

Your ACC Build & Cost Configuration Checklist

Build Module Configuration

Sheets

- ☐ Are Collections set up to group drawings by discipline, phase, or unit?
- ☐ Are drawing revisions properly published and visible to field teams?

RFIs

- ☐ Do you have a defined workflow for RFI creation, response, and closure?
- ☐ Are roles and permissions set so only the right people can respond or approve?

Submittals

- ☐ Is the submission process clear for subcontractors and internal reviewers?
- ☐ Have you activated the tool with your preferred review workflow?

Issues

- ☐ Have you customized issue types, categories, and statuses to match your project?
- ☐ Are there custom fields required for accurate tracking and reporting?

Files

- ☐ Have you created a folder structure that matches your project delivery needs?
- ☐ Are permissions managed by role or company to limit unnecessary access?

Reports

- ☐ Are custom templates created and saved for consistency across projects?
- ☐ Have you scheduled reports to run automatically for stakeholders?

Assets

- ☐ Are project components registered as trackable assets in the system?
- ☐ Have you enabled QR code tracking for mobile access on-site?

Cost Module Configuration

Budget

- ☐ Has your budget code structure been defined and imported?
- ☐ Are teams actively using the tool to track original, committed, and actual costs?

Contracts

- ☐ Are compliance requirements (WSIB, insurance, etc.) built into your contract process?
- ☐ Can subcontractors upload and manage documentation directly?

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Review Workflows

- ☐ Do your contracts, invoices, and change orders follow a multi-step approval path?
- ☐ Is every action logged with a review trail and timestamp?

Document Generation

- ☐ Have you uploaded your branded templates for key docs (POs, contracts, change orders)?
- ☐ Are system attributes set up to auto-fill project data?

If you have any unchecked to any of the above...

Your ACC setup is costing you time, clarity, and ROI.

Book a free configuration checkup with SolidCAD

Our experts at SolidCAD will assess your workflows, identify risks, and help you design an implementation strategy tailored to your business goals.