



# Integration Drives Streamlined, Real-Time Data Management & Standardizes Processes at ENR 400 Firm

## The Challenge

When the operations team at Charles Perry Partners, Inc. (CPPI), a Gainesville, FL-based general contracting, design-build and construction management firm with about 200 employees, learned that the Oracle Primavera contract management software (a.k.a. Expedition) the company had been using would be discontinued, it needed to find a replacement solution and chose AutoDesk.

Brad Buckles, CPPI's Director of Technology and his colleagues in operations knew that to realize long-term cost savings and productivity improvements which top and senior management expected, the company needed to integrate its project management and accounting software. To meet that objective, CPPI's senior management team formed a Software Selection Committee comprised of executives, accounting managers, and project managers.

In evaluating different solutions, the Committee members also recognized the need for a solution that would integrate project management and accounting software instead of having to rely on project managers to continue manually entering data in duplicate, triplicate, or more. The Committee also knew that CPPI wanted to accelerate its payment cycle to sub-contractors by creating lean accounting processes – a capability facilitated by integration.

## Why Morpheus?

After evaluating multiple integration partners and software solutions, the Software Committee chose Morpheus because of its extensive experience with software integrations in the construction sector. For over 20 years, the Morpheus team has enabled ENR 400 companies to manage complex workflows and business processes between their accounting and project management solutions. CPPI benefits from this experience by having a purpose-built technology that reflects a deep knowledge of construction cost accounting. Buckles believes that he and his colleagues made the right choice because Morpheus “goes above and beyond the scope of work. We can’t ask for someone better to work with. It has been a true partnership since the day we met, and I’m hoping it lasts well into the future.”

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- **Brad Buckles**, Director of Technology

## The Solution

Morpheus helped CPPI integrate Autodesk's construction software, Build, and their ERP, Sage 300 CRE, into a single, user-friendly solution. Buckles likens the project management and accounting software packages to "married people who often fight" and Morpheus's integration solution to "a counselor who helps them get along."

Buckles appreciates the Morpheus-led integration because "it's a 'Choose Your Own Adventure' experience instead of a cookie cutter approach." He is especially pleased that Morpheus gives CPPI the ability to configure the software to its processes, so he and his team do not have to change internal procedures to fit the software's requirements.

According to Buckles, "The combination of training that Morpheus provided, along with process documentation and standard operating procedures we developed internally, gives project managers and others throughout the company who use the Autodesk and Sage software the ability to clearly see the value of the integration."

An added advantage of the Morpheus platform is that if CPPI wants to integrate other applications in the future, Buckles knows that Morpheus can accommodate their needs. That is, Morpheus can integrate any application to meet the needs of a growing company like CPPI.

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## The Benefits

Because the integration has yielded an intuitive, user-friendly solution, project managers have significantly improved their productivity by using the integrated software instead of filling out spreadsheets and change orders manually. They have also eliminated the need to send emails with large numbers of attachments, as well as made distant memories of other time-consuming processes.

In specific terms, the integration has given project managers and other managers within CPPI near-real-time views of projects. The integration makes this improvement possible by enabling the Accounting Department to populate spreadsheets with relevant data in a mere *10 minutes* compared to the two days it used to take – *a 99% time savings!*

In a related function, change orders that project managers issue automatically go to the Accounting Department and get entered into work orders. As a result, there is *zero probability of data entry errors occurring*. As Buckles puts it, "People are touching data only one time instead of multiple times."

Likewise, job codes and cost codes automatically populate spreadsheets with accurate, real-time data, allowing project managers to devote less time to poring over spreadsheets and more time to focusing on whether, for example, using a sub-contract or work order would be most efficient for a particular job.

Since the integration occurred in mid-2022, CPPI is getting more productivity from team members in Accounting, Project Management, and across other departments and functions. For the first time ever, team members have the freedom to focus exclusively on the strategic and tactical challenges that make their jobs most fulfilling and add maximum value to client relationships instead of being burdened with data entry and verification, and other repetitive, less enjoyable, non-value-added tasks.

### WHY MORPHEUS?



**FULLY  
AUTOMATED**



**COMPLETE  
CONTROL**



**ENDLESSLY  
CONFIGURABLE**