

# Sage Construction Management - Mobile Apps Overview

November 2023



Sage

# Built for Collaboration & Mobility



Browser Solution



Mobile App  
Android/iOS

Anytime, anywhere access



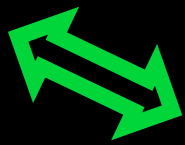
External project team members  
(portal for customers, vendors, subs.)

**Team Link Portal**



Finance team members  
(streamlined workflow & collaboration)

**Accounting Links**

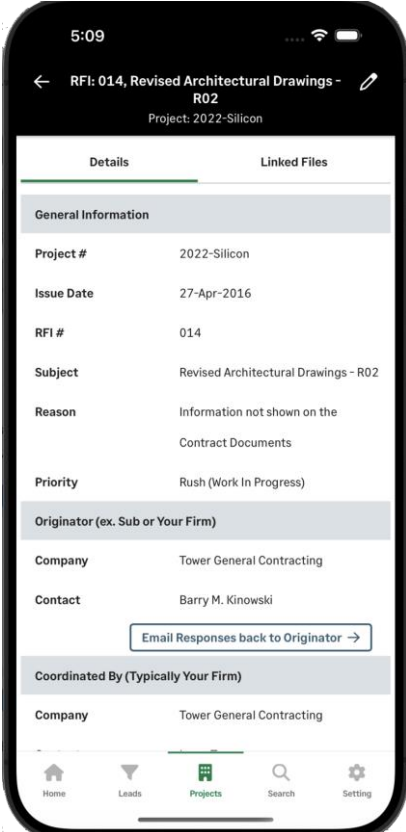
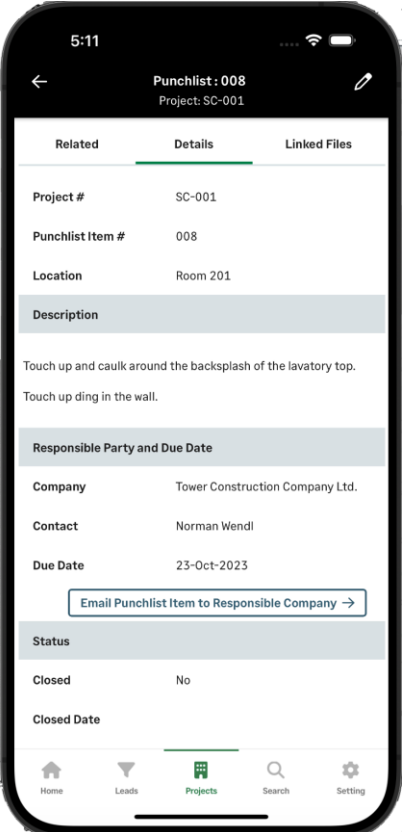
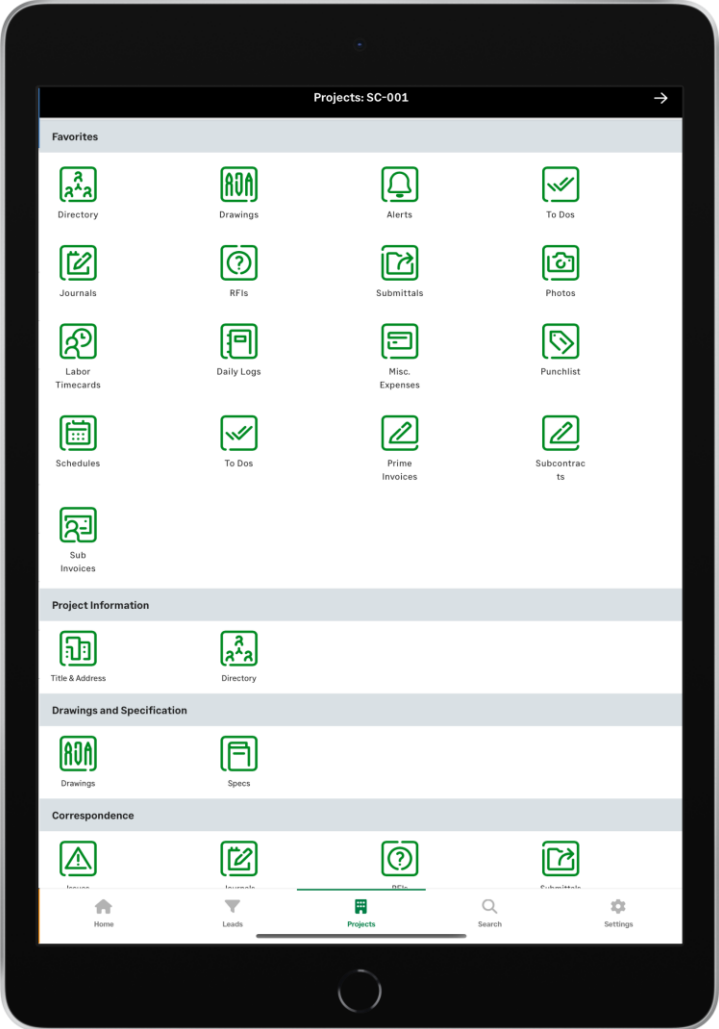


# Mobile Apps for Android & iOS Devices

Mobile Apps for Android and iOS devices are free to all subscribers but are especially geared for field staff that are on the go. Information entered in the Mobile Apps will immediately appear in Sage CM. Thus, access to real time data is just a click away.

### Highlights:

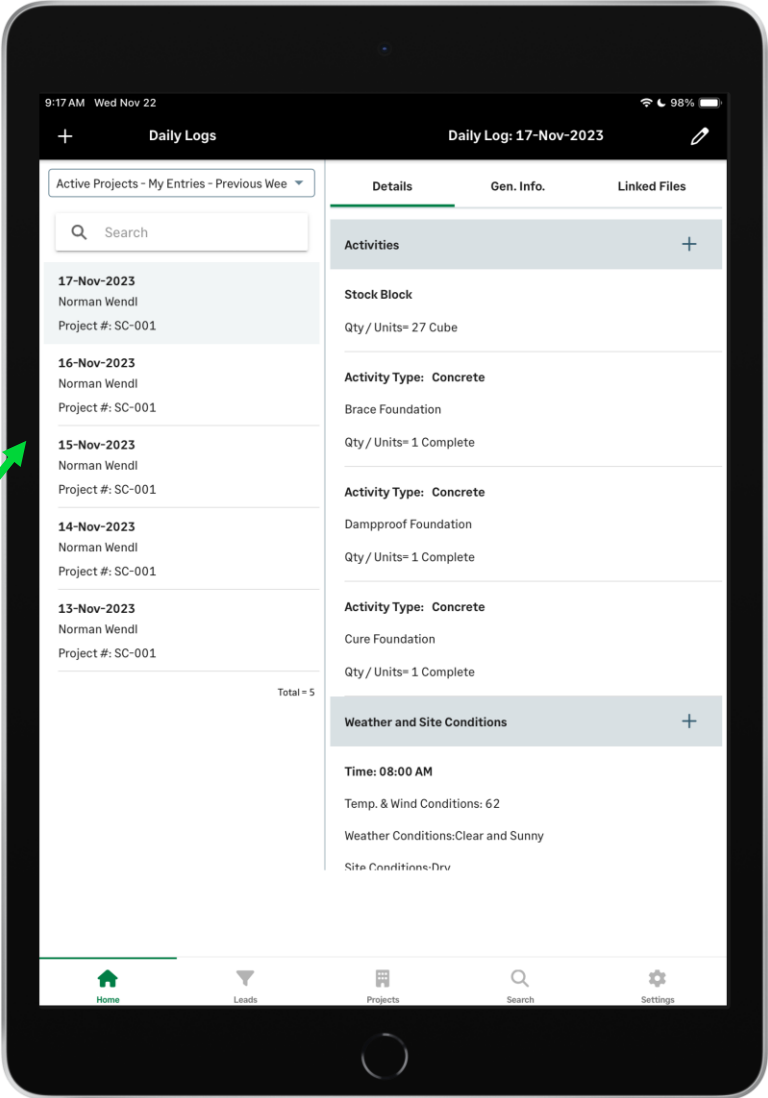
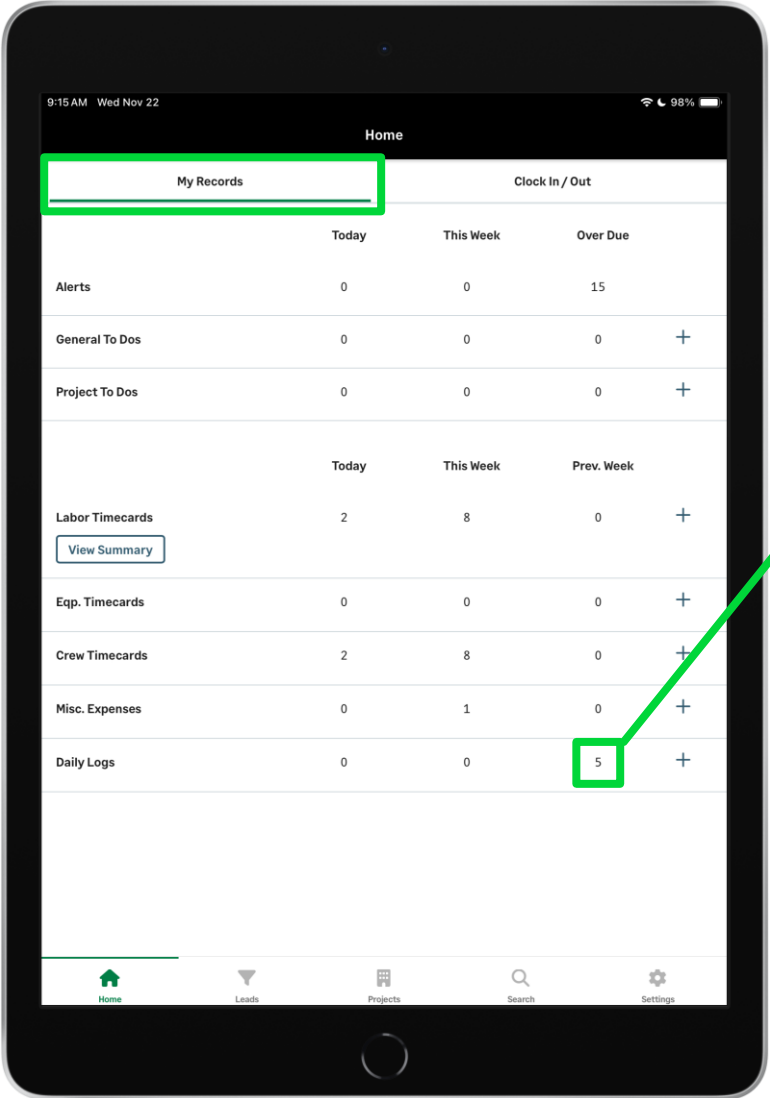
- Utilizes the latest mobile technologies.
- Biometric options (ie. finger and facial recognition) to login to App.
- Separate Read and Edit forms to avoid data entry mistakes.
- Streamlined data entry process for all features.
- Clock In/Clock Out feature with Geotagging for Employees and Crews
- Email options for features such as Journals and RFIs including templates to standardize messaging.



# Home View

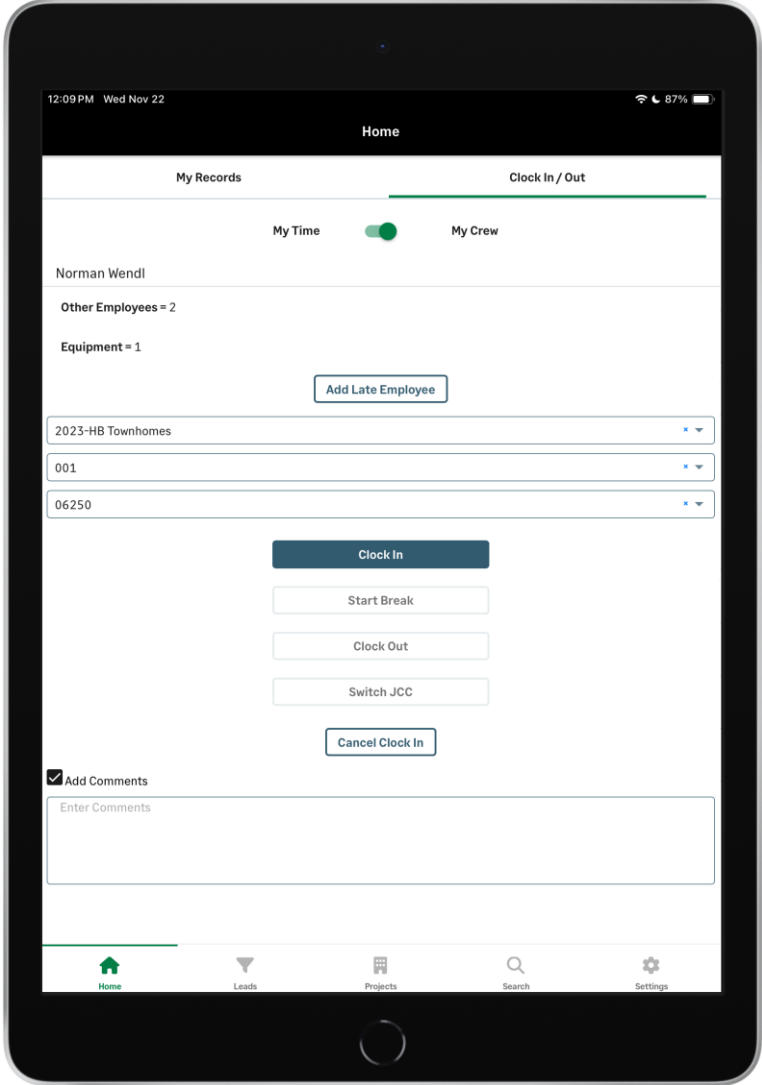
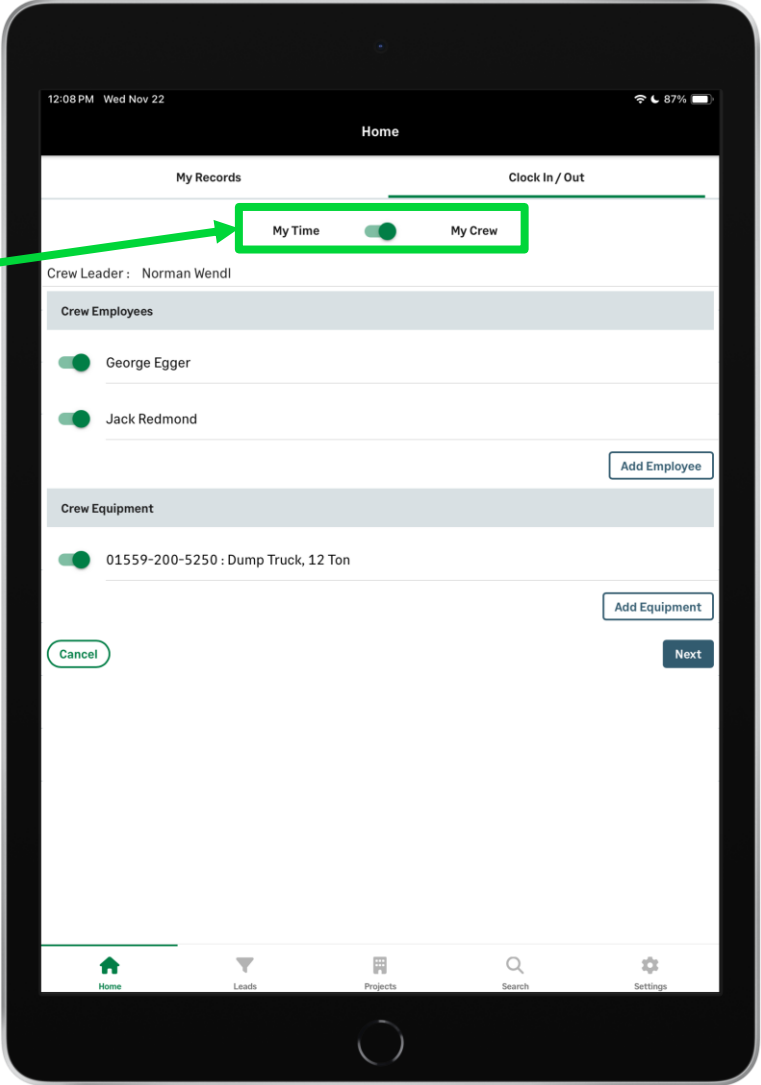
Upon logging into the app, users will have immediate access to entries that are typically done on a daily basis such as timecards, expenses and daily logs.

Companies that have enabled workflow for transaction approvals is also incorporated into the App as shown on the right.



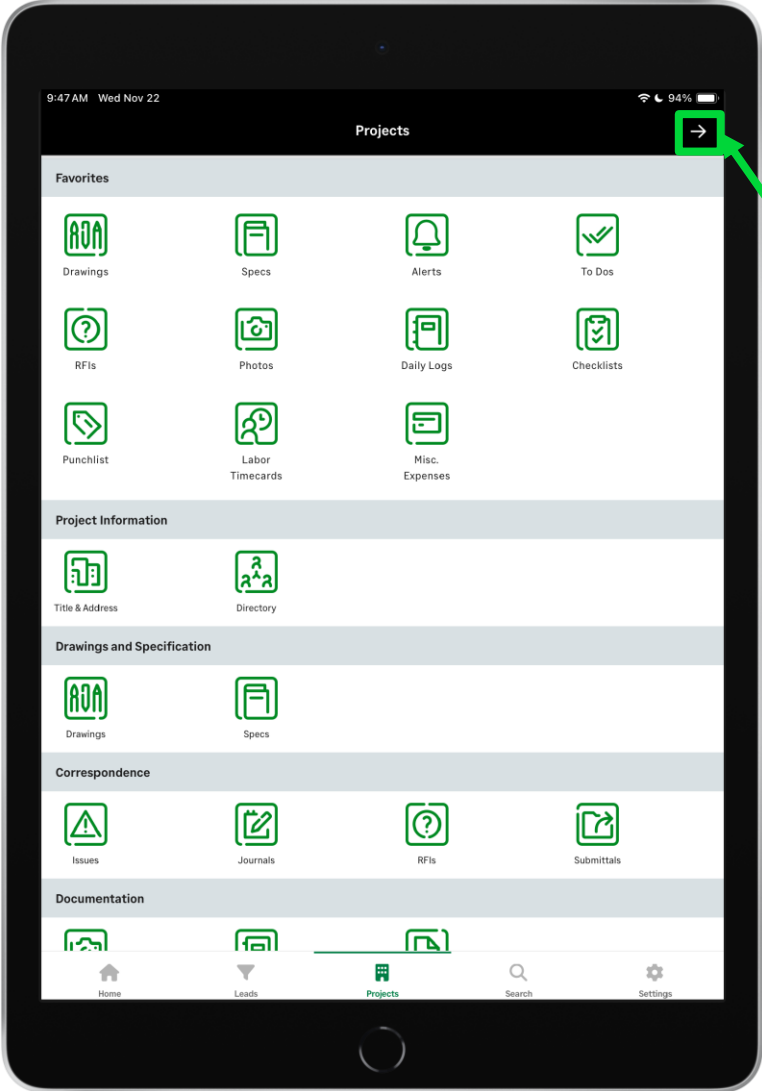
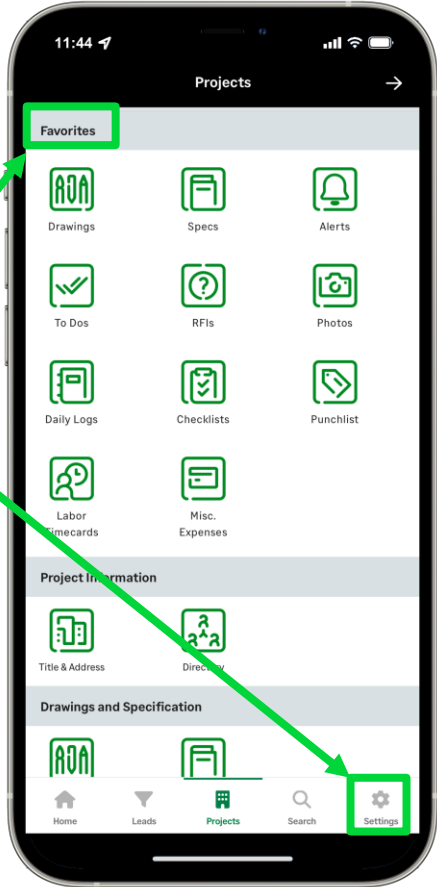
# Clock In / Clock Out

Employees or Crews can quickly Clock In or Out directly from the Home View.



# Projects View

Users can select their own Favorite Features in their Profile which minimizes scrolling on Lead and Project Menus.



Click Right Arrow to select Current Project



# Mobile App Features for Leads and Projects

Permissions: Read (R), Edit (E), Add (A), Delete (D)

Feature	R, E, A, D	Email Option
<b>Contact Management Module</b>		
Companies	R	
Contacts	R, E, A	
<b>Project Leads (aka Job Opportunities)</b>		
Project Lead - Add Wizard	A	
Project Lead - Title and Address	R, E	
Project Lead - Directory	R, A, D	
<b>Projects</b>		
Project - Title and Address	R, E	
Project Directory - Listing	R, A, D	
Project Directory - Company Status	R	
<b>Drawings and Specifications</b>		
Drawings	R	
Specifications	R	
<b>Alerts, To Dos and Scheduling</b>		
Alerts	R	
Workflow Alerts and Approvals	R, E	
General and Project To Dos	R, E, A, D	
Schedules and Tasks	R, E	

Feature	R, E, A, D	Email Option
<b>Correspondence</b>		
Issues	R, E, A, D	Yes
Journals	R, E, A, D	Yes
Request For Information (RFI)	R, E, A, D	Yes
Submittals	R	
<b>Documentation</b>		
Photos	R, E, A, D	
Daily Logs	R, E, A, D	
Work Orders (WO)	R, E	
<b>Quality Control (QC)</b>		
Checklists	R, E, A, D	
Comply Notice	R, E, A, D	Yes
Permits	R, E, A, D	
Punchlist Items	R, E, A, D	Yes
Test and Inspections	R, E, A	
<b>Safety</b>		
Site Hazard Assessment	R, E, A, D	
Safety Incident	R, E, A, D	
Safety Meetings	R, E, A, D	

Feature	R, E, A, D	Email Option
<b>Contract Administration</b>		
Prime Contract	R	
Change Proposal Request (CPR)	R	
Change Order (CO)	R	
Prime Invoices	R	
<b>Procurement</b>		
POs	R, E, A, D	Yes
Bills	R, E, A, D	
Subcontract	R	
Subcontract Change Order (SCO)	R	
Subcontract Invoices	R	
<b>Time and Misc. Expenses</b>		
Labor Timecards	R, E, A, D	
Labor Check In / Check Out	A	
Equipment Timecards	R, E, A, D	
Misc. Expenses	R, E, A, D	
<b>Analytics (Coming Soon)</b>		
Lead Analytics	R	
Project Financial Analytics	R	

# Adding Project Information

Each feature has a dedicated Add Wizard for ease of use and streamlined data entry!

Next Step

11:44

✕ Add Punchlist Item  
Project: 2023-Kramer

Project \* 2023-Kramer

Take Photo

Add Files

Click Next to skip this step if no photos are needed

Punchlist Item Image

Home Leads Projects Search Settings

11:44

✕ Add Punchlist Item  
Project: 2023-Kramer

Existing Inspection Date

New Inspection Date

Do not specify Inspection Date

New Inspection Date

Inspection Date \* 22-Nov-2023

Inspector 1 - Company Tower Construction Company Ltd

Inspector 1 - Contact \* Mike Miller

Inspector 2 - Company Kramer, Jack and Laurie

Inspector 2 - Contact Select Contact

Inspector 3 - Company Select Company

Inspector 3 - Contact Select Contact

Home Leads Projects Search Settings

11:44

✕ Add Punchlist Item  
Project: 2023-Kramer

Punchlist Item Information

Item # \* 001

Location \* Kitchen

Description \*

Adjust all cabinet doors in kitchen so they are aligned properly.

Responsible Party and Due Date

Company Select Company

Contact Select Contact

Due Date Select date

Home Leads Projects Search Settings

Save

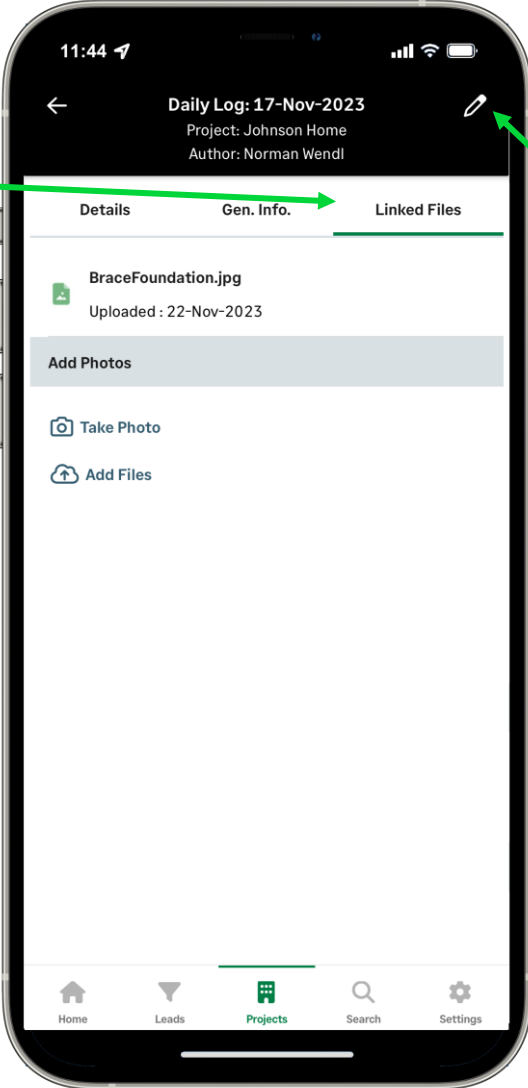
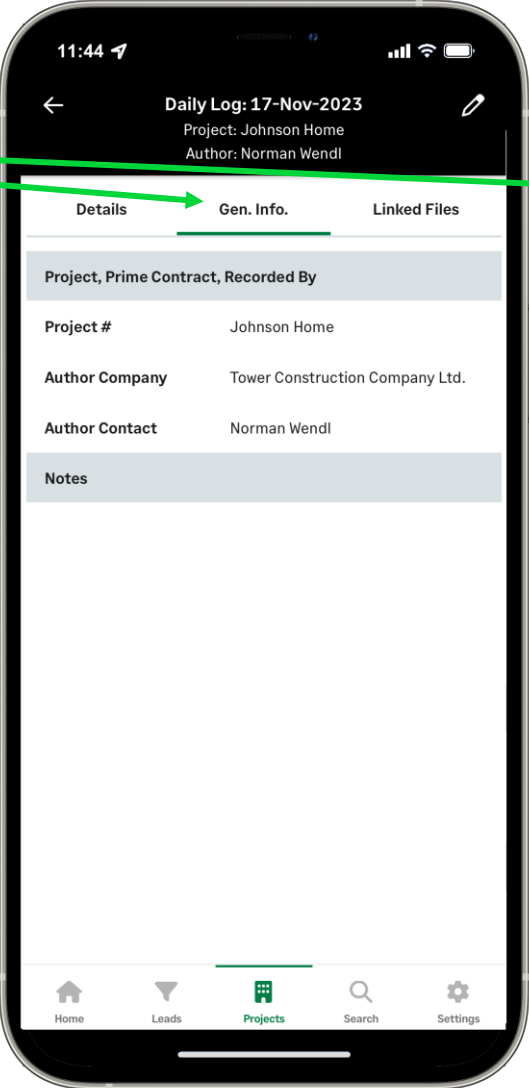
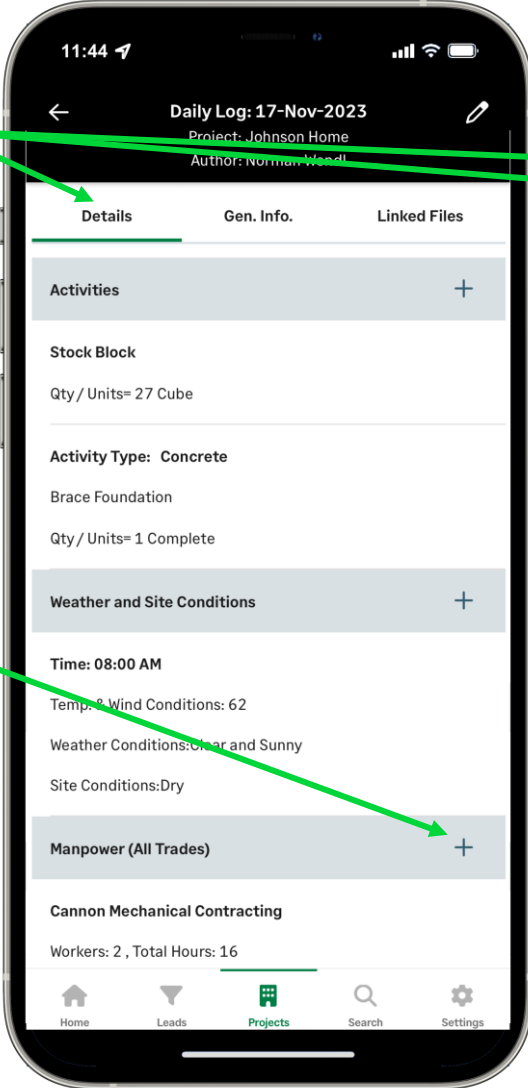
\* Required fields



# Project Information Form Layout

There can be up to three tabs of information depending on the type of Project record.

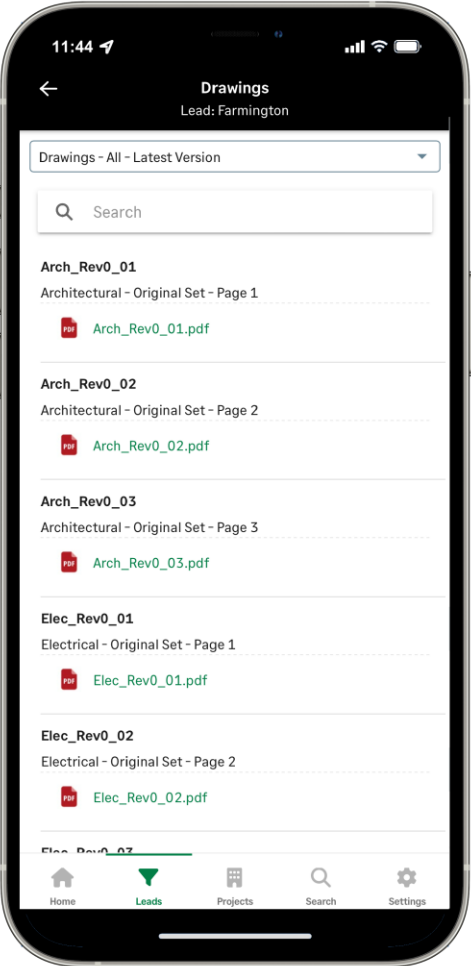
Certain features such as Daily Logs and POs have sub-tables. Clicking the plus sign (+) will allow the user to enter additional items.



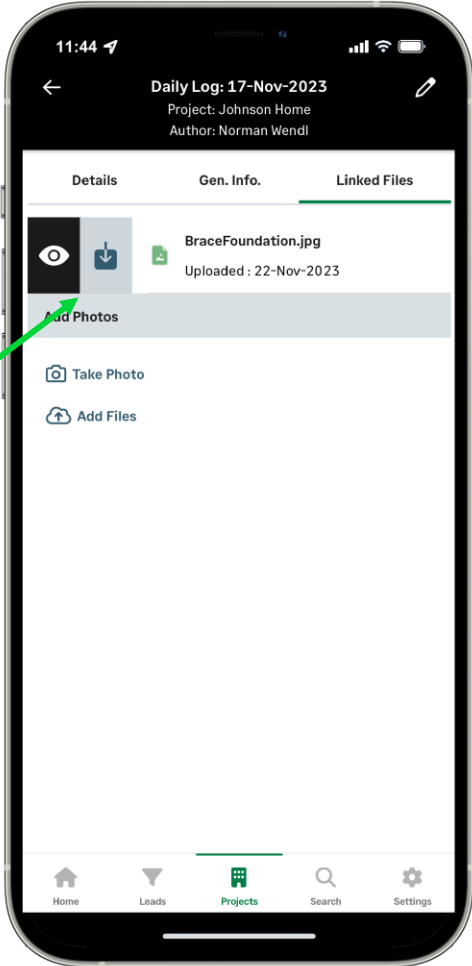
By default, information is shown in read only mode to prevent accidental data entry mistakes. Clicking the pencil icon will switch to edit mode.

# Linked Files

Drawings Listing with Linked Files

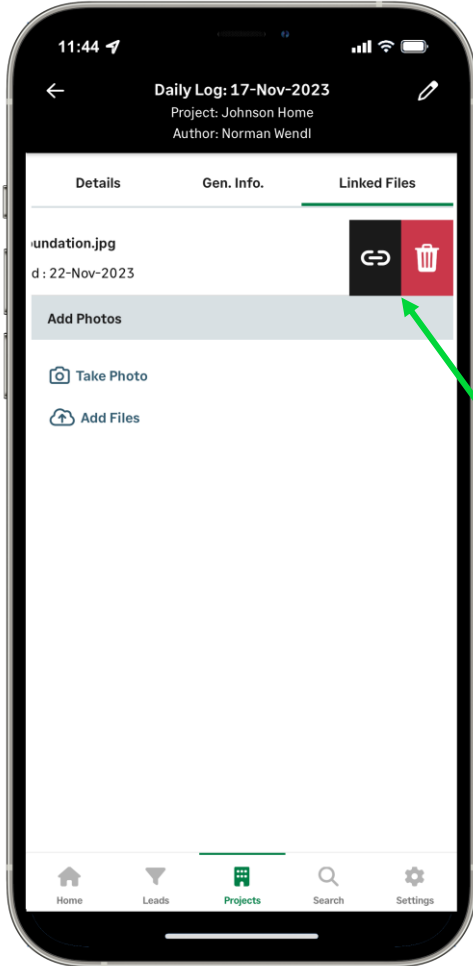


Linked Files – Swipe Left to Right



Preview File  
in Document  
Viewer or  
Download

Linked Files – Swipe Right to Left



Unlink File to  
project record  
or Delete

# Linked Files Document Viewer

Use Sage CM's built-in Document Viewer and advanced markup tool to highlight areas of interest and add notes to Drawings, Specs and Linked Files.

