Sage 300
Construction and Real Estate

Connecting your business in ways no other solution can.

People. Projects. Processes. Properties.

Sage 300 Construction and Real Estate (formerly Sage Timberline Office) connects them all—in ways no other solution can. By integrating your business at all levels and solving the construction- and real-estate-specific challenges your company faces, Sage 300 emboldens you to achieve your financial and productivity goals. Information

is easier to access whether you're in the office or in the field. People collaborate more effectively. Projects progress predictably.

To illustrate how Sage brings your teams and processes together, we'll walk you through some common business situations you might relate to.

Finances $

Projects/ Operations

People

Service

Real Estate

Finances

$

Because there are so many unknowns in the execution of construction projects— and because there is such a thin margin for profit—it's critical to have accurate, timely control over your accounting and financial processes. Sage 300 Construction and Real Estate empowers your financial team to make decisions and execute tasks without hitting the stop button on projects. With GAAP-compliant methods and clear business visibility, Sage 300 is both the last line of defense in avoiding unnecessary risk and the driving force for making positive changes to improve your company's financial health.

Click to learn how these individuals are addressing their daily business challenges.

Company Owner

Chief Financial Officer

Accounting Manager

Company Owner

The current construction market has made it necessary for Phillip to squeeze every penny of profit from his jobs.

Lately, his company has been forced to take jobs at razor-thin margins. This means, as the company owner, he must be vigilant about financial and operational performance at all levels of the business.

Sage 300 Construction and Real Estate is mission control.

In order to keep his finger on the pulse of his company, it's absolutely critical that Phillip have current and accurate information. That's one of the key reasons he moved ahead with the decision to implement Sage 300.

Whereas Phillip used to have to meet with staff, send numerous emails, or request reports to get the information he needed, today it's all available in a click. When he logs into his computer, the Sage Desktop presents him with all of the critical business indicators that are essential to monitoring business performance.

A reporting and information powerhouse.

Anytime Phillip needs to dig into the efficiency of the business or the profitability of an individual project, Sage 300 has his back. For example, like any savvy business owner, Phillip understands that cash is king. With projects front-end loaded with cash outlays for materials and labor, it's critical to analyze finances carefully. Plus, Sage Construction Anywhere enables Phillip to check out project overviews over his morning cup of coffee.

Report Designer, Inquiry Designer, and Office Connector are tools that allow project managers, operations managers, and other staff to format reports and present information in ways that are most meaningful to Phillip. Plus, the team can easily create statements that meet the specifications and requirements of lenders and bonding agents.

Company Owner (continued)

Sage 300 also keeps Phillip "in-the-know" with an email alert system called MyAssistant. For example, whenever a project drops below a 3% profit threshold, the system triggers an email—notifying Phillip and giving him ample time to take action and make the appropriate inquiries with his staff.

Three years ago, Phillip's company had a clerical and accounting staff of 12. Since implementing Sage 300, the company's volume has increased but they are able to operate with a staff of seven and have more accurate and timely information than ever before.

Phillip's business simply wouldn't be where it is today without Sage 300.

Tools Used

- Sage Desktop
- Report Designer
- Inquiry Designer
- Office Connector
- MyAssistant
- General Ledger

Other Resources

Customer Success Stories

- Tercera Construction
- Dean Crowder Construction

Customer Success Videos

- Thor Construction
- Dean Crowder Construction

Demo

- Sage 300 Construction and Real Estate
- Sage Construction Anywhere

Whitepapers

- Enabling Mobility in your Construction Firm

Chief Financial Officer

Walter is the Ebenezer Scrooge of his company. Not because he's a penny pincher but because he's always thinking about the past, present, and future.

His three core duties are to report on historical financial information, manage the company's present financial position, and forecast financial strategies to secure the future.

Basing decisions on facts, not gut instinct.

Nearly every decision Walter makes can have a "butterfly effect" that reverberates throughout the company for years to come. So in order to make the best decisions possible, he does what any good CFO does: analyze and scrutinize.

By implementing Sage 300, Walter has gone from mired in details to focused on the future. Each day starts with a review of the Sage Desktop, provides a dashboard type view of information showing Walter his key performance indicator such as liquidity and cash flow. Plus, he can instantly see AR and AP Aging, Job Profit and Job Billing summaries. If Walter needs more information in a given area, he can simply drill-down into an area such as Billing and see what's been billed, paid and what the total receivables are.

Sage 300 MyAssistant also keeps Walter informed by automatically sending him an email alert when certain conditions are met. For example, when a project drops below a 3% profit threshold or when their receivables balance crosses the 90-day overdue mark. Walter now has the information at hand to make well-informed decisions and course correction adjustments as necessary.

Chief Financial Officer (continued)

Fast access to reports, financial statements, and forecasts.

Another key responsibility for Walter is to demonstrate the company's financial position to the executive team, clients, banks, and surety companies. On occasion, these parties will request to see certain information that Walter typically doesn't include in his reports. This used to put him in quite the pickle, requiring an outside consultant or IT expert to build a new report.

With Sage 300, Walter can use the Inquiry Designer to display practically any information he wants—without needing to bring in an expert to recode the software. Plus Sage 300 works hand in hand with productivity tools like Crystal Reports, Microsoft Excel, and Office Connector so it's always easy to view, manage or change data in the format that's most convenient.

Sage 300 helps make the company's past, present, and future a whole lot more secure.

Tools Used

- Sage Desktop
- MyAssistant
- Inquiry Designer
- General Ledger
- Office Connector
- Financial Statement Designer
- Crystal Reports
- Document Management

Other Resources

Customer Success Stories

- Ecker Enterprises
- Interstate Restoration

Customer Success Videos

- Thor Construction

Demo

- Sage 300 Construction and Real Estate

Whitepapers

- Achieve More Intelligent Construction Through Data Analysis
- How best to position your construction company to a surety in 2013.

Accounting Manager

The accounting team is the circulatory system for any business. And the construction firm Joanne works for is no exception.

As the accounting manager, Joanne handles many of the financial details that drive the business. In addition to keeping the books and paying the bills, she and her three-person team are responsible for financial reporting and compliance tracking. They also seem to get stuck with tasks that overflow from other groups.

Bookkeeping bedlam.

When Joanne first joined the company, they were using a basic bookkeeping program.

She could never get the specific reports she needed out of the system. Plus too much time was spent on manual processes such as bonding and union reporting, which she tracked on spreadsheets outside the accounting software. It was an error-riddled mess.

While attending an industry conference with a couple of her colleagues, Joanne had one of those aha moments. She heard about Sage 300 Construction and Real Estate (formerly Sage Timberline Office) and started to see how simpler things could be with a construction-specific solution.

An end to chaos.

Since implementing Sage 300, the accounting team has raised the bar on the level of service it provides to other groups throughout the company. Joanne is able to manage cash flow more strategically—invoicing more quickly, reducing the number of overdue invoices, and an added benefit of paying vendors on time—taking advantage of vendor discounts. Plus the reports she's able to generate gives her boss and other managers the details they need to make well-informed, timely decisions.

Accounting Manager (continued)

In addition her team now uses one centralized system to manage subcontractor compliance such as tracking lien waivers, proof of insurance, and certified payroll reports—and benefits from more automation and system alerts that shorten their work and help them better keep the company out of hot water.

No longer a paper pusher.

Whereas the office used to have to deal with an onslaught of paper files and documents, now things are practically paper-free thanks to Sage 300 Document Management. Electronic files make it easy to route documents and get approval, which means Joanne's team is no longer a bottleneck for projects.

The bottom line? With Sage 300, Joanne's team is able to do its part to keep the company financially fit, compliant, and competitive.

Sage 300 provides the power to do more.

Tools Used

- Sage Desktop
- MyAssistant
- Office Connector
- Accounts Payable
- Inquiry Designer
- Report Designer
- Accounts Receivable
- General Ledger
- Sage 300 Brochure
- Document Management

Other Resources

Customer Success Stories
- Thor Construction

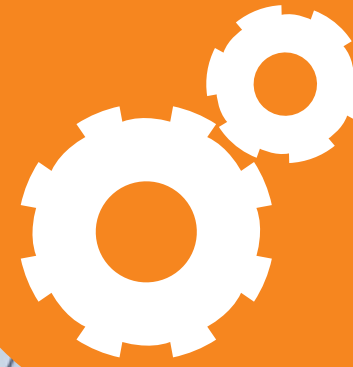**Customer Success Videos**
- Thor Construction
- Dean Crowder Construction

Demo
- Sage 300 Construction and Real Estate
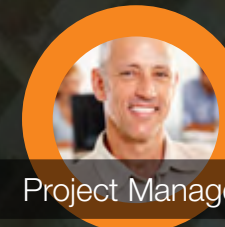
Projects/Operations

Sage 300 simplifies and streamlines the way you manage your projects and your operations. Estimating, Job Cost and Project Management are all connected. And your people, whether in the field or in the office, are connected to the information that matters most. As a direct result of this connectivity, team productivity soars and your projects progress with fewer interruptions and risks.

Click to learn how these individuals are addressing their daily business challenges.
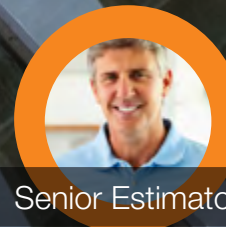
Senior Estimator

Project Manager

Operations Manager

Superintendent

Estimator

Before Pete started using Sage Estimating, his days started early and he was one of the last to leave the office. He was good at his job but knew there had to be a better way.

Over the years he had "perfected" the spreadsheet that he used to put together estimates. It worked okay but more times than Pete cared to admit his company was awarded jobs that were . . . well . . . a bit less than profitable. Hidden cells. Mistakenly deleted formulas. Guesstimates. They all came back to bite him more than once. What's worse, he just didn't have the time to scrutinize his estimates and make sure he had crossed every "t" and dotted every "i."

Now times are better.

Today, Pete and all the other estimators in the company are using Sage Estimating. Everyone is on the same page and Pete is able to generate more estimates faster than ever before and do it without jeopardizing accuracy. Calculating quantities, dimensions, and counts is a snap using pricing databases and onscreen takeoff tools. Last minute adjustments are quick and painless. Plus Pete can use historical estimates to track the probability and profitability of future jobs.

Pete is more confident than ever that his estimated costs will be accurate from the time the shovel pierces the dirt until the project is complete. And that's a good thing because Mike, the company's top project manager is a real stickler for details.

The power of connectivity.

At the same time the company rolled out Sage Estimating, it rolled out Sage 300 Construction and Real Estate. The solutions work together, which makes the entire company work better together. Now Pete and

Estimator (continued)

his fellow estimators are able to easily share all of the details on a bid with Mike and his project management team. Plus Jenny in accounting doesn't have to manually create job cost budgets or purchase orders from an estimate. It's all automated so there's no fuss.

It's better estimating by every measure.

With Sage Estimating, Pete is able to generate more estimates faster than ever before and do it without jeopardizing accuracy.

Tools Used

- Sage Estimating
- Model/Conceptual Estimating
- ePlan Takeoff
- Advanced Assembly Databases
- RS Means Databases
- Project Management

Other Resources

Customer Success Stories

- Echo Pacific
- Rudolph and Sletten

Customer Success Videos

- Echo Pacific
- Rudolph and Sletten

Demo

- Sage Estimating

Project Manager

Mike's role is easily summed up: Bring projects in on time and on budget.

It sounds simple enough but there are a lot of levers to pull and buttons to push in order to keep projects moving and ensure a healthy profit margin. The volume of details and processes can be staggering. Schedules. Budgets. Documents. Subcontractor compliance. RFIs. Submittals. And let's not forget one of his biggest challenges—change orders.

Before implementing Sage 300 Construction and Real Estate, Mike found himself struggling to keep everything organized and under control. His days were pressure filled. He rarely had access to timely information about his projects, which led to work stoppages or forced him to act based on gut instinct instead of hard data.

More visibility means less downtime.

Implementing Sage 300 enabled Mike to reinvent himself. Whereas he used to be a "problem solver" now his colleagues call him a "problem preventer." Instead of reacting to issues that come up on the job site, he has the timely information access he needs to make adjustments and course corrections to prevent a catastrophe.

For example, let's say Mike wants to see what cost codes are at risk of going over budget. With a few clicks of his mouse or taps on his iPad, that data is available on his screen. He can drill down into the details to see what's causing the problem and act decisively to get it back on track. If he needs to know when a subcontractor has an expiring insurance certificate, he can set the system to automatically email him a project alert 30 days prior to it expiring.

Change orders run smoother with Sage 300.

Administering change requests and change orders used to be a nightmare for Mike. Despite his best intentions, he had difficulty getting

them approved by all parties in a timely fashion. Today, using the Sage 300 [Project Management](#) module, Mike can convert an RFI into a change request and send the proposed change to Phillip, the owner of the building, for approval—all with the click of a button. Subsequently, he can track the status of change orders—from request, to pending, to verbal okay, to approved—all from a single screen.

Other processes like scheduling, budgeting, and billing are much more efficient, too.

Now Mike is freed up to do what he enjoys most and what got him started in this business— building things!

Tools Used

- [Project Management](#)
- [Office Connector](#)
- [Billing](#)
- [Job Cost](#)
- [Document Management](#)
- [MyAssistant](#)
- [Sage Desktop](#)
- [Sage Construction Anywhere](#)
- [Sage 300 Brochure](#)

Other Resources

Customer Success Stories

- [Dean Crowder Construction](#)

Customer Success Videos

- [Thor Construction](#)
- [Dean Crowder Contruction](#)

Demo

- [Profit Erosion](#)

Whitepaper

- [Litigation Risk Management](#)
- [The Benefits of Document Management](#)

Operations Manager

If Jake had to sum up his typical day as an operations manager, the first question he'd ask is "which day?"

On Monday he was trying to dig into a problem on one of their biggest jobs. Tuesday was spent in a team meeting discussing their next project. Wednesday and Thursday he was onsite supporting his estimators by getting a firsthand look at the site logistics for a project they were bidding.

With so many responsibilities, his job requires open communication, clear visibility into operational and project details, and decisive decision making. Sage 300 Construction and Real Estate helps with all three job requirements.

Jake sees the big picture. And the nitty-gritty details.

With Sage 300, Jake rarely gets blindsided by project missteps. At any time, he has a variety of methods to monitor and analyze company and project data, including pulling it into Excel, which he's always been comfortable with. The system even provides automated email alerts so he knows the second an issue arises, such as a job that has fallen below a specific profit threshold or a project manager's monthly forecasts are overdue. Better still, he stays connected whether he's in the office, at a client meeting, or on a jobsite through his tablet and smartphone.

Working together works better.

Clear communication with project managers, subcontractors, clients, and company leaders is crucial. The company used to manage plans and drawings through a paper-based system. As a result, details used to slip through the cracks and bottlenecks would slow projects down.

Now all those details are managed through Sage Construction Anywhere, a virtual project hub, allowing the entire project team to easily share and retrieve the latest project documents, drawings, and photos from any location, ensuring everyone is planning and acting with common and current project information.

Operations Manager (continued)

Plus the Sage 300 Job Cost module helps Jake ensure his projects are staying within budget. And Project Management enables him to keep track of rfi's, submittals, change orders, change requests, meeting minutes, notes, and conversations that used to get lost in the shuffle of emails and everyone's busy schedules.

The buck stops with Jake because Jake starts his day with Sage 300.

With Sage 300, Jake rarely gets blindsided by project missteps . . . The system even provides automated email alerts so he knows the second an issue arises.

Tools Used

- Office Connector
- Project Management
- Sage Construction Anywhere
- MyAssistant
- Sage 300 Brochure

Other Resources

Customer Success Videos

- Dean Crowder Construction

Website

- Sage Construction Anywhere

Whitepaper

- Litigation Risk Management

Superintendent

By the time Sam has finished his first cup of coffee, he's typically got a list of issues that need to be addressed.

Today is no exception. A critical delivery hasn't arrived yet. Yesterday's HVAC installation needs attention. And the project manager is in his ear about labor costs, which are currently running 2% over budget.

In the past, these kinds of challenges would have completely blindsided him, sending him scurrying for answers. He'd need to make calls to his sub, send emails to purchasing folks back at the office, chase down paper timesheets, and dig through project binders. But since the company implemented Sage 300 Construction and Real Estate, along with Sage Construction Anywhere, most of the issues that come up don't rattle Sam anymore.

Sam sums up the improvement provided by Sage in one word: simplicity.

Take employee time tracking and approval, for example. For every project, labor is the single biggest factor in a project's profitability. It's critical for Sam to ensure hours entered are accurate. Even small mistakes can have big consequences. The old way involved paper timesheets, sometimes turned in several days late with too much reliance on memory. With so much to keep track, accuracy was often in question.

Now the company has gone mobile. All workers use a mobile app to enter their time each day on their smartphone or tablet. Sam and the project manager can then easily review, adjust, and approve time online at any time, from any location. It's easier to link the time worked directly to the site activities performed, which improves cost and productivity reporting and takes a load off Sam's shoulders. Plus the accounting team has the full detail they need much sooner to tackle payroll and create the job cost reports that help Sam course-correct labor overruns and issues faster.

Project details, anywhere. Even behind the controls of a bulldozer.

Another key advantage with Sage is instant access to project information. For Sam and his crew, it was such a time waster to be on a piece

of equipment and need to shut everything down, climb out, and walk over to the trailer to get a document or drawing. Truth be told, more times than not they went with their gut, which often led to mistakes that required fixing later. Now, anyone in the field is able to look down at an iPad and pull up a drawing instantly to confirm they are on the right track. It has saved time and reduced rework.

Working better, together.

What's more, it's not only Sam's direct employees that are seeing the benefits of Sage 300 paired with Sage Construction Anywhere. All

project team members, including subcontractors and suppliers, have access to up-to-date project information, documentation, drawings, photos, and schedules through a shared online portal. Sam's company has full control over who sees what. As a result, Sam has been able to offload some accountability to others to ensure they are planning and acting with the latest project documentation available.

One final and unexpected benefit? Sam now has time for a second cup of coffee in the morning, not to mention a lot fewer challenges to deal with.

Tools Used

- Sage Construction Anywhere
- Sage 300 Construction Brochure
- Project Management
- Sage Desktop

Other Resources

Customer Success Stories
- Dean Crowder Construction

Customer Success Videos
- Dean Crowder Construction

Demo
- Sage Construction Anywhere

Whitepapers
- Enabling Mobility in your Construction Firm

Website
- Sage Construction Anywhere

People
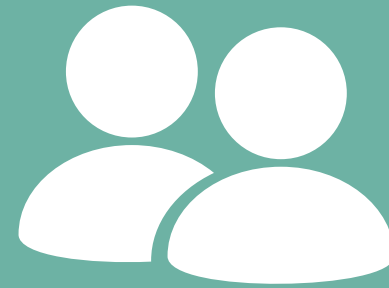
Managing people and payroll is never straightforward, no matter what the line of work. However, few businesses face as much red tape as construction firms. Unionized labor. High turnover. Subcontractors. Variable hours and pay rates. Certified payroll for government work. These issues and other logistical concerns conspire to create a potentially hyper-complex environment. Sage 300 is Job Ready, enabling you to prepare payroll, manage workers and subcontractors, and comply with regulations with minimal paperwork—so you can focus on core activities.

Click to learn how these individuals are addressing their daily business challenges.

Payroll and Office Manager

Payroll and Office Manager

Jane's coworkers joke a lot that she wears many hats. Over the course of a day, she might be an office manager, a payroll clerk, and an HR manager.

Lately, life has gotten much easier because she's started wearing a single hat—the hat of a Sage 300 Construction and Real Estate user.

Mastering payroll and HR tasks.

Jane now has a one-stop source to help her oversee what's going on and complete tasks across her many responsibilities. For example, payroll used to be a major source of stress. She deals with sticky issues like union dues, workers' compensation, drug testing, licenses, certifications, overtime, and time approval. The Sage 300 Payroll module is up to the task.

Jane can easily set up employees, approve their hours, and make sure everyone gets paid on time.

Since all the jobsite superintendents and workers are also using Sage Construction Anywhere to enter and approve time, Jane doesn't have to chase down or manually enter timesheets anymore. They flow into the system automatically, saving time and improving accuracy.

The software also provides over 70 HR forms related to tasks such as evaluations, applications, discipline termination and new hires. In just a click, Jane can print a complete package with all the required documentation to hire or terminate an employee. Considering the amount of turnover and the number of seasonal employees there are, it's tough to calculate just how many hours Sage 300 saves Jane on completing paperwork.

The time-savings don't stop there. Sage 300 also offers integration to the Aatrix eFiling Service, which populates much of the form automatically and reduces administrative overhead even further. They provide simple access and electronic filing services for over 250 state and federal forms.

Subcontractor management simplified.

One of Jane's favorite features in Sage 300 is subcontractor compliance. As an Office Manager she's responsible for Accounts Payable check runs. The software actually warns her throughout the invoice process when something is amiss. For example, if a sub has an outstanding lien waiver or an expired insurance certificate, Jane can temporarily block the check from printing until the compliance issue is rectified. And those compliance issues happen far less frequently because Sage 300 provides an alert system that sends an automatic email notification giving the subcontractors ample notice to take action.

While her company moves more towards a paperless office, Jane finds Document Management extremely valuable. She regularly references important company files with a simple mouse-click and without ever leaving her desk. She also appreciates the built-in routing feature that she uses regularly for document approvals such as invoices.

By eliminating time-consuming administrative tasks, Sage 300 has made it easier for Jane to do her job.

Does anyone need a used hat rack?

Tools Used

- Payroll
- MyAssistant
- Accounts Payable
- Sage Construction Anywhere
- Document Management

Other Resources

Customer Success Stories

- Ecker Enterprises
- Amelie Construction and Supply

Customer Success Videos

- Thor Construction
- Dean Crowder Construction

Demo

- Sage Construction Anywhere

Websites

- Aatrix efiling Services

Service

Contractors who provide field service are faced with higher customer expectations in an increasingly competitive economic environment. Sage 300 is the competitive edge you need to not only survive but to thrive. It's built to improve service levels and maximize profit by emboldening you to schedule appointments more simply, reduce parts inventory costs, and collaborate more effectively between the office and field technicians.

Click to learn how these individuals are addressing their daily business challenges.

Service Manager

Dispatcher

Service Technician

Service Manager

Cory used to have data in every nook and cranny of his service department. He and his team would keep vital information on sticky notes, emails, notepads, whiteboards and spreadsheets.

Now, when he looks back on the way he used to get things done, Cory quips that it was the Dark Age.

One place for every detail.

Since the company rolled out Sage 300 Service Management, Cory has successfully ditched the sticky note system. Schedules, job tickets, work orders, and contracts are all saved in one place. Now he and his team can focus on getting the work done rather than wasting valuable minutes on back-and-forth emails and phone calls.

The nerve center for Cory's team is the Sage 300 dispatch board. From within this friendly and flexible solution, Cory can get the lay of the land—monitoring the progress of worksites from start to completion. For example, if he wants to check up on a job, he can quickly see who is where, what work they're performing, and how long it's expected to take. Cory's team can easily assign the right technician—with the right skills— to the right call, as well as ensure their workload is efficiently balanced between service calls and regularly scheduled maintenance. Bottom line, Cory's department is able to make the best use of its resources while maximizing revenue and becoming more responsive to customers. It's a win/win in Cory's mind.

From taking calls, scheduling and dispatching technicians, stocking parts, getting work orders in and out, Cory's team now hums along like a well-oiled machine.

Saving time all along the way.

As work is completed, technicians enter their labor hours and the information is automatically populated on the work orders for invoicing, as well as in payroll. This saves people like Judy in accounting the hassle of having to rekey information.

Under the previous manual and spreadsheet-based system, one of the greatest sources of Cory's frustration was managing inventory and ordering parts. His warehouse

person would have to go line by line through a spreadsheet to check what was ordered and what had been used, but more often than not, the information was inaccurate, which led to delays and customer complaints.

Today, the company uses the Sage 300 Service Inventory solution, which Cory has set up to automatically reorder parts when quantities are depleted. Parts that appear on work orders flow to Service Inventory, which triggers an order when a predetermined quantity is reached. Invoices are, in turn, automatically posted to accounts payable.

Cory runs a tight ship.

Thanks to Service Management, Cory has better visibility into all aspects of his department. Overall, he has a better understanding of what jobs are driving their revenue and profit as well as which technicians are the most efficient. Results of operational improvements are a higher level of customer satisfaction and better cash flow management.

For Cory and his team, this is the age of simplicity.

Tools Used

- Service Management
- Preventive Maintenance and Service Agreements
- Service Purchasing
- Service Inventory
- Service Messaging
- MyAssistant

Other Resources

Screenshots

- Service Management Dispatch Board

Websites

- Development Partner Solutions

Dispatcher

Craig's old system for dispatching service workers was a mess.

The process he used for tracking everything included a bulletin board, a calendar, email, and spreadsheets. Some days it seemed like the entire service team was held together with bubblegum and bailing wire.

Bulletin board breakdowns.

Much of Craig's day used to be spent looking at the office whiteboard, which served as his dispatch board. This is where he'd move around each technician's daily workload and add or remove job tickets. Those same job tickets also needed to be tracked in a separate calendar for long-term job forecasting. Making sure both schedules were in alignment was a nightmare.

What we have here is a failure to communicate.

Even more time-consuming, the old way of communicating with technicians was a string of back-and-forth texts and phone calls regarding parts needed and other general information about each job. Craig would attempt to respond to requests quickly and track each technician's time, job cost, and revenue based on these communications, adding it into a spreadsheet for each job ticket. Missing just one detail—which was a common occurrence—would throw off schedules, costs, and revenue.

Bringing it all together with Sage 300 Service Management.

When Craig's company decided to implement Sage 300 Construction and Real Estate, it was like a light switch came on. The Service Management solution enables him to run a dispatch board on a large monitor for everyone to see. Now Craig can easily track the progress of each job ticket, including hours worked. Plus he can see job tickets five weeks into the future—in just a click—which makes it easy to spot jobs based on service agreements versus service calls as well as spot underbooked and overbooked time.

Dispatcher (continued)

Service Management also solves the communication riddle. A built-in communications system improves the way Craig collaborates with technicians. He can easily start, stop, or suspend job tickets—with real-time visibility for technicians.

Time tracking and payroll simplified.

The Service Management solution not only saves Craig time; it also makes time tracking and payroll much easier for everyone involved.

Whereas technicians use to have to turn in paper-based timecards or email the information to the office, now it's automated. The technician enters time in the system and it's automatically passed to payroll, where Jane can process it.

All in all, it puts the previous bubblegum system to shame.

Tools Used

- Service Management
- Preventive Maintenance and Service Agreements
- Service Purchasing
- Service Inventory
- Service Messaging

Other Resources

Screenshots

- Service Management Dispatch Board

Websites

- Development Partner Solutions

Service Technician

As a service technician, Brian used to feel like he was working on an island. When he got in his truck and headed out to a customer site, he was isolated. Disconnected.

Brian would have to call Craig, the dispatcher, numerous times throughout the day to check in. He'd call to say he was headed to a job, that he was at a job, that he was leaving to get a part, that it was taking longer than expected, that the job was complete, and so on. Even more frustrating, when a work order changed, he would have to drive all the way back to the office to pick up additional parts or materials. It all added up to a huge time waste.

Staying connected in the field.

Today, the Sage 300 Construction and Real Estate Service Management solution keeps Brian connected to the right information and the right people. Gone are the constant back-and-forth phone calls. Brian can notify the dispatcher where he is and when the work has begun at the touch of a button on his smartphone.

Before he meets with a customer, he can pull up the work order and the customer's account history on his laptop or tablet. It's vital for Brian to have a clear understanding not only of today's work but also what was done previously. The last technician may have suspected a different issue. By reading that technician's notes, Brian is prepared to talk with the customer and can avoid repeating the same work as last time.

Automated purchase orders and inventory.

In some cases, Brian may need a part that wasn't provided by the warehouse. Sage 300 enables him to promptly acquire a purchase order number from Ann in accounting—without having to go back to the office.

Service Technician (continued)

After the work is complete, Brian hops back in the truck and checks his smartphone to see if there are any changes in his schedule or new assignments. At the end of the day, he no longer needs to go through the grunt work of performing a truck inventory. When he updated the work orders throughout the day, the truck stock quantity on hand automatically updated, as well. Now the warehouse can get a real-time look at what Brian needs restocked so it's ready to roll the next morning.

It's good to be connected.

Today, the Sage 300 Construction and Real Estate Service Management solution keeps Brian connected to the right information and the right people.

Tools Used

Service Management

Preventive Maintenance and Service Agreements

Service Purchasing

Service Inventory

Service Messaging

Other Resources

Websites

Development Partner Solutions

Real Estate

When you manage a growing portfolio of properties, you need to focus on providing topnotch services to your tenants and attracting new leases. Whether you manage multiple rental types or focus on one type of property, Sage 300 connects you to the information and automated tools you need to manage the leasing process from beginning to end—with built-in capabilities for accounting, budgeting, and building maintenance.

Click to learn how these individuals are addressing their daily business challenges.

Leasing Agent

Property Manager

Leasing Agent

Kim's workday never stops. She lives and works in the property complex she manages, which includes a mix of owner-occupied condominium units, rental units, and retail space.

That means she's the first contact for potential tenants, who are interested in the property. She's also responsible for handling existing tenants, including service requests, lease payments, and overall customer service.

Sage 300 Construction and Real Estate Property Management enables Kim to stay on top of things. In a click, she can see which units are available or will be available in the next 90 days. She can also quickly run a lease expiration report to know which

tenants to contact and negotiate renewal. When a new tenant signs a lease, Kim can flag the unit as a pending move-in and easily gather the information she needs to ensure the space is ready.

Handling payments and late charges is a snap.

Kim's company manages over 300 properties. So instead of tenants mailing their payments directly to her, they send them to a bank lockbox. The Import Payment feature in Property Management saves Kim from having to manually enter the payments every month.

The Late Charge feature is an additional time saver. Previously Kim tracked and handled late fees in a paperbound process. Occasionally she would miscalculate or overlook a fee, resulting in dissatisfied tenants or lost revenue. With Sage 300 Property Management, the process of managing late fees is customizable, flexible, and automated.

Security deposits and service requests. Simplified.

Property Management also enables tighter collaboration with Phyllis, who manages accounts payable. When a tenant moves out, the Property Management solution enables Kim

to send an invoice to Phyllis, so she can refund the tenant's security deposit. In addition, Kim uses the Sage 300 Service Management solution to track her service and maintenance requests. Phyllis can easily bill back the service and maintenance invoices to Kim's tenants by using the Accounts Payable Chargeback feature.

With Sage 300, Kim spends less time on paperwork and more time managing tenants and properties.

Sage 300 Construction and Real Estate Property Management enables Kim to stay on top of things.

Tools Used

- Property Management
- MyAssistant
- Office Connector
- Accounts Payable
- Job Cost
- Information Assistant
- Advanced Retail

Other Resources

Customer Success Stories

- JP Napoli Cos.
- McGrath Development

Property Manager

The calls seem to come at the worst possible moment. Two tenants want to expand into the same vacant space.

Or building maintenance is outside waiting for authorization to replace an air conditioner that just failed— and it's 95 degrees outside. It's Cynthia's job to take care of tenants. She needs to make quick decisive decisions and that requires her to be organized, have a well-planned system, and take advantage of the tools available to her.

Better budgeting.

Cynthia's properties will not enjoy long-term tenant retention and an acceptable return on investment unless they are properly managed. This requires her to prepare detailed budgets for the day-to-day operations of the property—including preventative maintenance, repairs to correct problems, and marketing—as well as a capital expenditures budget for improvements, construction, and remodeling.

With Sage 300 Property Management, she can quickly create a report that details expenses for the last five years. If she prefers, she can easily pull all this data into Excel using Office Connector. This enables her to play around with budgeting numbers before finalizing things. And it's all tied to accounting so she can make sure expenses get accounted for in the most advantageous way for tax purposes, keep an eye on cash flow, and easily submit invoices for payment.

Turning a mountain of paperwork into a molehill.

Cynthia's favorite tool is Sage 300 Construction and Real Estate Document Management. Lease agreements. Purchase agreements. Rules and regulations. Maintenance work orders. Insurance policies. The role of a property manager is document intensive. Meticulous records for accounting and taxes are a must. For reasons of liability, all tenant interactions must be recorded.

Property Manager (continued)

Cynthia used to manage it all using a manual, paperbound system. Sage 300 enabled her to go digital. With a couple mouse clicks or a search, she can pull up a lease agreement, review zoning regulations, or route a record for review and approval. The time she has saved has been immense and now there are less errors and missing files.

Being a property manager is a whole lot more manageable with Sage 300.

With Sage 300 Property Management, she can quickly create a report that details expenses for the last five years.

Tools Used

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We'll do everything we can to make your experience with Sage 300 a positive one.

Sage is the #1 provider of construction and real estate software. Our solutions are job ready: Proven, tested, and trusted in the most demanding environments. In fact, each year, Sage products help manage over 400,000 projects and more than 5.7 million subcontracts. To learn how you can keep projects moving and profits improving, visit SageCRE.com.

Learn more about how Sage 300 Construction and Real Estate connects your business in ways no other solution can.

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