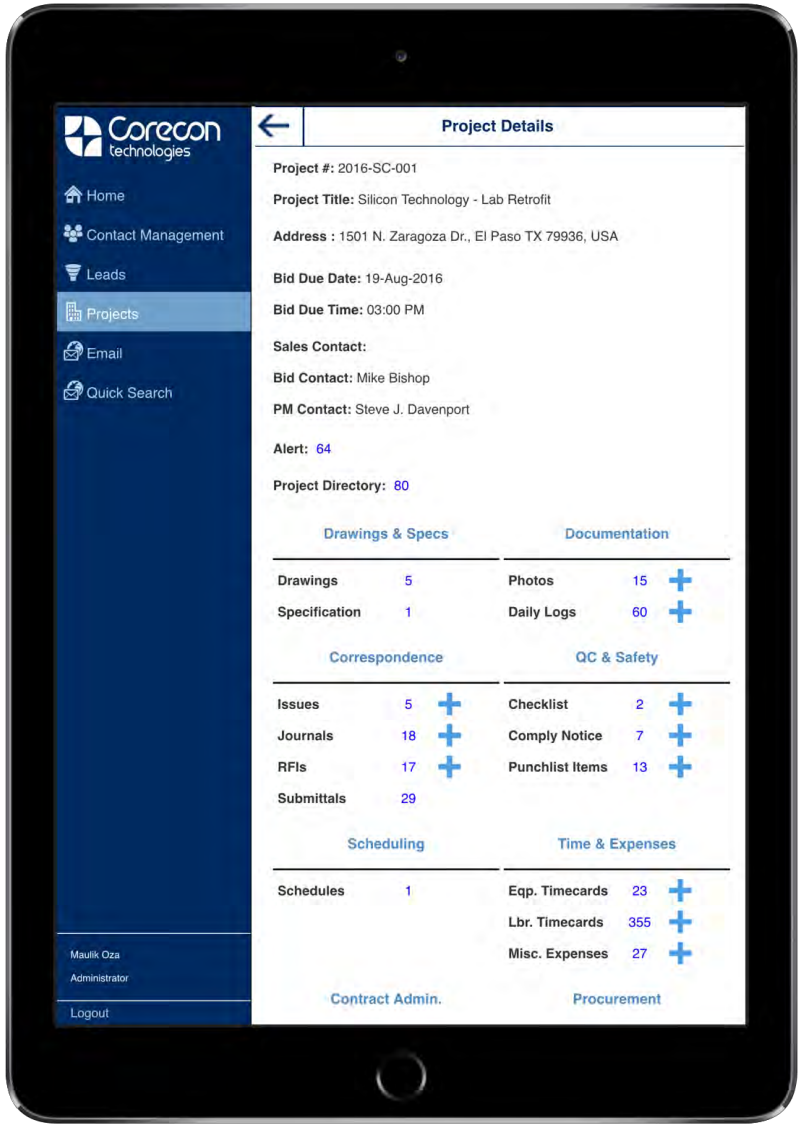
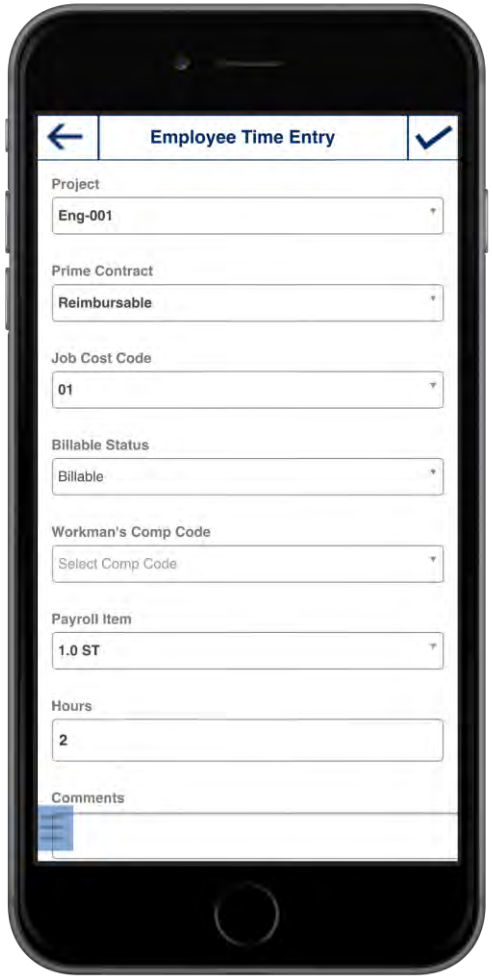
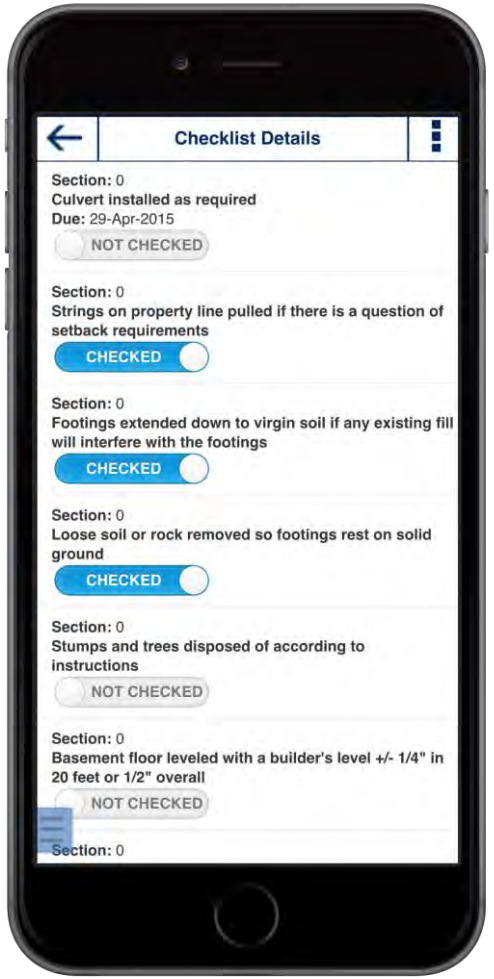
# Corecon Mobile for Field Staff

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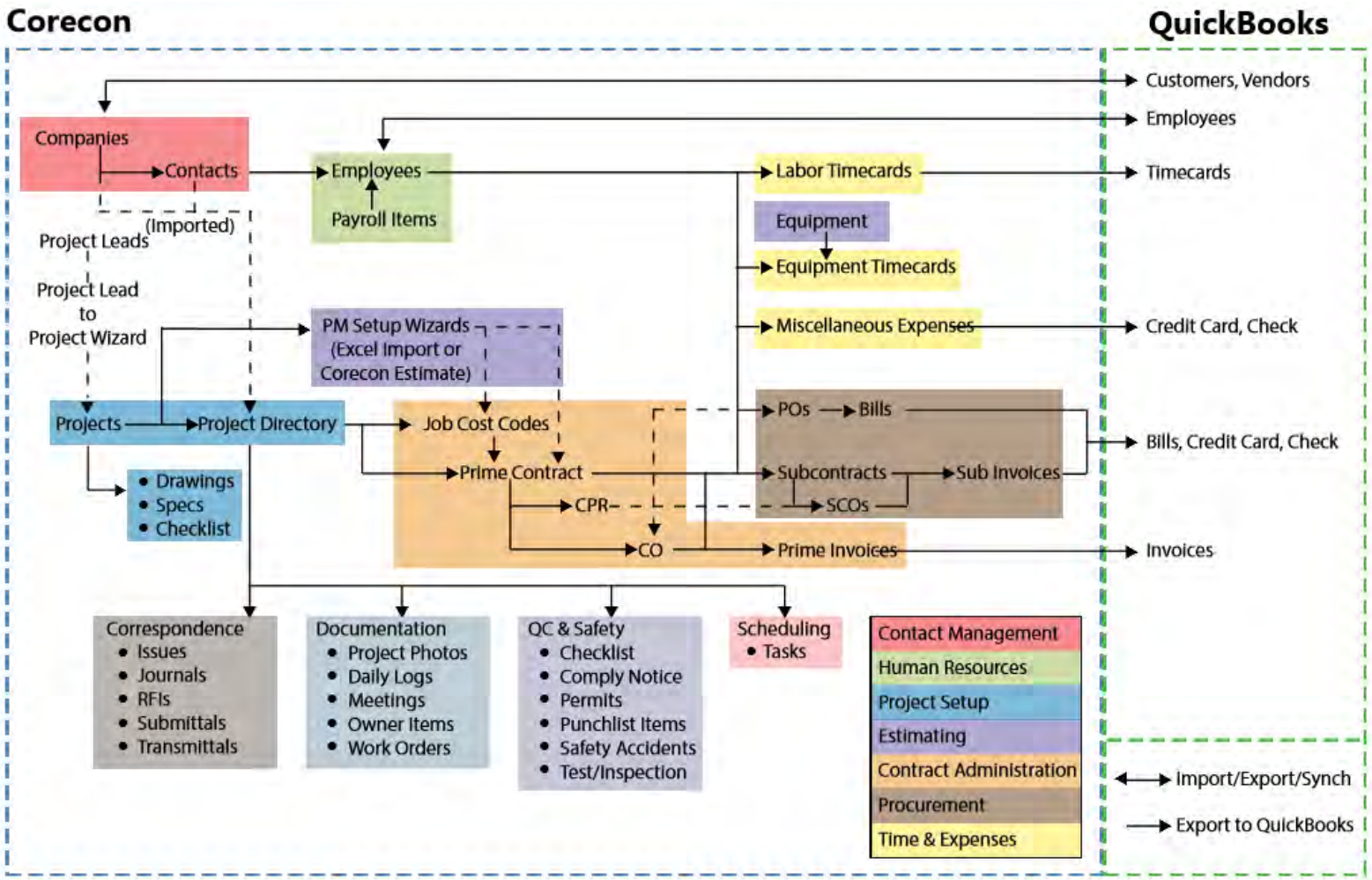
# CoreconLink for QuickBooks - Integration Overview




Business Process Diagram does not show the following:

- CC Tax Codes linked to QB Tax Codes
- CC Job Cost Codes linked to QB Service Items
- CC Payroll Item linked to QB Payroll Item

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# CoreconLink for QuickBooks – Sync Wizard

**Sync is typically run daily by an accounting administrator providing complete control!**

**Sync Functions and Sequence:**

1. Sync Linked Customers and Vendors (Address, Phone, Fax Updates)
2. Sync Linked Employees (Address, Phone, Email Updates)
3. Export Approved Project | Prime Contract (Creates Customer and Job)
4. Export New Vendors referenced on Approved Bills and Sub Invoices
5. Export Approved Bills and Sub Invoices
6. Export Approved Employee Misc. Expenses
7. Export Approved Client/Prime Contract Invoices
8. Export New Employees referenced on Approved Timecards
9. Export Approved Timecards

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# CoreconLink for QuickBooks – Payments

**Check and Deposit information in QBD or QBO can be exported back to Corecon via the Payment function. Typically, this is run weekly by an accounting administrator.**

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# Maintenance & Support Services

## Continuous Innovation & Monitoring

- Corecon manages all updates and upgrades so there are no patches for customers to download or install.
- Corecon also manages availability, so there's no need for customers to add hardware, software or bandwidth as the user base grows.
- 24/7/365 system monitoring
- Nightly backups including weekends

## Knowledge Transfer

- Comprehensive online help system including implementation guides and business process diagrams
- Self-service training videos
- Free live weekly webinars
- User group
- Onsite and online consulting services (fee based)

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