

PRODUCT SHEET

Sage 300 Construction and Real Estate

Data Accessibility Features

Sage is the market leader in job cost accounting for construction and real estate companies with over 40 years of experience in the industry. Superior cost management is at the core of Sage 300 Construction & Real Estate. Features like Office Connector, Information Assistant, and Mobile Intelligence make Sage the right choice for your construction and real estate accounting needs.

Desktop

Simplifying workflow and saving time, Sage 300 Construction and Real Estate Desktop presents all the information and resources you need in a single location to efficiently manage your work.

From one screen, you're able to easily review mission-critical information and initiate tasks that are important to your role in the organization. The fully customizable Desktop acts as a personal home page to organize common tasks necessary for specific roles with the ability to create shortcuts to the applications you frequently use, access important resources such as documents or web content, and highlight important inquiries and reports. You can even set up your personal desktop to automatically deliver key business metrics in real-time.

Streamline implementation and maximize profitability with Desktop functionality such as:

- Setup Central speeds up implementation time and simplifies setup procedures to get your business up and running with Sage 300 Construction and Real Estate with minimal downtime.
- Job Central allows you to easily set up jobs and contracts from one convenient location to save you time and ensure job details are entered accurately.
- Workflow Centers integrate business processes to run more efficiently and accurately by delivering the information you need, when you need it, to drive better informed business decisions.

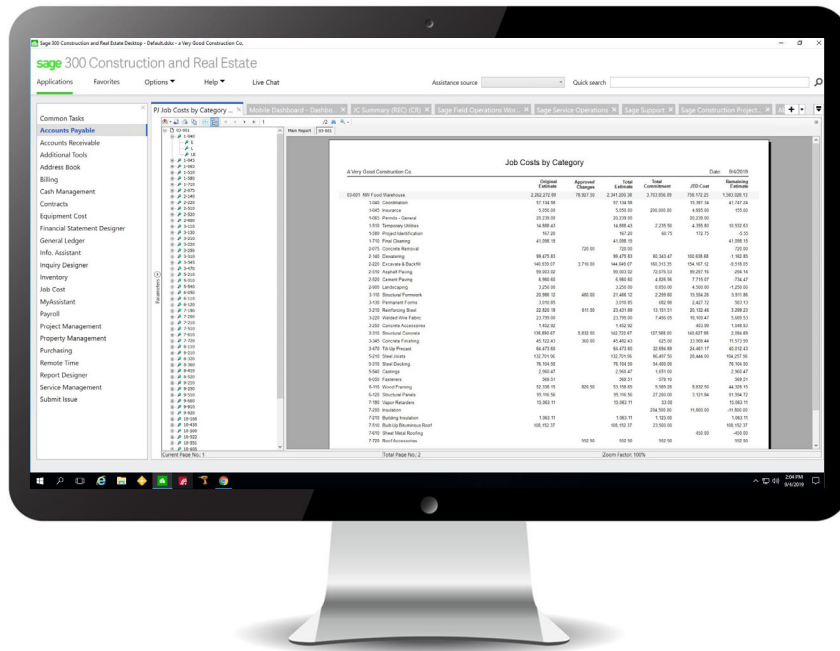
MyAssistant

Your personal activity and business monitor! The best way to keep an eye on your business and enable action is Sage 300 Construction and Real Estate MyAssistant. It proactively monitors key performance indicators, providing alerts with actionable information about issues in need of attention. MyAssistant automatically generates relevant reports, spreadsheets, and documents, then distributes this critical information into the hands of those who need it using an email alert to help project stakeholders monitor and manage all aspects of a project.

MyAssistant can act on nearly any scenario. Just tell it which information to monitor and who to share the alert with. Then easily stay aware of critical project details and prevent any chance of profit erosion!

Automatically deliver essential project related information such as:

- Identifying subcontractor insurance expirations and sending a personalized email requesting an updated certificate.
- Providing each project manager with a list of costs codes that are nearing their budget threshold.
- Generating and distributing each project manager's job reports on a regular schedule.
- Alerting affected parties when a change request, RFI, or submittal is overdue.
- Indicating jobs or contracts not billed in a certain number of days.



With so much information circulating throughout your business, it can be challenging to identify what's important. MyAssistant isn't just helpful for project-related alerts. Let MyAssistant act for you so you can focus your attention on more important tasks. It can help you respond quickly to any information relevant to your role.

Some examples of how MyAssistant can automate tasks include:

- Sending employees their direct deposit pay stubs.
- Identifying terminated employees and sending the insurance company a request to remove them from coverage.
- Auditing processes such as job, contract, or employee setup to ensure they are completed correctly.

These alerts are simple to set up and use. Choose from a list of over 300 prebuilt tasks or create your own alert conditions for limitless possibilities. Use MyAssistant to:

- Identify exactly what to monitor.
- Schedule a task to run at a specific time, after the completion of a task, or on demand.
- Identify who will be notified and the information they will receive.

MyCommunicator for Outlook®

Sage 300 Construction and Real Estate MyCommunicator for Outlook is a powerful addition to Sage MyAssistant that uses the familiar Outlook email environment to directly access, track, and update your Sage 300 Construction and Real Estate data in real time. While MyAssistant issues automatic alerts, generates reports, and distributes documents, MyCommunicator extends that power with the ability to monitor, assign, and follow up on key activities without leaving your email inbox.

Leverage the power of Outlook to request information, share important data, manage to-dos, and set reminders. Sage 300 Construction and Real Estate data is embedded directly within your email, providing drill-down access to additional details as needed, so you can proactively make decisions, assign and monitor actionable tasks for employees and vendors, and improve communication both inside and outside your business. Stay connected and informed, all from within Outlook

Leverage MyCommunicator for Outlook to:

- Ensure your data is current by updating important Sage 300 Construction and Real Estate data directly from Microsoft Outlook.
- Streamline workflow processes using one centralized location.
- Stay organized and keep projects running smoothly by tracking, assigning, and following up on key activities from within Microsoft® Outlook.

Office Connector

Sage 300 Construction and Real Estate Office Connector amplifies your construction financial data with the power of Excel. Get up and running quickly with prebuilt queries and discover the ease of use that will help reduce the time you spend on reporting and analysis.

Office Connector consists of three solutions that allow you to query, report, write, and import data in Sage 300 Construction and Real Estate using Microsoft Excel:

- Office Connector Query – Automatically retrieve data from Sage 300 Construction and Real Estate for analysis and data manipulation using familiar Excel reports, worksheets, and graphs.
- Office Connector Write – Map data from your Excel worksheets and forms to corresponding writable fields in Sage 300 Construction and Real Estate.
- Office Connector Import – Save Excel worksheets in a format that can be imported into Sage 300 Construction and Real Estate.

These innovative solutions will transform the way you work with your Sage 300 Construction and Real Estate data, expanding your analysis and reporting options through a familiar set of tools.

The benefit of utilizing Office Connector include:

- Reduce time spent on data entry by sending Excel data directly to Sage 300 Construction and Real Estate using mapped values.
- Empower your team to use Excel as a productivity tool and import Excel files into Sage 300 Construction and Real Estate with no modification necessary.
- Improve workflow and reporting with seamless access to your construction financial data from Excel.

Information Assistant Overview

Gain convenient access to Sage 300 Construction and Real Estate reports and inquiries without opening the software. Information Assistant in Sage 300 Construction and Real Estate is ideal for employees who need access to the data, but don't necessarily need to use the full solution.

In addition to providing your staff with the information they need to make better business decisions, Information Assistant can also help employees keep an eye on everything from insurance expirations to cost overruns with issue tracking. Log issues into a spreadsheet-style grid and classify the status and level of urgency, along with who should follow up and how. Information Assistant can send email messages to notify anyone about an issue or the information can be easily accessed through an inquiry or report.

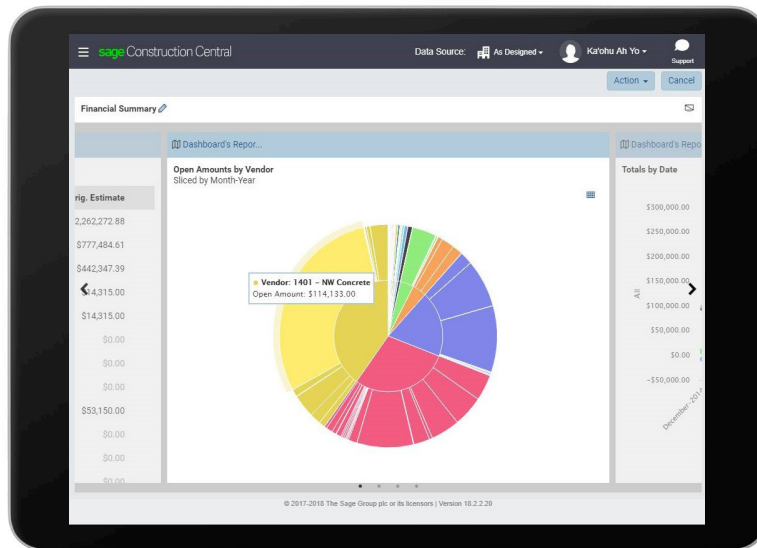
Information Assistant will help you:

- Save valuable time accessing reports and inquiries without opening accounting modules.
- Track issues critical to your productivity.
- Easily define security settings for the access of important information.

Mobile Intelligence

Visualize your data anytime, anywhere from a web browser on your PC or mobile device. Take your data even further with drill down reporting functionality to expand specific details within a report or create custom dashboards to tailor your experience to the unique needs of your business.

Mobile Intelligence includes Mobile Reports, Dashboard Viewer, and Dashboard Designer, which are all included with Information Assistant.



With Mobile Reports you can:

- Improve reporting performance and flexibility with the ability to query your data in real-time.
- Ensure the security of your data with automatic backup and easy database maintenance and administration.
- Work more efficiently by accessing critical reports anywhere, anytime, on any mobile device.

Access to your Sage 300 Construction and Real Estate financial data is easier than ever with Mobile Reports.

Next, take your data even further with custom dashboards designed to deliver information tailored to any role, with visuals that make financial data insights more clear and actionable.

With Dashboard Viewer and Designer you can:

- Visualize company, project, and employee performance data.
- Access financial information anytime, anywhere from any web browser on your PC or mobile device.
- Understand all the details with drill down reporting functionality to expand specific details within any report.
- Create custom dashboards based on existing report tables or reports unique to your business with display options such as charts, forms, gauges, grids, or maps.
- Arrange your information with preset templates or use drag and drop positioning for that perfect design.

Gain insight from anywhere with easy dashboard reporting using any web browser on your mobile device or PC.

For more information contact your Sage business partner or customer account manager at **SageCRE.com** or **800-628-6583**.

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