

E-BOOK

# Sage 300 Construction and Real Estate



# *Connecting your business in ways no other solution can.*

Finances, Estimating, Project Management, Services—in the office or in the field—Sage 300 Construction and Real Estate is the time-tested construction ERP solution, focused on superior cost management and business integration—in which no other solution can deliver. By integrating your business at all levels and solving the construction and real estate-specific challenges your company faces, Sage 300 Construction and Real Estate emboldens you to achieve your financial goals.

At every stage, from planning and bids, execution and project tracking, invoicing and payments, information is easier to access. People collaborate more effectively. Projects progress predictably. Data accuracy is trusted. Business visibility is accessible with the needed details across the business.

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 confidence, precision, and efficiency 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. Internal and external teams can access powerful reporting tools to make timely and critical decisions throughout each project's lifecycle. With GAAP-compliant methods and clear business visibility, Sage 300 Construction and Real Estate is both the last line of defense in avoiding unnecessary risks and the driving force in improving your company's financial health.

Click to learn how these individuals address their daily business challenges:



**Company Owner**



**Chief Financial Officer**



**Accounting Manager**





# Company Owner

Phillip needs to stay on top of each new challenge in order to keep his company profitable.

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As the owner, Philip keeps a birds-eye view on the company's financial and operational performance. There's always some new challenge demanding his attention. But some things stay the same: construction margins continue to be tight, so it's paramount the field keeps to schedule. Materials costs continue to rise and must be closely monitored. Now with a shortage of workers in recent years, Phillip's company works hard to hire new talent and keep their best performing employees motivated and happy.

## **Sage 300 Construction and Real Estate is mission control.**

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 Construction and Real Estate.

Phillip used to have to meet with staff, send numerous emails, or request reports to get the information he needed. Today, through the Sage 300 Construction and Real Estate executive dashboard Philip accesses a centralized desktop view that presents him with all of the critical business indicators 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 Construction and Real Estate 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, especially with the increased complexity of managing sub-contractors. Plus through his Sage 300 Construction and Real Estate dashboard, Phillip can get updates on current projects over his morning cup of coffee. [Report Designer](#), [Inquiry Designer](#), and [Office Connector](#) are tools that allow project managers, operations managers, and his other staff to format reports and present information in ways that are most meaningful to Phillip. Plus, the team can easily create and track statements that meet the specifications for any risk management task or compliance issue when working with lenders, bonding agents or subcontractors.

Sage 300 Construction and Real Estate keeps Phillip "in the know" with a customizable and proactive email alert system called [MyAssistant](#). And when used along with [MyCommunicator for Outlook](#), Philip can analyze the situation and act decisively without ever leaving his email inbox.

## Company Owner (continued)

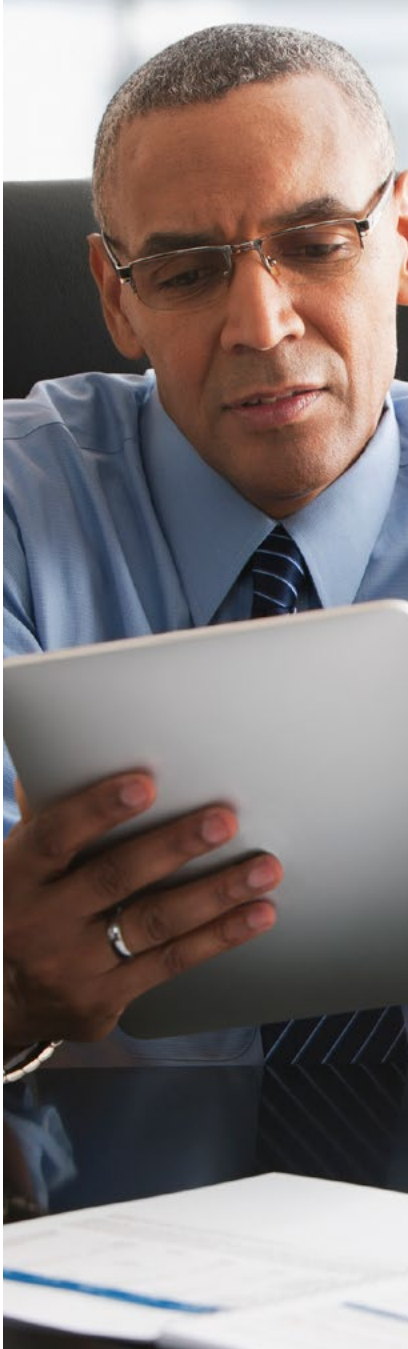
For example, an email could be triggered whenever an active project drops below a 3% profit threshold—notifying Phillip and giving him ample time to take action and make the appropriate inquiries with his staff.

Three years ago, Phillip's company had a clerical and accounting staff of 12. Since implementing Sage 300 Construction and Real Estate, the company's volume has increased, but now it can 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 Construction and Real Estate.**







# Chief Financial Officer

Randy 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.

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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 Randy 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 Construction and Real Estate, Randy has gone from mired in the details to focused on the future.

Each day starts with a review of the [Sage Desktop](#), a customizable dashboard showing Randy his key performance indicators such as liquidity and cash flow. Plus, he can instantly see reports such as AR and AP aging, job profit and job billing summaries. If Randy needs more details, he drills down into an area such as billing to determine what's been billed, what's been paid, and what the total receivables are.

[MyAssistant](#) also keeps Randy informed by automatically sending him an email alert when certain conditions are met. For example, if working capital drops below a certain amount, or when the receivables balance crosses the 90-day overdue mark, Randy now has the information at hand to make well-informed decisions and course corrections as necessary. In fact, when using Sage MyAssistant with [MyCommunicator for Outlook](#), Randy can take appropriate action without ever leaving his email system.

## **Fast access to reports, financial statements, and forecasts**

Another key responsibility for Randy 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 Randy 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.

## Chief Financial Officer (continued)

With Sage 300 Construction and Real Estate, Randy 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 Construction and Real Estate works hand in hand with productivity tools like [SAP® 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 Construction and Real Estate helps make the company's past, present, and future a whole lot more secure.**





# Accounting Manager

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

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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, it was 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 heard about Sage 300 Construction and Real Estate and started to see how much simpler things could be with a construction-specific solution—integrating accounting with project management, estimating, job costing, change orders, billing and more.

## **An end to chaos**

Since implementing Sage 300 Construction and Real Estate, the accounting team is able to manage cash flow more strategically—invoicing more quickly, reducing the number of overdue invoices, and as an added benefit of paying vendors on time—taking advantage of vendor discounts. Plus, the reports she's able to generate give her boss and other managers the details they need to make well-informed, timely decisions.

Her team now uses one centralized system to manage subcontractor compliance such as tracking lien waivers, proof of insurance, and certified payroll reports. Her team also benefits from being able to view reports through a personalized dashboard, viewing information such as AP Open Invoice Detail, and AR Aging.

## **No longer a paper pusher**

The office used to have to deal with an onslaught of paper files and documents. Now things are practically paper-free thanks to Sage Paperless Construction. Electronic files make it easy to route documents and get approval, which means Joanne's team is no longer feeling like a bottleneck for projects.



## Accounting Manager (continued)

In addition, accounts payable processes are now flowing smoothly with manual entry eliminated and approvals easy to request and track.

### **Benefits from Sage support**

Joanne's staff has access and relies on Sage Business Care, and they offer her staff construction-specific accounting expertise. Joanne has learned to deeply value the assistance from these seasoned, knowledgeable Sage staff, especially during accounting deadlines.

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

**Sage 300 Construction and Real Estate provides the power to do more.**

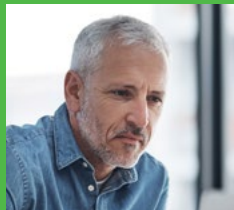




# Projects/Operations

Sage 300 Construction and Real Estate 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 address their daily business challenges:



Senior Estimator



Project Manager



Operations Manager



Superintendent





# Senior 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 Pete had “perfected” the spreadsheet that he used to use for estimates. It worked okay, but more times than he 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—the most widely used cost estimating solution in the industry.

Pete is able to generate more estimates faster than ever before—and 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 a shovel breaks ground 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.

## Rich add-on capabilities

Once he started using Sage Estimating, he started to integrate other features through the Sage partner network: integrated BIM, project history, benchmarking, and electronic takeoff enhancements. This added functionality gave him even more of a competitive edge.

## The power of connectivity

When the company rolled out Sage Estimating, it also introduced Sage 300 Construction and Real Estate. The solutions work well together, which mean that the projects, from customer RFIs to invoices, are streamlined and well managed. Now through the Sage Construction Project Center, Pete and his fellow estimators are able to easily share all of the details on a bid with Mike and his project team.

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

**It’s better estimating by every measure.**





# Project Manager

**Mike's role is easily summed up: Complete projects on time and on budget.**

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It sounds simple enough, but there are tasks to juggle to keep projects moving forward 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 struggled to keep everything organized and under control. His days were pressure filled. He rarely had access to relevant and current information on his projects, which often led to work stoppages or forced him to act on gut instinct.

## **More visibility means less downtime**

Implementing Sage 300 Construction and Real Estate enabled Mike to reinvent himself. Before he was known as a “problem solver,” and now he's called a “problem preventer.” Instead of reacting to issues, he accesses the [Sage Construction Project Center](#) to make adjustments and course corrections proactively. Now he and his team members can access a centralized repository of project-related documents such as, photos, files, approvals, costs, and more from a mobile device. His team securely collaborates on the immediate decisions that are needed to keep each job moving forward, in real time, throughout all phases.

Mike is especially relieved to have a tool that removes assumptions and guesswork out of every decision, mitigating the risk of litigation and noncompliance.

If Mike wants to see which cost codes are at risk of going over budget, when a subcontractor has an expiring insurance certificate, or other issues, he can set automatic email alerts through [MyAssistant](#) to let him know about any of these concerns before they become a problem.

## **Change orders run smoother with Sage 300 Construction and Real Estate**

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 Construction and Real Estate Project Management](#) module, Mike can quickly convert an RFI into a change request and send the proposed change to Phillip, the owner of the building, for approval. 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 free to do what he enjoys most and what got him started in this business—building things!**



# 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 the company's 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 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 Construction and Real Estate, 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 can act on these email alerts without ever leaving Outlook. And he stays connected whether he's in the office, at a client meeting, or on a jobsite through whatever device he's carrying.

## 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 that slip through the cracks and bottlenecks would slow projects down.

Now all those details are managed through remote access at the job site, with a view into their 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.

Plus the Sage 300 Construction and Real Estate [Job Cost](#) module helps Jake ensure his projects are staying within budget. And [Project Management](#) along with [Sage Paperless Construction](#) enables him to smoothly track RFIs, 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.

## *Operations Manager (continued)*

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

**The buck stops with Jake because Jake starts his day with Sage 300 Construction and Real Estate.**







# Superintendent

By the time Sam has finished his first cup of coffee, he typically has 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, and dig through project binders. But since the company implemented Sage 300 Construction and Real Estate and [Sage Paperless Construction](#), 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 that reported hours are processed accurately and on time. Now with [Sage Paperless Construction](#), timecards are easily collected from the field. Next, Sam and the team are notified through [MyAssistant](#) to quickly review and approve, and then it's sent to payroll for processing. The review process is now a snap!

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

Another key advantage with Sage 300 Construction and Real Estate 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 unnecessary rework.

## **Field Reports Made Easier**

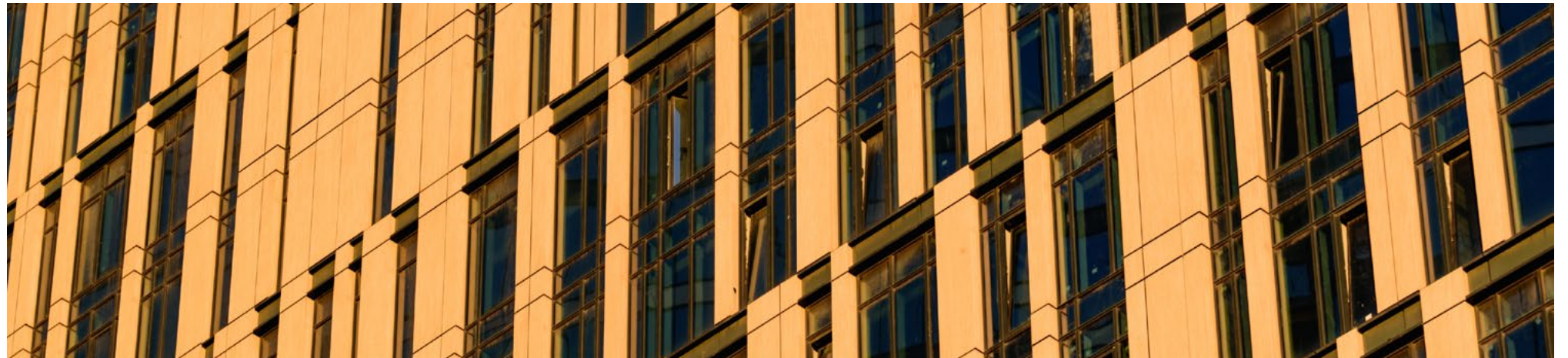
Often when Sam is already under the pressure with things like weather delays or a worker incident, it used to be frustrating to write his Daily Field Report at the end of the day. Now with [Sage Field Operations](#), he creates his report quickly and simply, using his iPad or a Laptop right at the site, with everything he needs to submit a comprehensive report.

## Superintendent (continued)

### **Working better, together**

What's more, it's not only Sam's direct employees who are seeing the benefits of Sage 300 Construction and Real Estate paired with [Sage Construction Project Center](#). 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.





## 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 Construction and Real Estate 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.

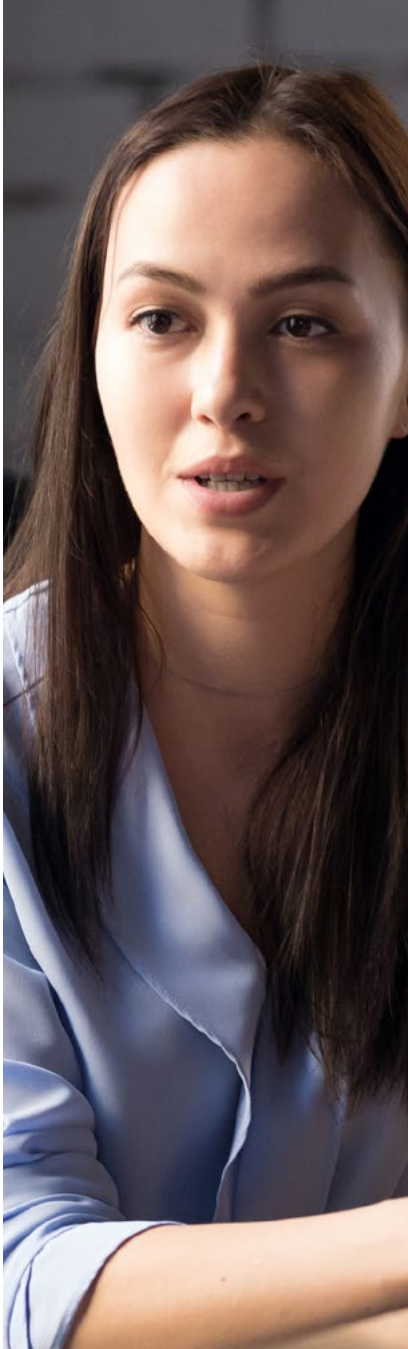
[Click to learn how this individual addresses their daily business challenges:](#)



**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.

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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, payroll certified reports, overtime, and time approval. The Sage 300 Construction and Real Estate [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 timecards are processed through [Sage Paperless Construction](#), 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 all the necessary 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 Construction and Real Estate saves Jane on completing paperwork.

The time savings don't stop there. Sage 300 Construction and Real Estate also offers integration to the [Aatrix eFiling Service](#) which populates the form automatically and reduces administrative overhead even further. The company provides simple access and electronic filing services for [all the necessary state and federal forms](#).

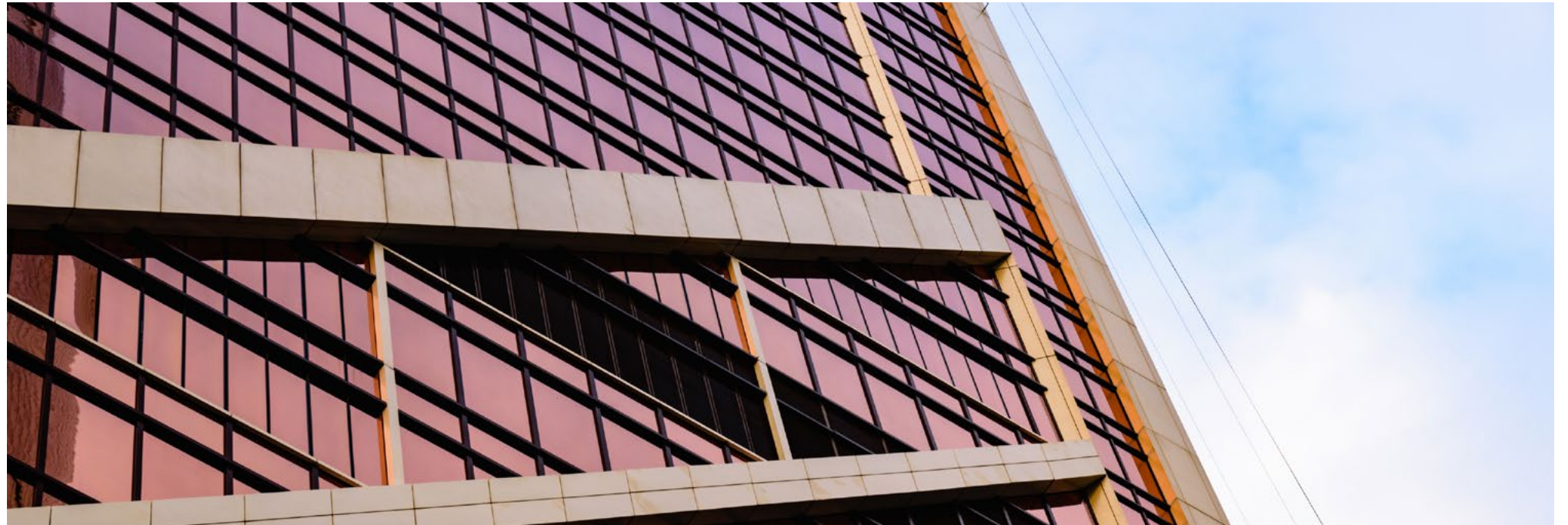
## Subcontractor management simplified

As an Office Manager, Jane is responsible for accounts payable check runs. The software 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.

## *Payroll and Office Manager (continued)*

Now that her company is handling processes without paper, through [Sage Paperless Construction](#) she regularly references important company files 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 Construction and Real Estate has made it easier for Jane to do her job.**







# Service

Contractors who provide field service are faced with higher customer expectations for a streamlined and well-run customer service experience—from scheduling the appointment to the completion of the work. Sage 300 Construction and Real Estate is the competitive edge you need to build upon your reputation for service excellence. It's also built to maximize profit by emboldening you to schedule appointments more simply, reduce inventory costs, and collaborate more effectively between the office and field technicians.

Click to learn how these individuals address their daily business challenges:



Service Manager



Dispatcher



Service Technician







# Service Manager

Cory and his team used keep vital information on sticky notes, emails, notepads, whiteboards, and spreadsheets. Now it's in one place.

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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 Service Operations](#), Cory has successfully ditched the sticky note system. Schedules, job tickets, work orders, and contracts are all saved and seen through. 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 Construction and Real Estate dispatch board. With this visual, Cory can get the lay of the land—monitoring the progress of worksites from start to completion. Cory's team can easily assign the right technicians—with the right skills—to the right calls, as well as ensure their workload is efficiently balanced between service calls and regularly scheduled maintenance.

Cory also appreciates his dynamic service dashboard where he can access real-time information such as work orders, quotes, purchase orders, and field assignments, anytime, anywhere.

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

## **Communications flow between the office and field**

Knowing that technicians can check accurate work order details, see up-to-date schedules, generate quotes, and report on each work order status has given Cory confidence that his team is equipped to provide outstanding customer service every day.

As work is completed, through [Sage Service Operations](#), 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 reenter information.

## **Inventory and parts handled**

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

## Service Manager (continued)

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

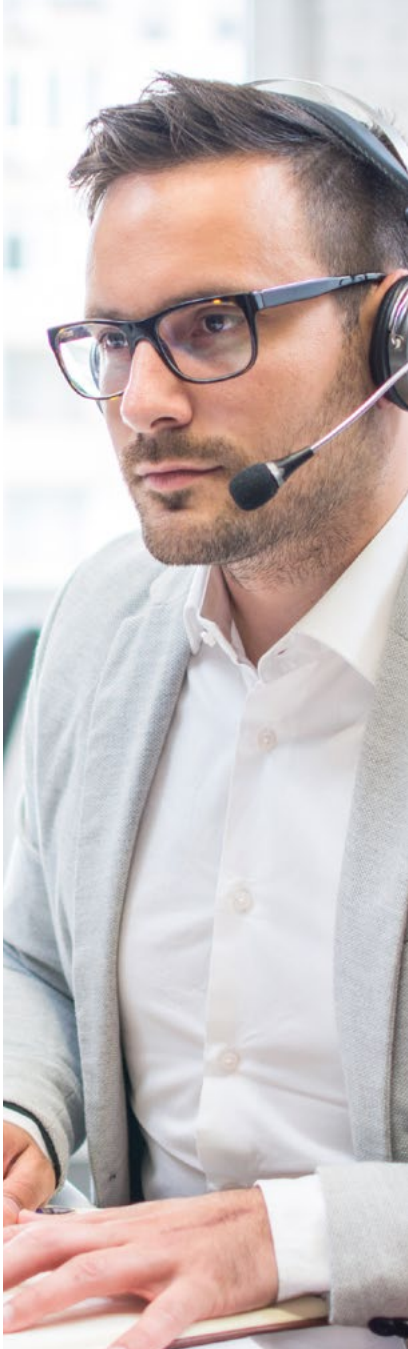
Today, with the Sage 300 Construction and Real Estate [Service Inventory](#) solution, Cory has set up parts to be automatically reordered when quantities reach certain levels of depletion. Also, parts that appear on work orders flow into Service Inventory, triggering an order when a predetermined quantity is reached. Invoices are, in turn, automatically posted to Accounts Payable.

### **Cory runs a tight ship**

Today, Cory has better visibility into all aspects of his department. He understands which jobs are driving the best revenues and profits, and which technicians are his best performers. The department is now achieving higher levels of customer satisfaction ratings and producing stronger cash flow.

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





# Dispatcher

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

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The process he used for tracking everything included a bulletin board, 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 Construction and Real Estate 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. 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. Plus, he can see job tickets days or weeks into the future, which makes it easy to spot jobs based on service agreements versus service calls as well as spot underbooked and overbooked time.

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.



## *Dispatcher (continued)*

### **Changes easy to update**

Technicians in the field often experience some surprise. Now they access real-time information from their mobile device and can communicate changes or requests—so scheduling runs that much more smoothly.

### **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 used 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 patchwork of systems to shame.**





# 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.

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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 all from 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 that day'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 Construction and Real Estate enables him to promptly acquire a purchase order number from Ann in accounting—without having to go back to the office.

After the work is complete, Brian hops back in the truck and checks his device 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.

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

**It's good to be connected.**



## Real Estate

When you manage a growing portfolio of properties, you need to focus on providing top-notch services to your tenants and attracting new leases. Whether you manage multiple rental types or focus on one type of property, Sage 300 Construction and Real Estate 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 address 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.

Kim is 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. Through Sage Mobile Dashboards, she can view reports from anywhere using either her phone or laptop.

## Handling payments and late charges is a snap

Kim's company manages over 50 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 Construction and Real Estate 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 Construction and Real Estate [Service Management](#) solution to track her service and maintenance requests.

## *Leasing Agent (continued)*

Phyllis can easily bill back the service and maintenance invoices to Kim's tenants by using the Accounts Payable chargeback feature.

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

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





# Property Manager

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

Building maintenance is 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 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 or an acceptable return on investment unless she stays on top of the many variables impacting the property, making quick course corrections. This requires her to prepare detailed budgets for the day-to-day operations of the property—including preventative maintenance, repairs, and marketing—as well as a capital expenditures, budgeting for improvements, construction, and remodeling.

With Sage 300 Construction and Real Estate 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 Paperless Construction](#) for 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.

Cynthia used to manage it all with a manual, paperbound system. Sage 300 Construction and Real Estate enabled her to go digital. She can easily 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 fewer errors and missing files.



## *Property Manager (continued)*

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

**Being a property manager is a whole lot more manageable with Sage 300 Construction and Real Estate.**





## We'll do everything we can to make your experience with Sage 300 Construction and Real Estate a positive one.

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