Sage 300
Construction and Real Estate

Gain deeper insight into your business with Sage 300 Construction and Real Estate

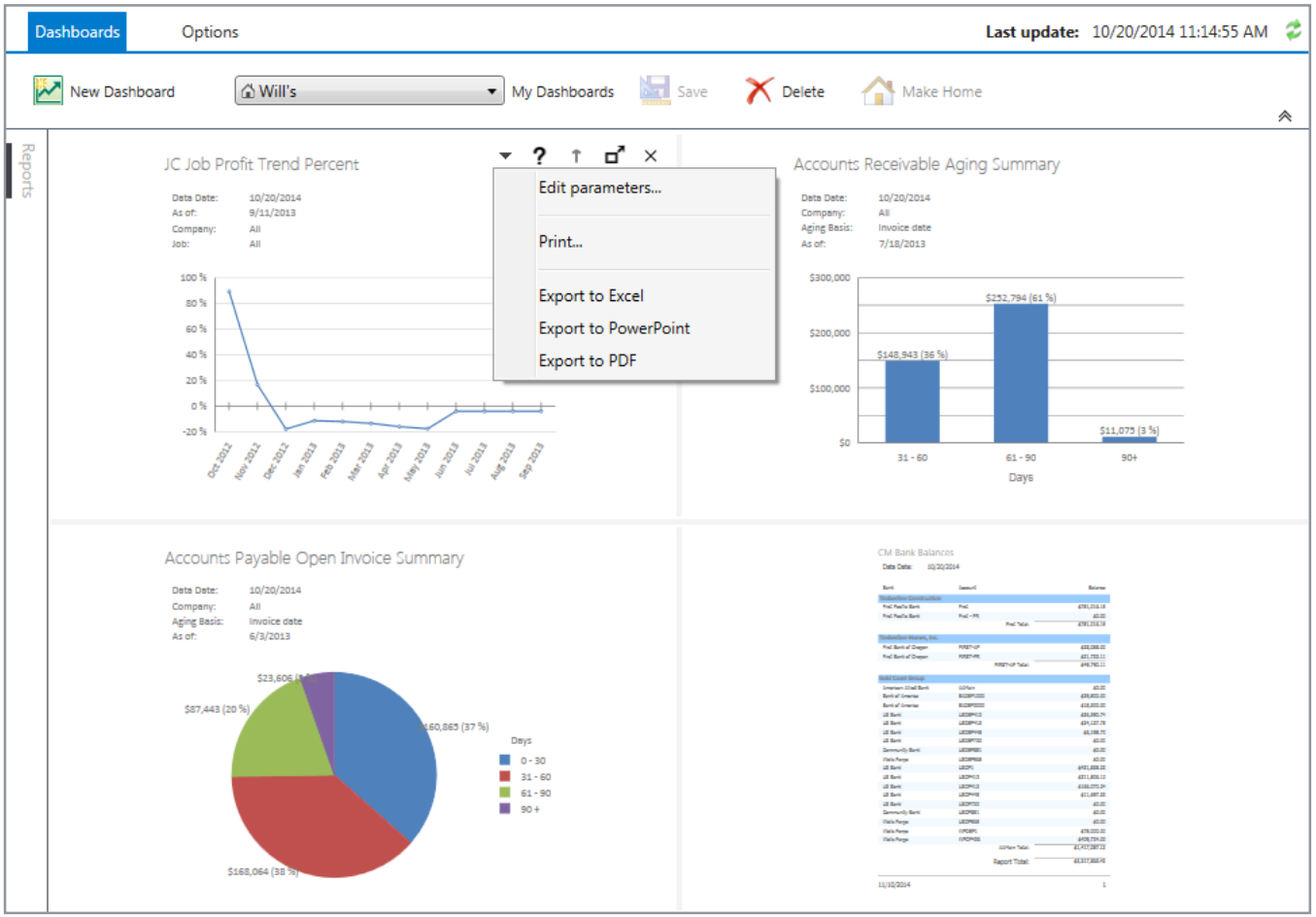
Your employees face issues that impact your company's profitability on a daily basis. These issues include controlling project schedules and budgets, managing labor, and minimizing risk. In order to make the best decisions for your business, they need access to meaningful information in your project accounting system. How can you provide them with real decision-making data?

Sage 300 Construction and Real Estate provides you with the insight you need—when it's needed most. You get quick access to critical data and the ability to make informed decisions to keep projects moving and profits improving. This book explores some of the many ways Sage 300 Construction can help you gain deeper insight into your business.

See your business at a glance

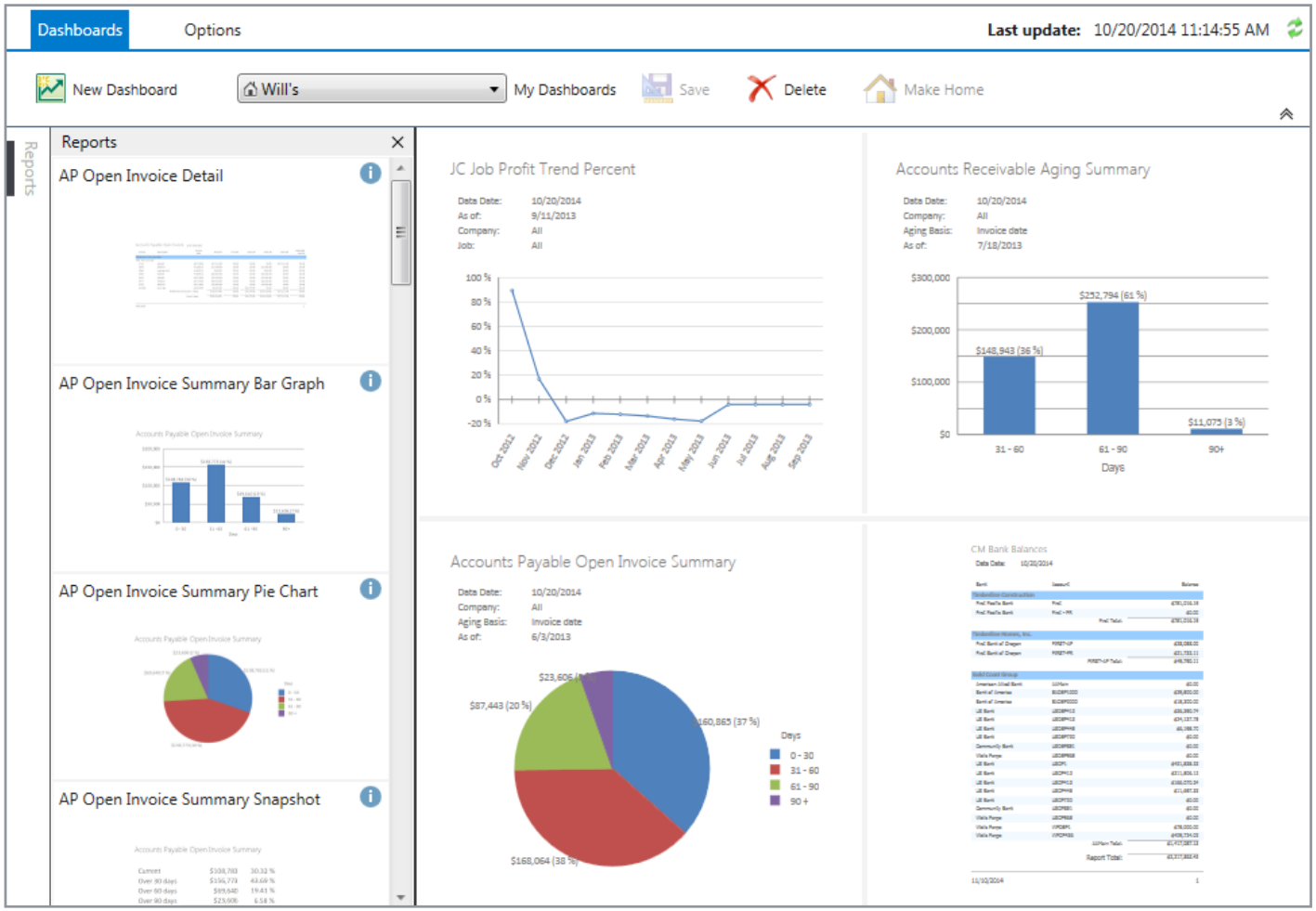
The Executive Dashboard provides immediate access to the critical information you need to make informed decisions. With intuitive graphical reports, you can easily monitor trends such as project profitability, property occupancy, or cash flow and identify potential issues before they arise.

Use the Sage 300 Construction and Real Estate Executive Dashboard to drive the decision-making process and deliver the right information to the right people at the right time.



- Export dashboard information to PDF or Excel so you can share across departments.
- Leverage prebuilt dashboard views including cash snapshot, company overview, job profit, and property overview.
- Export to Powerpoint so you can bring key performance indicator information to life and effectively communicate what's going on in the business.
- See trends at a glance across projects and dates.

Executive Dashboard

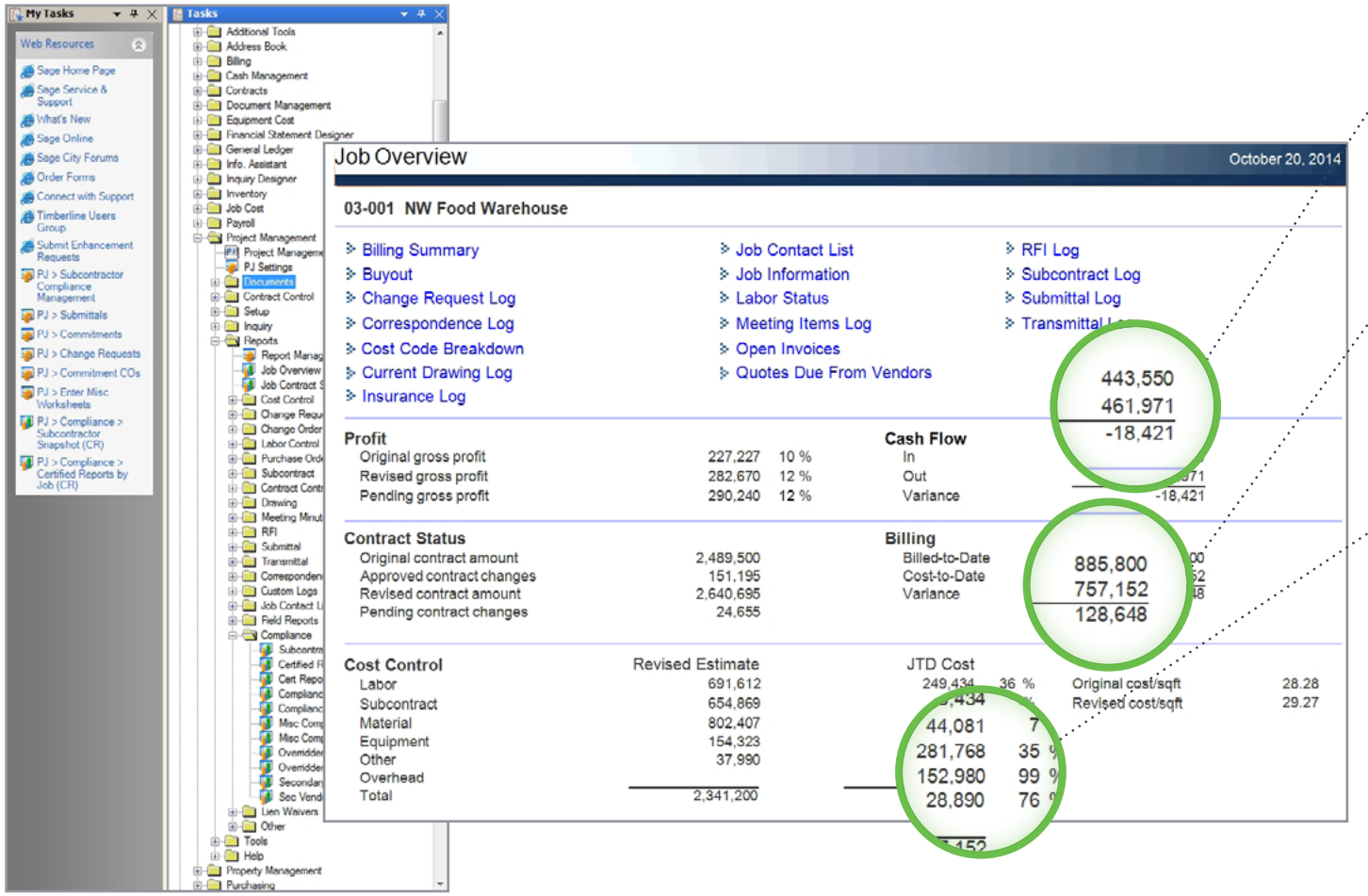


- Secure company information by setting up data views by organizational role.
- Customize your dashboard so you only see the information you need.
- View data across multiple companies when applicable.
- Use Executive Dashboard standalone or in conjunction with Sage 300 Construction and Real Estate.

Get clear, effective reports on the health of your business

Sage 300 Construction and Real Estate offers more than 1,400 prebuilt report formats plus the ability to create your own custom reports. Here are some of the essential reports you will need to run your business efficiently and effectively.

Keep your fingers on the pulse of profitability, cash flow, and billing for your jobs directly from the Sage 300 Construction and Real Estate Desktop.



- Cash flow is negative—take immediate steps to improve.
- The actual cost per square foot is higher than the original estimate—make a note to increase future estimates.
- This project has used 99% of estimated equipment costs—is a change order needed?

Get a concise summary of change requests for any job from the Project Management module. The Change Request Log with Detail report provides an overview of where individual change requests stand, enabling proactive change management. Use the report to view details for each change request, as well as the overall contractual and profitability status of a job.

Change Request Log with Detail

Timberline Construction — Date: 8/25/2014

03-002 Clackamas Office Park #4

Number	Date	Description	Schedule Impact	Source	Reason	Amount	Status	Approved Date	Change Order
1	5/11/13	Change circuit on fixtures in vestibule	0.5 day	RFI BE-01	Sub Request	467.50	Submitted		
2	5/14/13	Additional Sidewalks	2 days	ASI EGA-01	Change in Scope	1,045.00	Submitted		
3	5/15/13	Additional sills @ main entrance.		Bulletin EGA-02	Change in Scope	18,018.00	Submitted		
4	5/22/13	Extended use of temporary power		Other 1	Change in Scope	2,906.20	Approved	5/22/13	1
5	5/14/13	Removal of trees not included on C-2 drawings	4 days	RFI 7	Change in Scope	11,235.40 **	Approved	5/17/13	3
6	5/18/13	Change hardware in main conference room		Other EGA-WT-02	Owner Addition	537.90	Potential		
7	5/28/13	Site electrical conduit		Other EGA-WT-003	Change in Scope	5,421.90 **	Approved	5/28/13	3
8	5/29/13	Addition of 31 isolation valves		Other EGA-WT-004	Engineering Omission	1,083.60 **	Approved	5/28/13	3
9	5/21/13	Painting of exposed sprinkler pipe.		None	Engineering Omission	1,375.00	Approved		2
10	5/28/13	Upgrade networking system		None	Change in Scope	6,600.00	Approved	5/27/13	4
11	5/28/13	Incorrect Mix of Concrete		CCD	Change in Scope	3,850.00	Approved	5/28/13	5
13	5/29/13	Add bicycle enclosure off back entrance way		Addendum	Change in Scope	1,485.00	Approved	5/29/13	6
14	4/8/13			Other	Change in Scope	0.00	Potential		

Original Contract Amount:	831,930.00
Approved Contract Changes:	33,957.00
Revised Contract Amount:	865,887.00
Pending Contract Changes:	20,068.40

** Approved price amounts have not yet updated the accounting approved and revised contract amounts, but are included in the approved and revised contract amounts in the Contract Summary.

- Choose the report that best fits your company's needs from a selection of 1,400 prebuilt templates.
- See how project scope changes impact the schedule.
- Get updates on change order status.
- Understand the impact of contract changes on costs and profits.

Keep tabs on your subcontracts for any job from Project Management by using the Subcontract Log with Detail report. See a complete breakdown by cost code to see real-time progress of your committed cost.

Subcontract Log with Detail

Timberline Construction 08/25/2014 Page 1

03-001 NW Food Warehouse Project Manager: Pat Siravo

Subcontract	Description-Sub-Status	Cost Code	Cat	Original Amount	Pending Amount	Approved Amount	Revised Amount	Invoiced Amount	Retained Amount	Paid Amount
01001-01 Plumbing - Kingston Plumbing Committed										
1	Plumbing	15-400	S	88,015.44		2,500.00-	85,515.44	22,001.50	2,200.15	12,421.35
	Plumbing Totals			88,015.44*	.00*	2,500.00-*	85,515.44*	22,001.50*	2,200.15*	12,421.35*
01001-02 Tile Flooring - Dallas Tile & Carpet Committed										
1	Resilient Tile Flooring	9-660	S	134,400.00			134,400.00			
	Tile Flooring Totals			134,400.00*	.00*	.00*	134,400.00*	.00*	.00*	.00*
01001-03 HVAC Systems - Jackson Heating & AC Committed										
1	HVAC	15-500	S	177,065.00		800.00	177,865.00			
	HVAC Systems Totals			177,065.00*	.00*	800.00*	177,865.00*	.00*	.00*	.00*
01001-04 Fire Protection - Sprinkler Contractors Committed										
1	Fire Protection	15-300	S	54,600.00		750.00	55,350.00			
	Fire Protection Totals			54,600.00*	.00*	750.00*	55,350.00*	.00*	.00*	.00*
01001-05 Refrigeration - Barth Electric Committed										
1	Refrigeration	15-650	S	76,360.00			76,360.00			
	Refrigeration Totals			76,360.00*	.00*	.00*	76,360.00*	.00*	.00*	.00*
01001-06 Electrical - A-1 Electric Company On Hold										
1	Electrical Subcontracts	16-100	S	82,500.00		250.00-	82,250.00	8,250.00	825.00	5,197.50
	Electrical Totals			82,500.00*	.00*	250.00-*	82,250.00*	8,250.00*	825.00*	5,197.50*
01001-08 Exterior Signage - Bronson Signs Committed										
1	Exterior Signs	10-430	S	30,000.00			30,000.00			
	Exterior Signage Totals			30,000.00*	.00*	.00*	30,000.00*	.00*	.00*	.00*
01001-09 Painting - Beaverton Painting Committed										
1	Painting - Exterior	9-910	S	4,320.00			4,320.00			
2	Painting - Interior	9-920	S	600.00	215.00		600.00			
	Painting Totals			4,920.00*	215.00*	.00*	4,920.00*	.00*	.00*	.00*
01001-10 Landscaping - Northwest Landscaping Committed										
1	Landscaping	2-900	S	3,250.00		5,600.00	8,850.00	4,500.00	450.00	
	Landscaping Totals			3,250.00*	.00*	5,600.00*	8,850.00*	4,500.00*	450.00*	.00*
03001-06 Upgrade office lighting - A-1 Electric Company Committed										
1	Electrical Sub	16-100	S	5,000.00		60,000.00	65,000.00	5,000.00	500.00	4,500.00
	Upgrade office lighting Totals			5,000.00*	.00*	60,000.00*	65,000.00*	5,000.00*	500.00*	4,500.00*
03001-07 Add'l insulation for cool room - Alpha Insulation Committed										
1	Insulation	7-200	S	3,000.00			3,000.00	3,000.00	300.00	
2	Insulation	7-200	M	1,500.00			1,500.00	1,500.00		
	Add'l insulation for cool room Totals			4,500.00*	.00*	.00*	4,500.00*	4,500.00*	300.00*	.00*

- Keep up to date on progress of committed costs
- Quickly compare up-to-date invoice and payment information against original subcontracts' contracts.
- Avoid surprises! Get a holistic overview of all of your committed costs by type to help manage project progress proactively.

Compare your estimated labor units (how much time it will take to perform a task) to what is actually happening with the required labor production report. Make course corrections to stay on budget.

Cost Code

Est Factor

JTD Factor

Required Factor

Timberline Construc ST Required Labor Pr 10/08/2014 Page 1

Include closed jobs: No

03-001 NW Food Warehouse Project Manager: Pat Siravo

Cost Code	Description	Unit Desc	Est Hours	Est Units to Place	Est Factor	JTD Hours	JTD Units in Place	JTD Factor	Remaining Hours	Remaining Units	Required Factor
	SITEWORK										
2-220	Excavate & Backfill	cuyd	2,766.00	1,525.00	.55	2,697.00	1,350.00	.50	69.00	175.00	2.54
2-510	Asphalt Paving	sqs	315.00	380.00	1.21	341.00	384.00	1.13			4.00
2-520	Cement Paving	yds	77.00	540.00	7.01	84.00	510.00	6.07		30.00	30.00
	CONCRETE										
3-210	Reinforcing Steel	ton	318.00	25.00	.08	296.00	50	.08	22.00	1.50	.07
3-310	Structural Concrete	cuyd	748.00	2,278.00	3.05	642.00		3.27	106.00	178.00	1.68
3-345	Concrete Finishing	sqs	1,448.00	104.44	.07	1,376		.07	72.00	14.44	.20
3-470	Tilt-Up Precast	lnft	877.00	1,200.00	1.37	84		1.24	30.00	150.00	5.00
	METALS										
5-310	Steel Decking	sqft	486.00	80,000.00	164.61				486.00	80,000.00	164.61
	THERMAL & MOISTURE PROTECTION										
7-510	Built-Up Bitumins Rof	sqs	2,390.00	80.00	.03				2,390.		.03
	DOORS & WINDOWS										

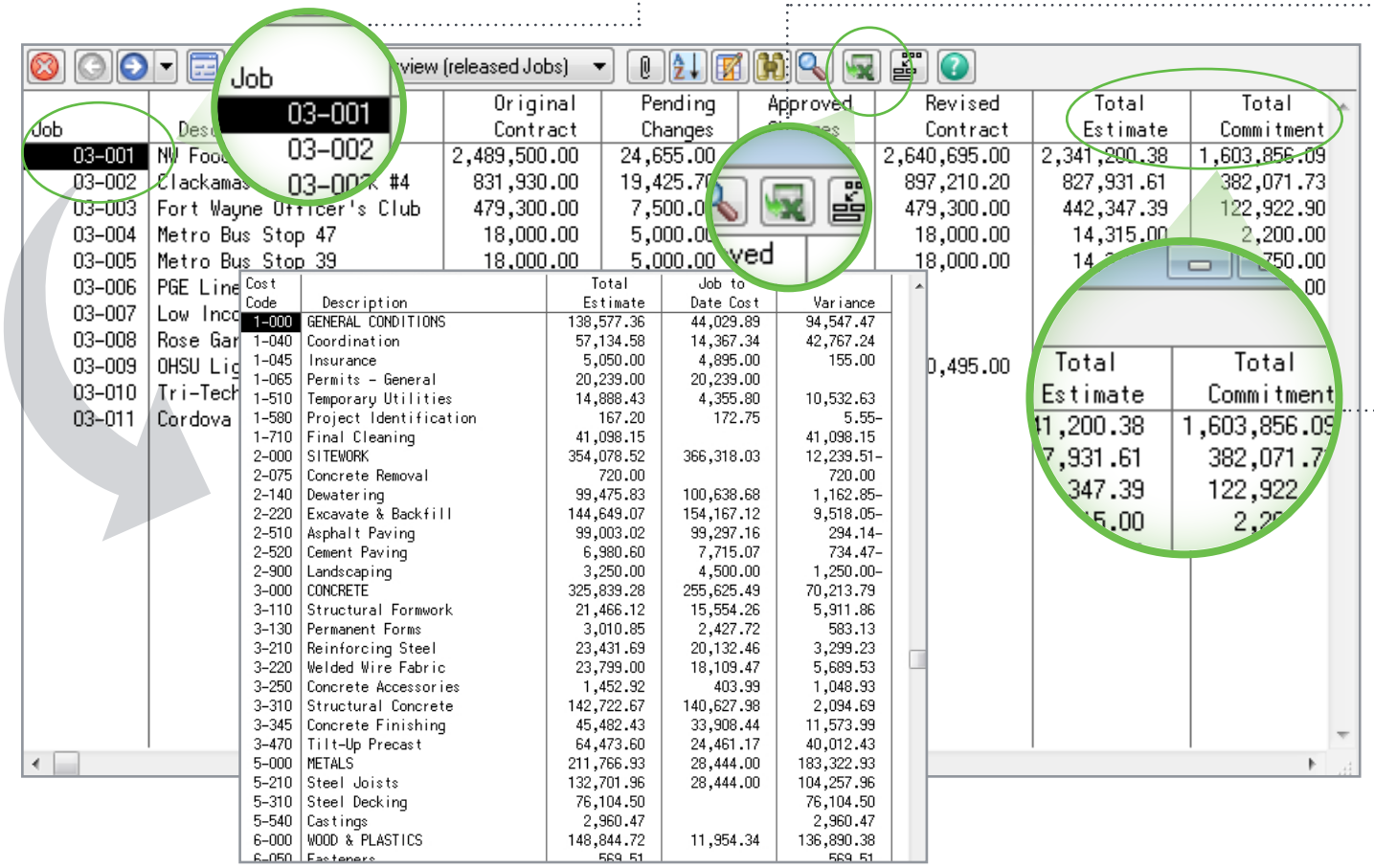
- For each cost code, know the estimated hours, units, and productivity factor and the job-to-date hours, units, and factors.
- See the remaining hours, units, and required productivity factor to meet estimates.
- Spot and correct potentially costly production problems before they develop into overruns.
- Learn the exact productivity required to complete the job within estimates.

Find the information you need

Inquiries give you instant onscreen access to the information you need to make more informed decisions. Use one of the many prebuilt inquiries to quickly search for specific data or create your own customized inquires using the Inquiry Designer.

Job Overview Inquiry

See your projected cost at complete and projected profit for any job. It's easy to search, select, and filter by job code, description, percent complete, and more.



Job Overview Inquiry—Cost Code Detail

- Drill down to the level of detail that you need to see.
- Print or send to Excel directly from Inquiry window.
- Compare original and revised contract amounts against committed costs in easy-to-view columns.
- Adjust your views and save them for future use.

Profit Summary Inquiry

See your projected cost at complete and projected profit for any job. It's easy to search, select, and filter by job code, description, percent complete, and more.

Profit Summary

Job		Revised Contract	Cost At Complete	Projected Profit	% Comp
03-001	NW	2,640,695.00	2,341,200.38	299,494.62	32.00
03-002	Clac ark #4	897,210.20	827,931.61	69,278.59	22.00
03-003	Fort Wa er's Club	479,300.00	442,347.39	36,952.61	34.00
03-004	Metro Bus Stop 47	18,000.00	14,315.00	3,685.00	
03-005	Metro Bus Stop 39	18,000.00	14,315.00	3,685.00	
03-006	PGE Line WO#345		14,589.11	14,589.11-	
03-007	Low Income Housing				
03-008	Rose Garden Arena Rewiring				65.00
03-009	OHSU Ligh				
03-010	Tri-Tech				
03-011	Cordova				
03-012	Tri Tech				
03-014	Downtown				
03-015	Beaverto				

Remaining Estimate

Cost Code	Des	Total Estimate	JTD Cost	Remaining Estimate
1-000	GEN	138,577.36	44,029.89	94,547.47
1-040	Co	57,134.58	14,367.34	42,767.24
1-045	In	5,050.00	4,895.00	55.00
1-065	Pe	20,239.00	20,239.	
1-510	Temp	14,888.43	4,355	3
1-580	Projec cation	167.20	172	
1-710	Final Cleaning	41,098.15		
2-000	SITEWORK	354,078.52	366,318	1-
2-075	Concrete Removal	720.00	367.34	.00
2-140	Dewatering	99,475.83	100,638.68	162.85-
2-220	Excavate & Backfill	144,649.07	154,167.12	9,518.05-
2-510	Asphalt Paving	99,003.02	99,297.16	294.14-
2-520	Cement Paving	6,980.60	7,715.07	734.47-
2-900	Landscaping	3,250.00	4,500.00	1,250.00-
3-000	CONCRETE	325,839.28	255,625.49	70,213.79
3-110	Structural Formwork	21,466.12	15,554.26	5,911.86
3-130	Permanent Forms	3,010.85	2,427.72	583.13
3-210	Reinforcing Steel	23,431.69	20,132.46	3,299.23
3-220	Welded Wire Fabric	23,799.00	18,109.47	5,689.53
3-250	Concrete Accessories	1,452.92	403.99	1,048.93

Profit Summary Inquiry—Cost Code Detail

Monitor job activity with simple navigation from the job to the cost codes and detailed transactions.

- Click on a specific job so you can drill down to detailed estimates and job-to-date information for each cost code.
- Drill down to a particular cost code to get the category detail; click a cost code to show individual transactions.
- Drill down further to view distributions for each transaction.
- Keep tabs on your total costs to date so you can proactively manage your jobs.

Vendor Compliance Inquiry

Compliance Vendor All Items

Vendor	Name	City	State	Telephone	Lien Waivers	Certifd Reports	Vendor Misc.	Job Misc.	General Liability	Auto Insurance
100	A-1 Electric Company	Tigard	OR	(503)744-3200	Click to See	Click to See	Click to See	Click to See	Expired	Expired
101	Alpha Insulation	Forest Grove	OR	(503)821-1176	Click to See	Click to See	Click to See	Click to See	Expired	Expired
102	Acme Door & Glass Distributors	Portland	OR	(503)245-8162	Click to See	Click to See	Click to See	Click to See	Expired	Expired
103	Ace Drywall	Tigard	OR	(503)858-3838	Click to See	Click to See	Click to See	Click to See	Expired	Expired
104	AAA Insurance and Bonding	Portland	OR	(503)242-5859	Click to See	Click to See				N/A
105	Adams Electric			(503)636-3200	Click to See					
200	B & M Marble, Inc.	Portland	OR	(503)242-1500						
201	Becker Roofing Company	Estacada	OR	(503)675-3200						
202	Beaverton Painting	Beaverton	OR	(503)626-8484						
203	Barth Electric	Beaverton	OR	(503)456-3945						
204	Bronson Signs	Oregon City	OR	(503)650-8454						
205	Beaverton Sand & Gravel	Beaverton	OR	(503)656-2481						
206	City of Beaverton	Beaverton	OR	(503)626-2500						
300	Crocker Electric & Welding	Gresham	OR	(503)520-1000						
301	Cook's Lumber	Tigard	OR	(503)565-6513						
302	Commercial Pest Control	Tigard	OR	(503)626-5575	Click to See					
400	Donaldson Acoustics	Portland	OR	(503)242-6500	Click to See	Click to See				N/A
401	Dallas Tile & Carpet	Hubbard	OR	(503)655-5252	Click to See	Click to See	Click to See	Click to See	N/A	Expired
500	Earhart, Garcia, & Associates	Portland	OR	(503)242-6687	Click to See	Click to See	Click to See	Click to See	N/A	N/A
600	Federal Delivery	San Carlos	CA	(415)443-9878	Click to See	Click to See	Click to See	Click to See	N/A	N/A
601	Ford Metals, Inc.	Oregon City	OR	(503)345-3889	Click to See	Click to See	Click to See	Click to See	Not on File	N/A
602	Fullman Flooring	Vancouver	WA	(206)578-9019	Click to See	Click to See	Click to See	Click to See	Expired	N/A
700	George's Excavation	Scappoose	OR	(503)847-6251	Click to See	Click to See	Click to See	Click to See	N/A	N/A
701	Gresham Paint & Supply	Gresham	OR	(503)544-5560	Click to See	Click to See	Click to See	Click to See	N/A	N/A
702	Gales Industrial Products	San Francisco	CA	(415)872-0476	Click to See	Click to See	Click to See	Click to See	Expired	N/A
800	Hanson Plumbing & Irrigation	Portland	OR	(503)244-5552	Click to See	Click to See	Click to See	Click to See	N/A	Expired
801	Hawkin Masonry	West Linn	OR	(503)697-5467	Click to See	Click to See	Click to See	Click to See	N/A	N/A
802	Happy Day Florist	Tigard	OR	(503)644-8599	Click to See	Click to See	Click to See	Click to See	N/A	N/A
1000	Jackson Heating & A/C	Milwaukie	OR	(503)854-6663	Click to See	Click to See	Click to See	Click to See	Expired	N/A
1100	King Temporary Service, Inc.	Portland	OR	(503)242-7810	Click to See	Click to See	Click to See	Click to See	N/A	N/A
1101	Kingsto									
1111	Tufnel									
1200	Larson'									

Lien Waivers	Certifd Reports	Vendor Misc.	Job Misc.
Click to See	Click to See	Click to See	Click to S
Click to See	Click to See	Click to See	Click to
to See	Click to See	Click to See	Click
	Click to See	Click to See	

Lien Waivers All

Source Vendor 100 A-1 Electric Company

Primary Vendor	Name	Vendor Level	Secondary Vendor Name	Secondary Vendor Relationship	Lien Waiver Type	Status
100	A-1 Electric Company	Primary			Conditional Partial	Outstanding
100	A-1 Electric Company	Primary			Unconditionl Partial	Outstanding
100	A-1 Electric Company	Secondary	Sorrento Interiors (NW Portlan	A-1 Electric Compan	Unconditionl Partial	Compliant
100	A-1 Electric Company	Primary			Unconditionl Partial	Compliant
100	A-1 Electric Company	Secondary	Sorrento Interiors (NW Portlan	A-1 Electric Compan	Unconditionl Partial	Outstanding
100	A-1 Electric Company	Primary			Conditional Partial	Outstanding
100	A-1 Electric Company	Primary			Unconditionl Partial	Outstanding
100	A-1 Electric Company	Primary			Conditional Partial	Outstanding
100	A-1 Electric Company	Primary			Pre-lien	Compliant
100	A-1 Electric Company	Primary			Conditional Partial	Outstanding
100	A-1 Electric Company	Secondary	Chu, Kathy (Crocker Electric &	A-1 Electric Compan	Conditional Partial	Outstanding
100	A-1 Electric Company	Primary			Conditional Partial	Outstanding
100	A-1 Electric Company	Primary			Unconditionl Partial	Outstanding
100	A-1 Electric Company	Primary			Conditional Partial	Outstanding

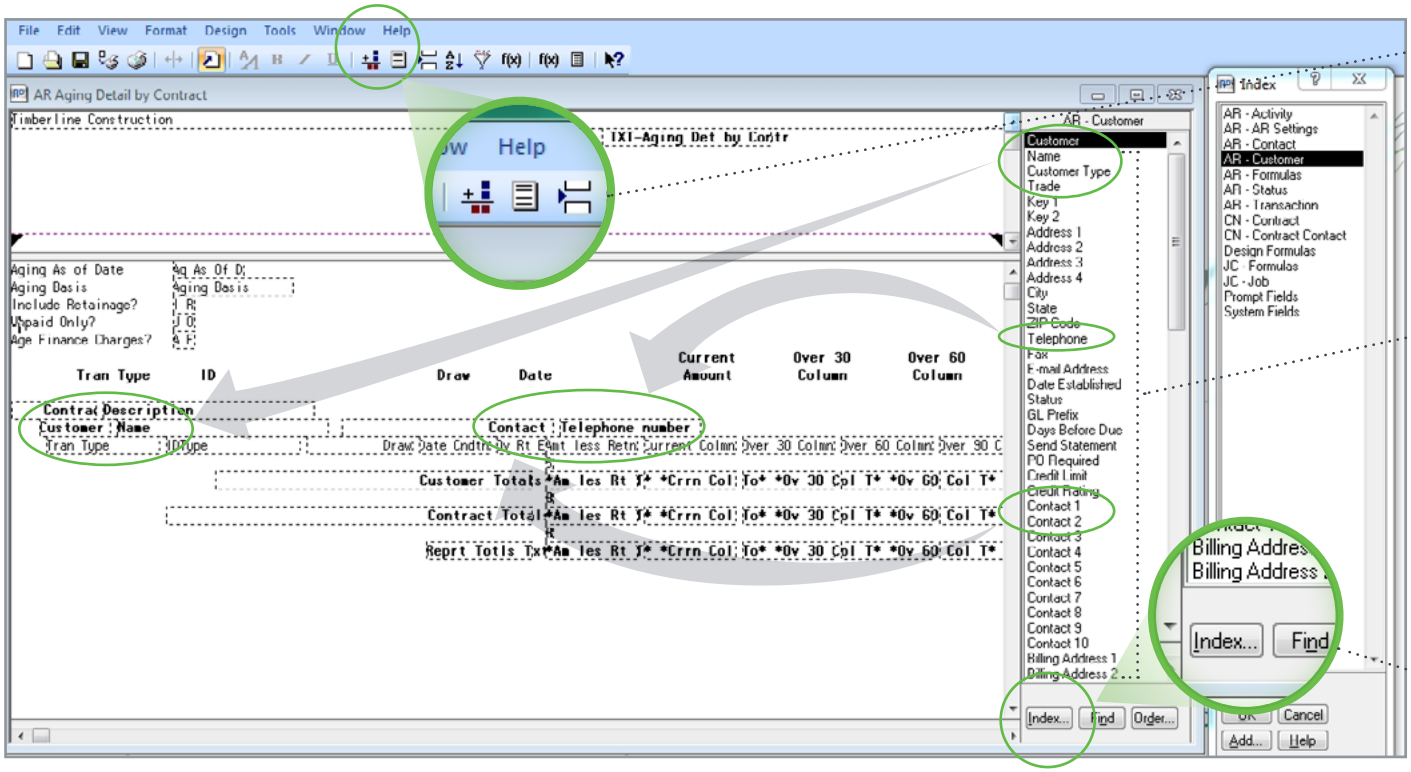
- Minimize your exposure to risk of subcontractor and vendor noncompliance with the powerful Vendor and Job compliance inquiries (available in the Accounts Payable and Project Management modules).

- Drill down to get a quick view of insurance certificates, expected lien waivers, certified reports, and other compliance items across your jobs or for a specific vendor and secondary vendors.

Design the reports you need—using skills you already have

Report Designer

With Sage 300 Construction Report Designer, you can get started right away using prebuilt reports—no changes are needed to get up and running. To meet changing requirements, you can easily modify these prebuilt reports or create your own. Simply point, click, drag, and drop fields to create your own customized reports. Plus, you can give each person in your organization a personalized report menu containing the reports he or she needs for the job.

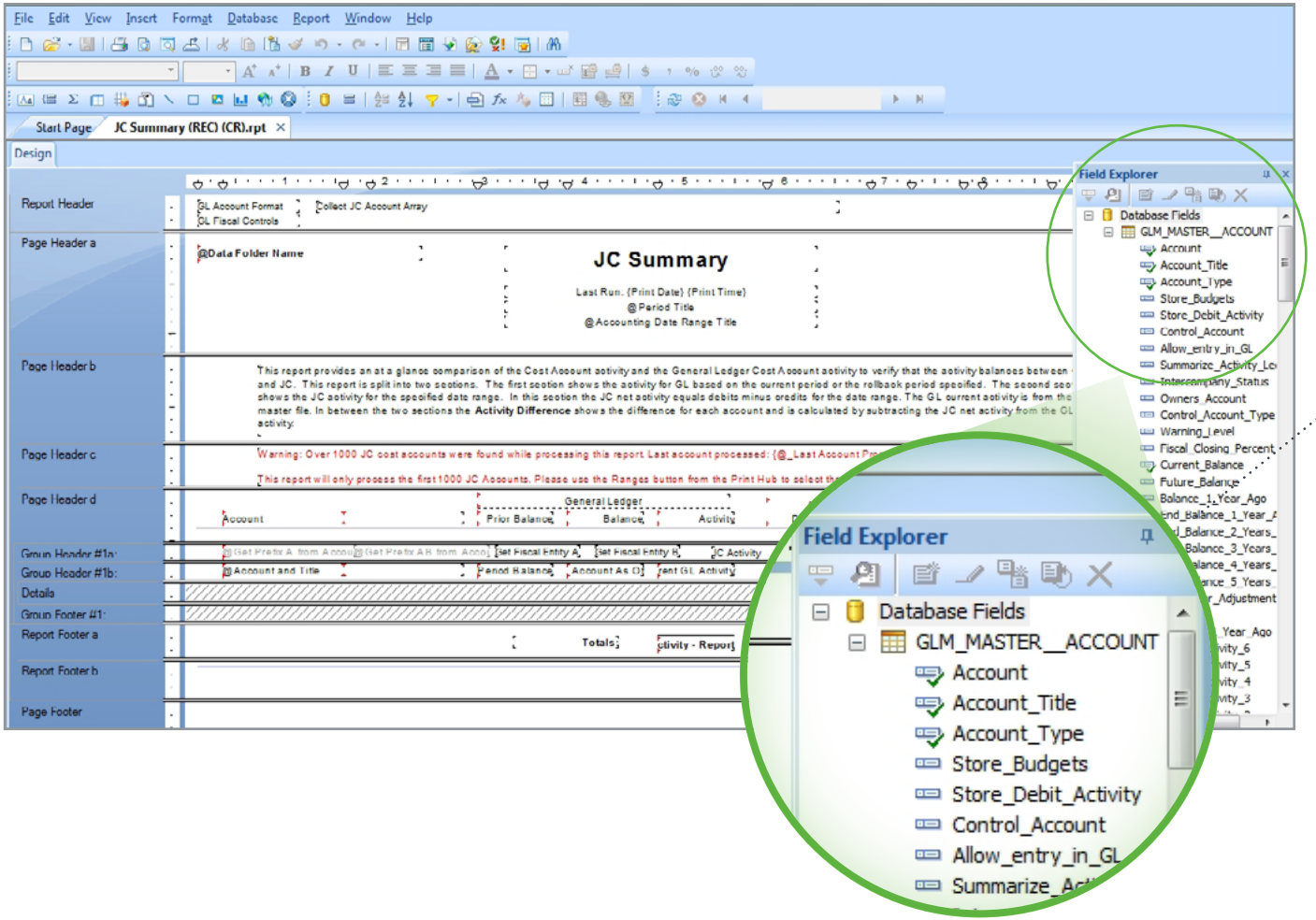


Information can be accessed from multiple data areas including accounts receivable, billing, and job cost.

- Choose from a list of included formulas or create your own.
- Use quick and intuitive drag-and-drop tools to modify or create Sage 300 Construction and Real Estate reports.
- With minimal training and documentation you can take control of your data and get the reports you need the way you want to see them.
- To select additional fields, use the Index button and a list of Sage 300 Construction and Real Estate records used by the report appears onscreen.

SAP® Crystal Reports

If you have in-house SAP Crystal Report design skills, you can use or modify reports to suit your needs.

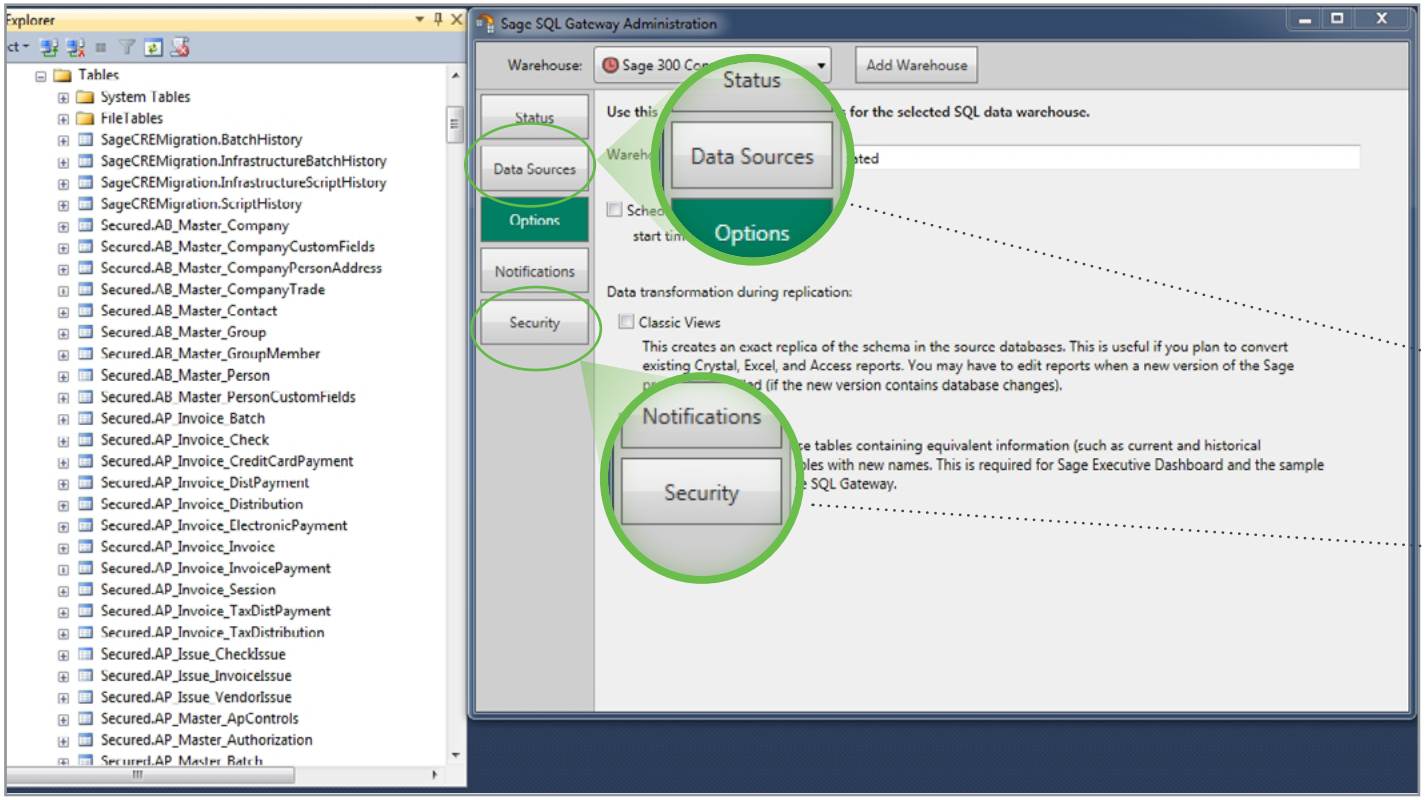


- Use SAP Crystal Reports to create and customize presentation-quality reports from your Sage 300 Construction and Real Estate systems data.

- Get one-click access to Sage 300 Construction and Real Estate data and built-in or customized formulas.

Consolidate organizational data

Consolidate data from multiple company sources using Sage SQL Gateway so you can see a more holistic view of your organization. If you have in-house SQL skills, you can develop reports using SAP Crystal Reports or SQL Server Reporting Services, or you can modify Sage 300 Construction reports to use SQL data when desired.

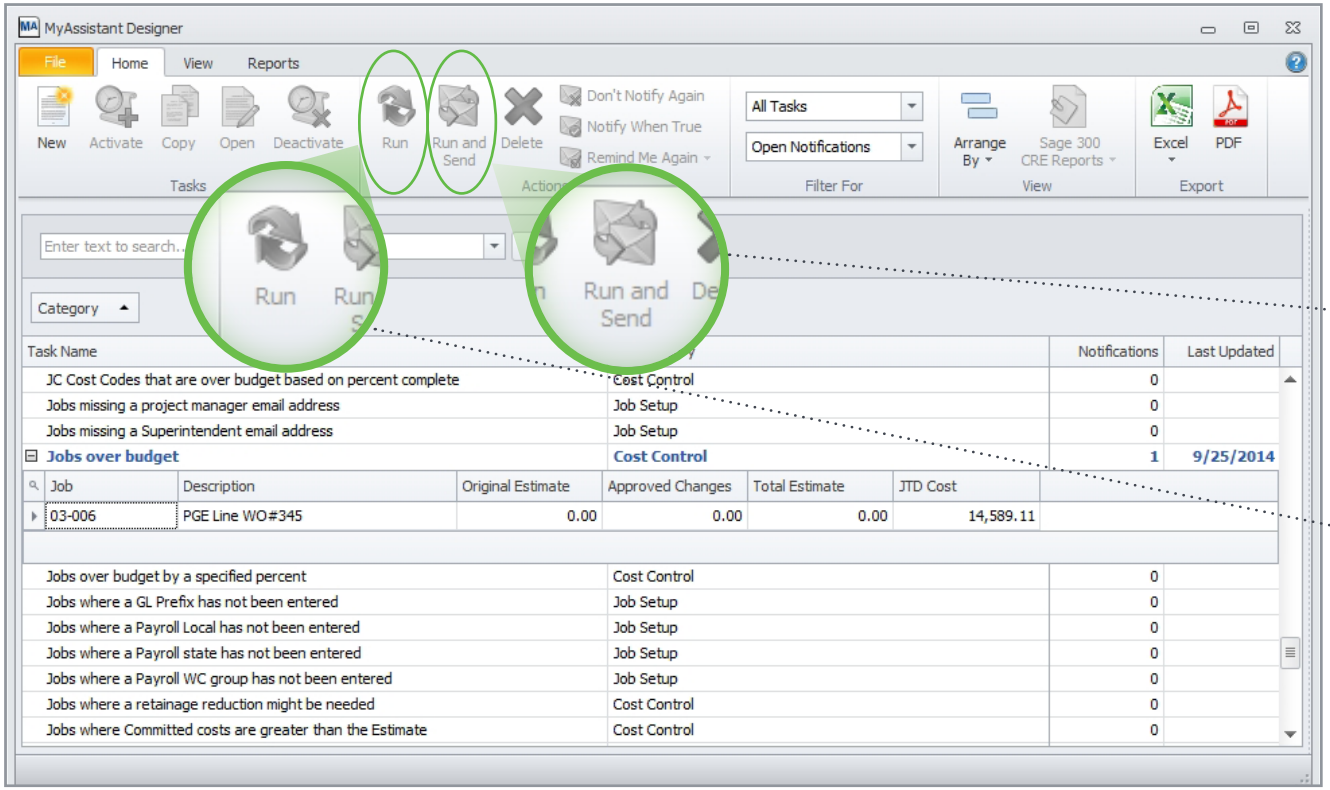


- Copy and maintain your Sage 300 Construction and Real Estate data in a synchronized SQL database by using the Sage SQL Gateway.
- See reports across your entire organization when using multiple companies.
- Secure your data throughout your organization by role.

Proactive alerts

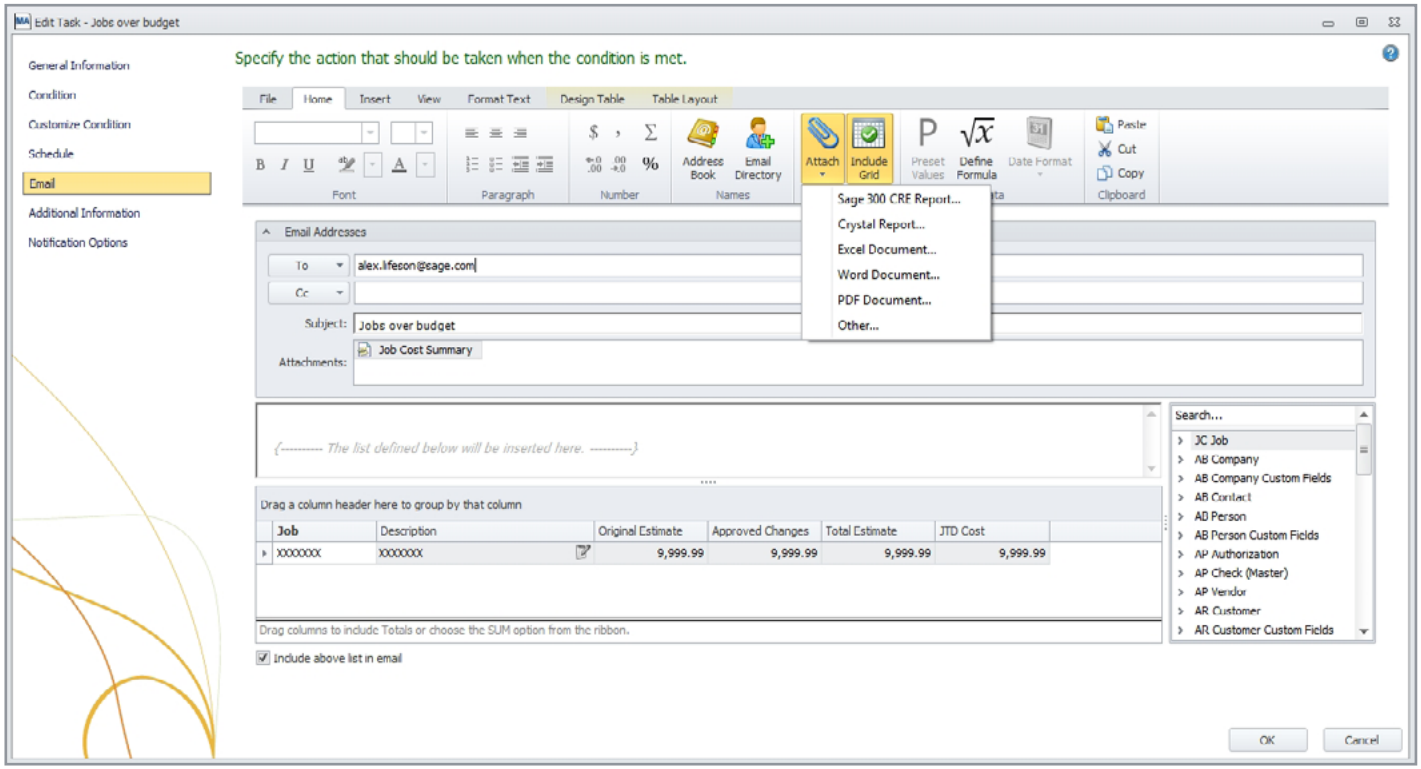
Your employees spend a lot of time entering many details, documents, and data into your business management system. How do you get this information out of the system in a way that automatically informs people what they need to do every day? Sage MyAssistant automatically generates reports, spreadsheets, documents, and email alerts, proactively distributing information to those who need it so they can keep all phases of a project or property on time and on budget.

Create alerts with Sage MyAssistant



- Create tasks to automatically generate and send reports inside and outside of your organization.
- Attach reports from Sage 300 Construction and Real Estate or SAP Crystal Reports and specify the information that should be included.
- Drag and drop data fields to include in the body of the email.

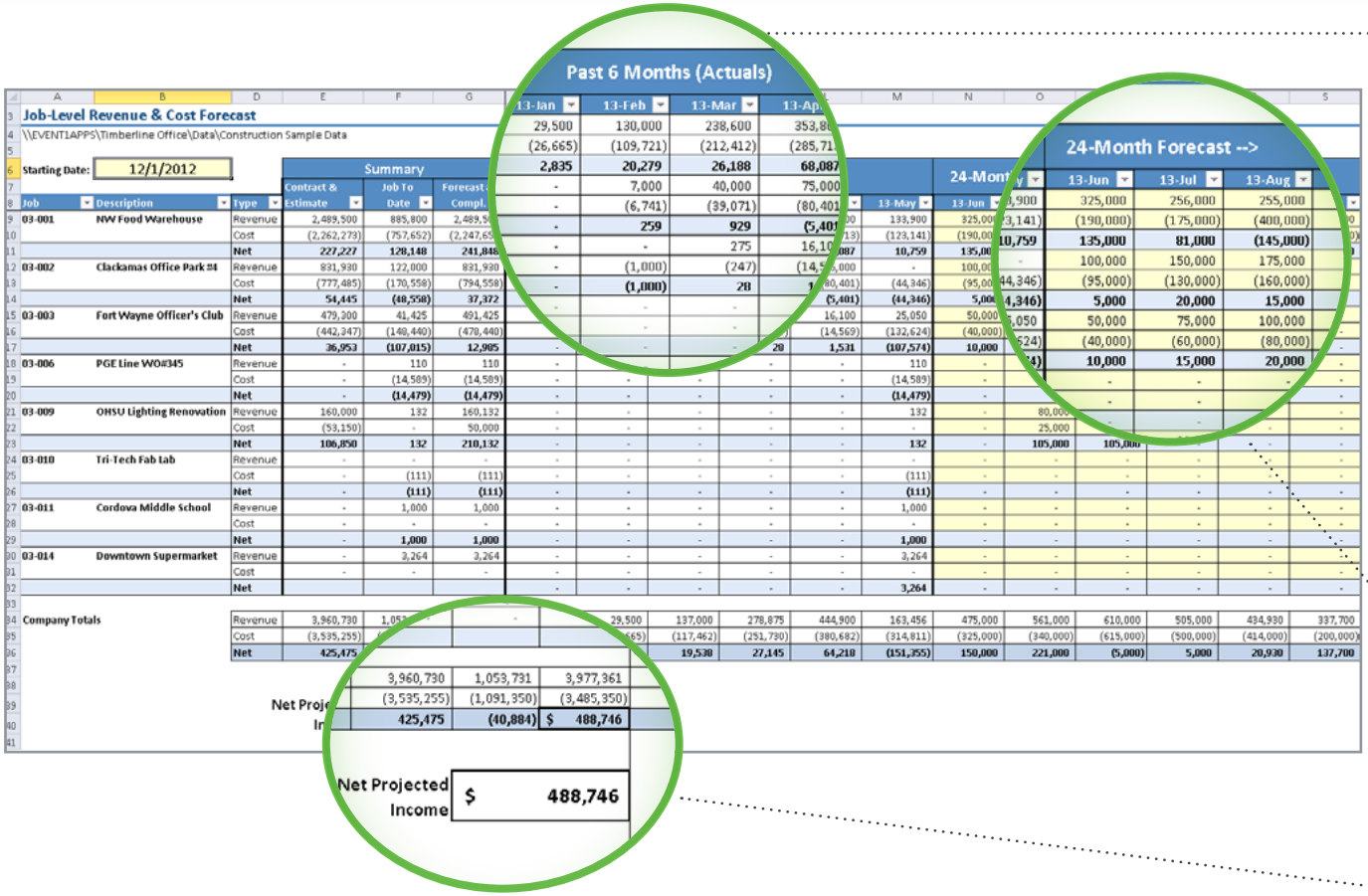
Proactively distribute reports by schedule, task, or on demand



- Generate reports using Sage 300 Construction and Real Estate and SAP Crystal Reports. Attach them to notifications that can be sent throughout your organization.

Easy reports and financials using Excel

Microsoft® Excel is an easy-to-use tool with which most of your office personnel will have experience. Using Sage Office Connector, you can create reports and analyze data in Excel including real-time information from Sage 300 Construction and Real Estate. Office Connector allows you to query, report, and move data back and forth between Excel and Sage 300, ensuring you always have the most up-to-date information.



- Harness the power of Microsoft Excel and the extensive data in Sage 300 Construction and Real Estate to analyze, forecast, and update your data directly from Excel.
- Record or update all of your job-level projections using actual to-date values and forecasts in Excel.
- Get insight into current and future trends and use data to make financial and project management decisions.
- Store future projections in Sage 300 Construction and Real Estate and make changes from within Excel.

If you'd like to learn how to create and analyze reports and hear best practices, check out the many training options at Sage University. For a demo, contact your authorized Sage business partner or call 800-628-6583.

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