

Sage Construction Management Overview

November 2023



Sage

About Sage Construction Management (CM)

Primary Markets

United States, Canada, Australia, and New Zealand

Construction Software Focus

Project Operations: Preconstruction, project management, job cost control, scheduling and collaboration

Ideal Customers

Commercial GCs, commercial subcontractors, specialty contractors, custom homebuilders, design-build and engineering firms

Sage Construction Management Benefits

- One platform to manage Project Operations
- Access the software at any time from anywhere and from any device
- Know exactly where you stand with every job so you can make quick and informed decisions
- Maximize project profitability out in the field using Sage CM's comprehensive job costing features and dashboards
- Integration options are available for popular SMB accounting and ERP systems eliminating duplicate data entry and maintaining consistency across the organization

Sage CM's Product Line

Browser Solution

Sage CM's flagship product. Cloud-based suite of software for project-based operations: preconstruction, project management, job cost control, and scheduling.

Mobile Apps for Android & iOS Devices

Downloadable Apps that are free to all Sage CM Subscribers and provide access to crucial project information, especially for employees and management who are out in the field.

TeamLink Portal

Collaboration portal for Sage CM Subscribers to share project information with their Customers, Vendors, Architects and Consultants.

Accounting Links

Utilities that integrate Sage CM's financials with small accounting and ERP systems such as Intuit QuickBooks, Sage 50 Canada, Sage Intacct (most robust), and Xero.

Built for Collaboration & Mobility



Browser Solution



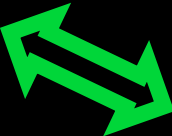
Mobile App
Android/iOS

Anytime, anywhere access



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

TeamLink Portal



Finance team members
(streamlined workflow & collaboration)

Accounting Links



Construction & Engineering Firm Departments

Estimating Department

Sage CM Browser Solution:

- Document Leads (Opportunities)
- Upload Drawings and Specifications
- Invite Subs & Suppliers to Bid (ITB)
- Prepare Estimate(s)
- Prepare RFP Packages
- Track Lead Status using Stages
- Lead Analytics (e.g. Win/Losses)

Project Mgmt. & Field Staff

Sage CM Browser Solution & Mobile Apps:

- Contract Administration
- Procurement
- Timecards & Misc. Expenses
- Project Financial Analytics
- Correspondence
- Documentation
- QC & Safety
- Scheduling

Sage CM TeamLink Portal:

- Client, Architect and Subcontractor Collaboration

Accounting Department

Sage CM Browser Solution:

- Contract Administration
- Procurement
- HR, Timecards & Misc. Expenses
- Project Financial Analytics

Sage CM Accounting Link:

- Sync Customers, Vendors, Employees
- Post Project Transactions
- Import Payment Status Information

SMB Accounting or ERP System:

- Payroll
- Payments
- Deposits
- Reconciliations
- Corporate Financial Reporting

Lead Tracking

- **Categorize Leads any way you want so it fits your process, for example:**
 - Lead Source: Referral, Bid Invite, Advertisement
 - Structure: Custom Home, School, Medical Facility, Retail Facility

- **Gain better insights into job opportunities by easily setting the status of each Lead using Stages, for example:**
 - Bidding
 - Bid Submitted
 - Awarded
 - Not Awarded

- **Upon award, quickly move lead information to projects with a click of a button.**
 - Drawings, Specs
 - Estimates
 - RFP Packages
 - Correspondence

The screenshot displays the Sage Construction Management interface for a lead titled "Farmington : Farmington Elementary School". The interface is divided into several sections:

- Lead Info:** Includes a "Quick Select" dropdown for the lead, "Lead Stats" for Active and Inactive leads, and a "Last Stage Analysis - Trailing 90 Days" table.
- Lead Home:** Shows a photo of the school, address (1378 2nd St., Farmington, MO 63398, USA), and contact information for Sales, Bid, and PM contacts (Barry M. Kinowski).
- Stage:** A table showing the lead's progression through stages: Bidding, Bid Submitted, and Awarded, with associated dates and amounts.
- Quick Links:** Includes "General Info" and "Linked Files".
- Favorites:** A section with icons for Drawings, Specifications, Estimates, RFIs, and Photos.
- Lead and RFP Package Calendar:** A calendar view showing dates from 26 to 9, with a highlighted date (30) for "Mountain High Con".
- Changes in Past 7 Days:** A summary table showing 0 Lead Adds and 0 Lead Updates.
- Last Stage Analysis - Past Quarter:** A donut chart showing the distribution of leads across stages: Bidding (blue), Bid Submitted (red), Awarded (yellow), and Bid Lost (purple).

Stage	# of Leads	Amount
Bidding	2	\$4,900,000.00
Bid Submitted	1	\$2,570,000.00
Awarded	1	\$4,047,188.96
Bid Lost	1	\$3,900,500.00

Stage Name	Stage Date	Estimated Close Date	Amount	Action
Bidding	18-Sep-2023	11-Oct-2023	\$0.00	Delete
Bid Submitted	11-Oct-2023	11-Oct-2023	\$4,047,188.96	Delete
Awarded	13-Oct-2023	11-Oct-2023	\$4,047,188.96	Delete

Lead Adds	0
Lead Updates	0

Estimates

- True Team-based Estimating: Multiple estimators can work on the same estimate at the same time.
- Create multiple estimates per Lead or Project: Base Bid, Rev 1, Rev 2
- Organize Estimates by Cost Code and Location
- Add Items on the fly, from your own Cost Database, or an industry standard source such as RS Means
- Document Inclusions or Exclusions by Cost Code
- Add Markups at Line Item level or Globally
- Integrated RFP Packages
 - Send Bid Invites to Vendors via Email
 - Allow Vendors to Submit Pricing Online via Sage CM's TeamLink Portal
 - Compare vendor pricing side-by-side using the Bid Analysis feature
 - Update estimate line item pricing with Awarded Vendor's pricing
- Generate Estimate Proposals with one click

The screenshot displays the Sage Construction Management interface for 'Tower Construction Company Ltd.' The main view is 'Estimate # 001 : Base Bid'. The interface includes a navigation sidebar on the left with icons for home, users, and various project management functions. The main content area shows the 'Estimate Summary / Reports' tab, which includes a summary table, a bar chart for 'Cost v/s Sell Total', and a pie chart for 'Cost Breakdown by Resource'.

Estimate Summary Table:

	Materials (M)	Labor (L)	Equipment (E)	Sub (S)	Other (O)	Total	Portion Allowances
Sell Total	\$2,276,222.04	\$791,411.32	\$1,841.44	\$982,983.20	\$0.00	\$4,052,458.00	\$0.00
Cost Total	\$1,979,323.52	\$688,171.07	\$1,601.25	\$854,768.00	\$0.00	\$3,523,863.84	\$0.00
Sell Total - Cost Total	\$296,898.52	\$103,240.25	\$240.19	\$128,215.20	\$0.00	\$528,594.16	--
ProfitMargin	16.20%	15.00%	15.00%	15.00%	0.00%	15.65%	--
Hours Total	--	30676.2871	600468.2	--	--	--	--

Cost v/s Sell Total Chart: A bar chart comparing Cost (orange) and Sell (green) for categories M, L, E, S, and O. The Y-axis ranges from \$0 to \$3,000,000.

Cost Breakdown by Resource: A pie chart showing the distribution of costs across resources M, L, E, S, and O.

Estimate Line Items Table:

Item ID	Description	Quantity	Unit	Material Cost	Labor Cost	Equipment Cost	Sub Cost	Other Cost	Total Cost	Sell Price	Profit
31 00 00	Earthwork						\$225,203.07		\$225,190.31	+	
6	Asphaltic concrete pavement, paving, bind	8530	S.Y.	\$6.2104	\$52,971.30	\$6.2104	\$52,974.71				
7	Asphaltic concrete pavement, paving, wear	8530	S.Y.	\$3.4104	\$29,087.30	\$3.4104	\$29,090.71				
8	Backfill by hand, no compaction, light so	30	C.Y.	\$9.9990	\$300.00	\$9.9990	\$299.97				
9	Backfill trench, f.e.loader, wheel mtd.,	287	C.Y.	\$0.6292	\$180.81	\$0.6292	\$180.58				
10	Backfill, dozer, footings & spread excess	390	C.Y.	\$0.2794	\$109.20	\$0.2794	\$108.97				
11	Base course, roadways & large areas, 3/4"	8530	S.Y.	\$6.7594	\$57,662.80	\$6.7594	\$57,657.68				

Contract Administration

- Built-in Wizards to setup Job Cost Codes, Client/Prime Contract, and Budgets using a Sage CM Estimate, spreadsheet, or from master cost codes
- Track multiple Prime Contract per Project (ex. Design/Build, Bldg. 1 & 2)
- Contract types supported: Fixed Lump Sum, Cost Plus and Unit Price
- Budgets: Contract Amount, Internal Cost Budgets, Labor Hours and Equipment Hours
- Comprehensive Change Management: Change Proposal Request (CPR) and Change Order (CO)
- Pending, Approved and Not Approved Status Options for all Contract Admin features
- Percent Complete Style Invoicing with Retention or Holdback Tracking
- Export Prime Invoices to an Accounting or ERP system using a Sage CM's Accounting Link

The screenshot displays the Sage Construction Management interface for Tower Construction Company Ltd. The main view is 'Prime Contract Invoice Information' for Invoice # 004, Order Number 4. The interface is divided into several sections:

- Contract Admin Prerequisites:** A table showing the status of prerequisites:

	Total
Project Directory	63
Project Directory without Ins.	20
Project Directory with Exp. Ins.	43
- Contract Admin Setup Wizard:** A section for creating Job Cost Codes, Prime Contract, and Budgets.
- Stats:** A table showing approved totals for various contract types:

	Approved Total
Job Cost Codes	--
Prime Contracts	\$928,538.00
Allowance Packages	--
CPRs	\$109,127.72
COs	\$103,496.90
Prime Invoices	\$74,230.19
- Prime Contract Invoice Information:** Details for Silicon Technology Corporation Michael CarrollIT: (949) 453-2646. Status: Approved. Project: SC-001. Issue Date: 27-Oct-2023. Payment Due: 26-Nov-2023.
- Invoice Details:** Links to view details for Original Prime Contract Items, CO Items, and Released Retainage.
- Financial Summary:** A table summarizing the invoice components:

	Gross Amount	Subtotal	Tax	Total
Original Prime Contract	--	\$928,538.00	\$0.00	\$928,538.00
Approved COs	--	\$103,496.90	\$0.00	\$103,496.90
Revised Prime Contract	\$1,032,034.90	\$1,032,034.90	\$0.00	\$1,032,034.90
Prev. Prime Invoices	\$33,900.00	\$30,510.00	\$0.00	\$30,510.00
Current Prime Invoice	\$40,410.00	\$36,369.00	\$1,818.45	\$38,187.45
Total Prime Invoices	\$74,310.00	\$66,879.00	\$1,818.45	\$68,697.45
- Net Retainage Summary:** A table showing retainage percentages and amounts:

	Work	Stored	Total
Retainage Percentages	10.0000%	10.0000%	
Previous Retainage	\$3,390.00	\$0.00	\$3,390.00
Current Retainage	\$4,041.00	\$0.00	\$4,041.00
Current Retainage Billed	\$0.00	\$0.00	\$0.00
Total Net Retainage	\$7,431.00	\$0.00	\$7,431.00

Procurement

Integrate Estimating with Procurement

Sage CM's Procurement Wizard can copy Estimate items and RFP Packages to POs and/or Subcontracts saving time by eliminating duplicate data entry and minimizing mistakes.

Separate Processes for Suppliers and Subs

There are different requirements when it comes to purchasing materials from suppliers versus obtaining services from subs. This is why there are separate features for each.

- PO & Bill
- Subcontract, SCO & Sub Invoices
 - Contract Types: Fixed Lump Sum, Cost Plus, and Unit Price
 - Percent Complete Style Invoicing with Retention or Holdback Tracking

Export Bills and Sub Invoices to your Accounting System

Sage CM has tight integration with many popular accounting and ERP systems eliminating duplicate data entry.

The screenshot displays the Sage Construction Management interface for 'Tower Construction Company Ltd.' on project 'SC-001: Silicon Technologies - Tenant Improvement'. The main 'Procurement' section includes a table of prerequisites, a list of related functions, and a bar chart of transaction values. A mobile app overlay shows a 'Contract Administration' screen with various procurement-related icons.

	Total
Project Directory	63
Project Directory without Ins.	20
Project Directory with Exp. Ins.	43
Job Cost Codes	37
Approved Prime Contracts	1

	Approved Total	Approved	Pending
Anticipated Costs	\$0.00	0	--
RFP Packages	\$0.00	--	--
POs	\$53,148.53	5	0
Bills	\$4,211.75	2	0
Subcontracts	\$669,095.00	23	0
SCOs	\$19,000.00	11	2
Sub Invoices	\$64,957.50	4	0

Financial Transaction Approvals

Transaction Approval Status Options:

Admin, Procurement, and Time Tracking features have status options such as Draft, Pending, Approved, and Not Approved. This is not available in many popular accounting systems and provides your staff more control when it comes to project financials.

Enterprise Grade Workflow Rules:

Workflow functionality is included in the solution where rules can be established based on transaction type (ex. POs, Subcontracts, Changes, Invoices) and value (ex. > \$50K). When enabled, alerts will be automatically sent via email to approvers so transactions can be reviewed in a timely manner.

The screenshot displays the Sage Construction Management interface for Tower Construction Company Ltd. The main window is titled 'Add Workflow Rule' under 'Contracts & Procurements Workflow Settings'. The configuration is for 'Step3 - Action' and includes the following details:

- Approver 1:** PM Contact of Project
- Approver 2:** Norman Wendl
- Logic:** AND
- Flow Type:** Sequential
- Approval Period:** 5 days

A progress bar shows '75% completed' with a message: 'Your work flow have not saved. Please click the save button.' Buttons for 'Previous' and 'Save' are visible at the bottom.

To the right, a 'Flow Chart' illustrates the approval process:

- Start** leads to **Procurement**, then **Subcontract**.
- A decision diamond asks: 'Required action Total > 100000'.
- If 'No', the path leads to 'No Action Required' and then to 'End'.
- If 'Yes', the path leads to 'Approved by'.
- 'Approved by' leads to a decision diamond for 'PM Contact of Project'.
- If 'No' to 'PM Contact of Project', the path leads to 'Not approved' and then to 'End'.
- If 'Yes' to 'PM Contact of Project', the path leads to a decision diamond for 'Norman Wendl'.
- If 'No' to 'Norman Wendl', the path leads to 'Not approved' and then to 'End'.
- If 'Yes' to 'Norman Wendl', the path leads to 'Approved' and then to 'End'.

Time Tracking

For companies that self-perform work, tracking employee labor and/or equipment on a daily or weekly basis is crucial for keeping projects in line with budgets. Unlike many time-tracking systems, Sage CM is specifically designed to address the demands of the engineering and construction industry.

Highlights

- Import, export, and sync employees via Accounting Links
- Default and project-specific cost and bill rates
- Daily and weekly data entry forms for employees and crews including Clock In/Out options
- Pending, approved and not approved transaction status
- Billable status for invoicing cost plus projects
- Labor and Equipment Analysis Dashboards that calculate future savings or cost overruns
- Export options to CSV, Excel and via Accounting Links

The screenshot displays the Sage Construction Management interface for 'Tower Construction Company Ltd.' on the project '2023-Kramer: Kramer Residence - New Construction'. The main section is titled 'Add Individual Employee Timecards'. It includes a form for Date (09-Oct-2023), Company (Tower Construction Company Ltd.), and Employee (Norman Wendl). There are options to 'Copy entry for next' and a '0 days' field. Below this is a table for adding time entries:

	Entry 1	Entry 2	Entry 3	Entry 4
Project *	2023-Kramer x	2023-Kramer x	Select Project	Select Project
Prime Contract *	001 x	001 x	Select Prime Contract	Select Prime Contract
CO	Select Change Order	Select Change Order	Select Change Order	Select Change Order
WO	Select Work Order	Select Work Order	Select Work Order	Select Work Order
Labor Code	Select Labor Code	Select Labor Code	Select Labor Code	Select Labor Code
Payroll Item *	ST x	OT x	No Selection	No Selection
Workers Comp. Codes	Elec x	Elec x	Select Workman Comp Code	Select Workman Comp Code
Job Cost Code *	03800 x	03800 x	Select Cost Code	Select Cost Code
Billable Status *	Billable x	Billable x	Select Billable Status	Select Billable Status
Hours *	8	1	0	0
Mileage	0	0	0	0
Comments				

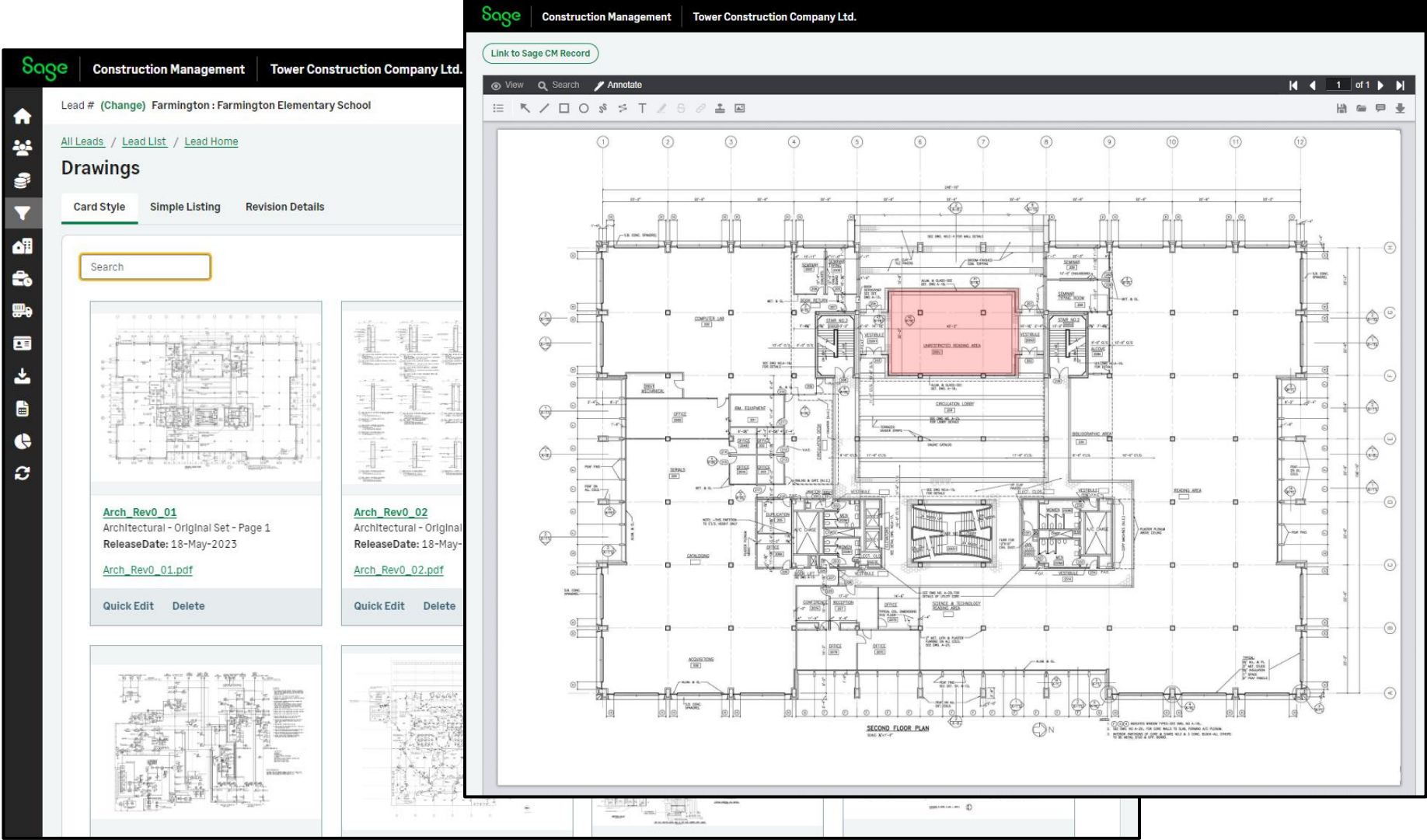
At the bottom of the interface are 'Add & New' and 'Add & Close' buttons. To the right, a mobile app interface is shown with 'My Records' and 'Clock In / Out' tabs. It displays 'My Time' as active, 'Crew Leader: Norman Wendl', and a list of crew members: George Egger and Jack Redmond. There is also an 'Add Employee' button. Below that, 'Crew Equipment' is shown with '01559-200-5250 : Dump Truck, 12 Ton' and an 'Add Equipment' button. A 'Cancel' button is also visible. The mobile app has a bottom navigation bar with Home, Leads, Projects, Search, and Setting icons.

Drawings and Specifications

Organization and communication is key to successful project management and execution especially when it comes to tracking Drawing and Specification revisions.

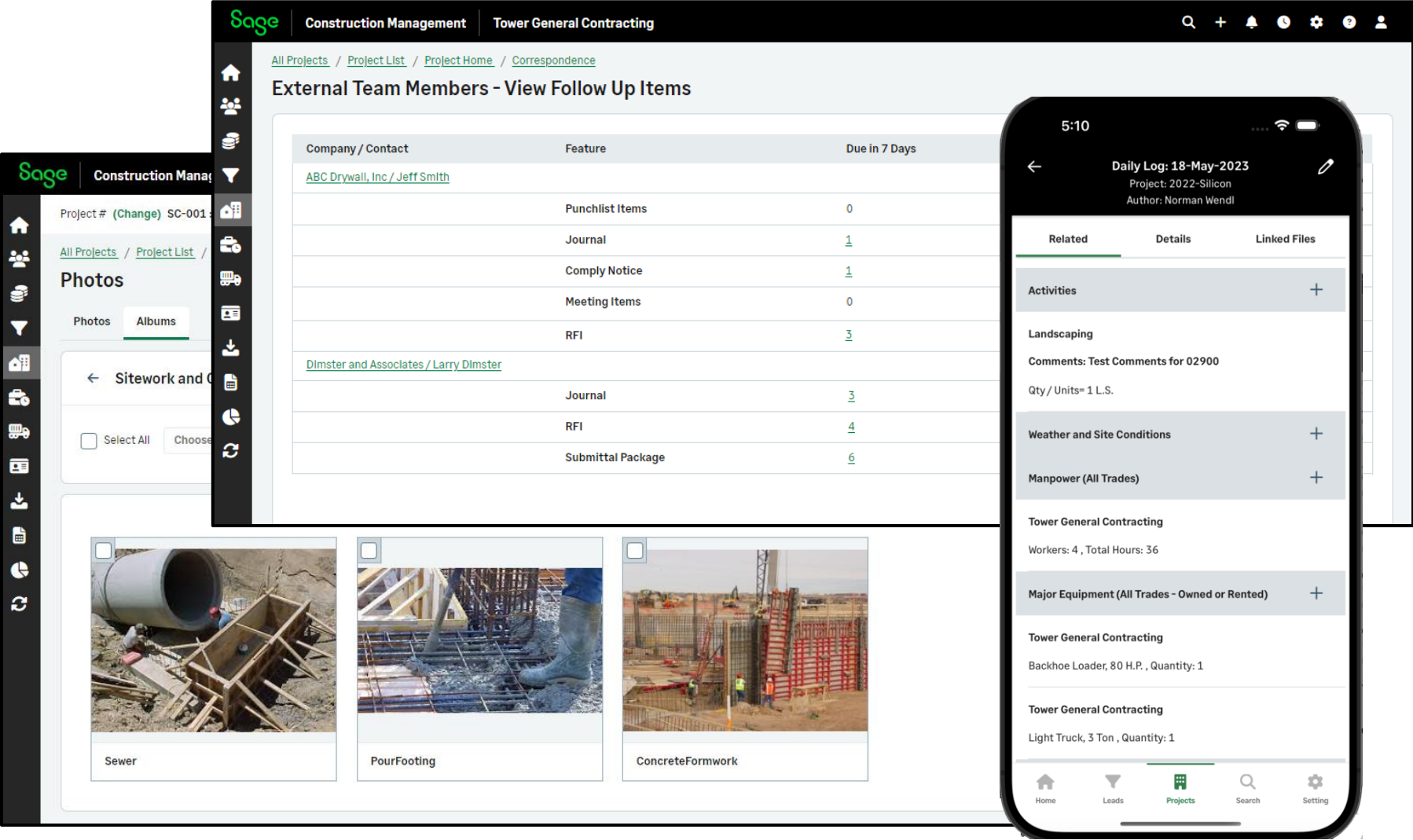
Key Benefits

- Provide one source of truth when it comes to drawings and specs for internal and external team members.
- Use Sage CM's built-in document viewer and advanced markup tool to highlight areas of interest and add notes. Document viewer supports up to 50+ file formats (ex. Images, CAD, PDF) and is available from within Sage CM's browser solution, Mobile Apps, and TeamLink Portal. Thus, team members do not need to download additional applications to collaborate on these types of project documents.



Correspondence and Documentation

- Sage CM offers a comprehensive set of features for Project Correspondence and Documentation which will improve communication and coordination. Being cloud-based, project teams will be able to keep track of this information in one central location which will provide greater access for field staff, executives and external team members via the TeamLink Portal.
- Sage CM's Calendar and Alerts features provide tools to track time sensitive information and communicate to staff when items are overdue or have been responded to by outside team members.
- Correspondence Module:** Issues, Journals (e.g. notes, letters, phone calls), RFIs, Submittals, Transmittals
- Document Module:** Photos, Daily Logs, Meetings, Work Orders



Quality Control (QC) and Safety

Sacrificing quality or safety of construction personnel is not an option. Sage CM's Quality Control (QC) and Safety features prevent mistakes, improve installation times and reduce risk, allowing your firm to grow while maintaining profitability.

QC Highlights

- Create Checklist Templates to ensure quality at every phase (i.e. footings, framing, electrical)
- Send Comply Notices to subcontractors for non-performance issues or potential work disruptions
- Document Inspections and Punchlist Items and distribute them via email to assigned parties

Safety Highlights

- If a Safety Incident occurs, keep track of all the necessary information per government agency requirements such as OSHA.
- Site Superintendents can quickly document Safety Meetings held on the jobsite and who attended.
- Complete Site Hazard Assessments at any time

Construction Management | Tower Construction Company Ltd.

Project # (Change) SC-001 : Silicon Technologies - Tenant Improvement

All Projects / Project List / Project Home

Quality Control (QC) & Safety

QC & Safety Prerequisites

	Total
Project Directory	63
Project Directory without Ins.	20
Project Directory with Exp. Ins.	43

Related Functions

- [QC & Safety Calendar](#)
- [My QC & Safety Items](#)
- [Team Open Items](#)

QC Stats [View My QC & Safety Items](#)

	Total	Closed	Open	Due in > 7 Days	Due in 7 Days	Overdue
Checklist	2	--	--	--	--	--
Checklist Items	182	4	178	0	0	178
Comply Notice	4	2	2	0	0	2
Permits	4	--	--	--	--	--
Punchlist Items	8	0	8	0	0	8
Test/ Inspections	2	--	--	--	--	--

Safety Stats [View My QC & Safety Items](#)

	Total	Closed	Open	Due in > 7 Days	Due in 7 Days	Overdue
Site Hazard Assessments	1	0	1	--	--	--
Applicable Site Hazard Items *	3	0	3	0	0	0
Safety Incidents	2	--	--	--	--	--
Safety Meetings	6	--	--	--	--	--
Safety Meeting Agenda Items	0	0	0	0	0	0

5:11

← Punchlist: 008 Project: SC-001

Related
Details
Linked Files

Project # SC-001

Punchlist Item # 008

Location Room 201

Description

Touch up and caulk around the backsplash of the lavatory top.

Touch up ding in the wall.

Responsible Party and Due Date

Company Tower Construction Company Ltd.

Contact Norman Wendt

Due Date 23-Oct-2023

[Email Punchlist Item to Responsible Company →](#)

Status

Closed No

Closed Date

Home
Leads
Projects
Search
Setting

Scheduling

Many firms find themselves unequipped to implement and utilize scheduling solutions after they pass the proposal phase of a project. Whether it is due to field staff communication gaps or ease-of-use issues, the end result is a missed opportunity for productivity. Sage CM's scheduling features make the process simple, encouraging staff to stay engaged and allowing you to keep close tabs on your timelines.

- Distributed project teams can effectively develop, manage and collaborate on their project tasks from any location using a browser or mobile device.
- Tasks can be assigned to vendors, employees, and equipment resources. Email task notifications to employees and vendors directly from the schedule.
- Tools are available to import a Task List from Microsoft Excel or Microsoft Project.

Project # SC-001 : Silicon Technologies - Tenant Improvement

001: Construction Schedule

Legend: Not Started (Grey), Not Started - Delayed (Red), In Progress (Blue), In Progress - Delayed (Orange), Completed (Green)

ID	Task	Start	Days	End	Comp.	Pred.	Res.
1	Foundation	09-Oct-2023	28	15-Nov-2023	31%		
2	Lot Layout	09-Oct-2023	1	09-Oct-2023	100%		Bill Fredrickson, L
3	Dig	10-Oct-2023	2	11-Oct-2023	100%	2;	Bill Fredrickson, F
4	Footers	12-Oct-2023	5	18-Oct-2023	100%	3;	Bill Fredrickson, F
5	Footer Inspection	19-Oct-2023	1	19-Oct-2023	100%	4;	Bill Fredrickson, F
6	Pour Footer	20-Oct-2023	1	20-Oct-2023	100%	5;	Bill Fredrickson, F
7	Stock Block	23-Oct-2023	1	23-Oct-2023	30%	6;	Bill Fredrickson, F
8	Foundation Pour	24-Oct-2023	7	01-Nov-2023	10%	7;	Bill Fredrickson, F
9	Cure Foundation	02-Nov-2023	7	10-Nov-2023	10%	8;	Bill Fredrickson, F
10	Dampproof Foundation	02-Nov-2023	3	06-Nov-2023	0%	8;	Bill Fredrickson, F
11	Brace Foundation	02-Nov-2023	3	06-Nov-2023	0%	8;	Bill Fredrickson, F
12	Foundation Inspection	07-Nov-2023	1	07-Nov-2023	0%	10;	Bill Fredrickson, F
13	Concrete Flatwork	08-Nov-2023	3	10-Nov-2023	0%	12;	Bill Fredrickson, F
14	Backfill	13-Nov-2023	3	15-Nov-2023	0%	9;	Bill Fredrickson, F
15	Enclosure	16-Nov-2023	21	14-Dec-2023	0%		
16	Framing	16-Nov-2023	10	29-Nov-2023	0%	14;	Bill Fredrickson
17	Construction Manager ...	30-Nov-2023	1	30-Nov-2023	0%	16;	Bill Fredrickson
18	Roofing	01-Dec-2023	4	06-Dec-2023	0%	17;	Bill Fredrickson


Enterprise Grade Reporting

When it comes to reporting, Sage CM offers the most breadth and depth of any cloud-based construction solution on the market. It is enterprise grade right out of the box!

Category	Details	Quantity
Detail Reports	Although Detail Reports are available for all features, they are especially practical for printing out an estimate proposal, subcontract, change order or progress invoice that may have legal language. These reports are based on Microsoft Word templates and data from Sage CM is populated in the document using Bookmarks and Mail Merge Tables.	200 +
Log Reports	Log Reports are column/row style reporting and provide a list of records for an individual project and feature. For example, log reports would be used to export a list of COs, RFIs or Submittals to PDF or Microsoft Excel format.	400 +
Business Intelligence (BI) Dashboards	Business Intelligence (BI) Dashboards provide an executive overview on financial aspects of an awarded project(s) from four different perspectives: cost, contract amount, labor and equipment hours. It is here where transactions from contract administration, procurement and time tracking modules are summarized and compared with estimated budgets providing real-time analysis to maximize the profitability of one's projects.	30 +
Detailed Analytic Reports	In conjunction with BI Summary Dashboards, Detailed Analytic Reports compare actual financials with budgets by cost code, division, division/cost code or owner code. Most of these reports also provide drill-in capabilities to view the underlying transactions.	30 +

Detail Reports

- 200+ Default report templates are in Microsoft Word format and can be easily customized.
- Data is populated in reports via Bookmarks (ex. ProjectNumber) and Mail Merge tables (ex. Estimate Items).
- Each template has a corresponding help topic that lists available bookmarks, mail merge tables and fields.
- Special bookmarks are also available such as inserting the account logo.


Estimate Proposal

Project Information		Estimate Information	
Project #	I	Estimate #	I
Title	I	Description	I
Address	I	Proposal Date	I
City, State, Zip	III	Valid Thru Date	I
Country	I		

From		To	
Contact	I	Contact	I
Company	I	Company	I
Address	I	Address	I
City, State, Zip	III	City, State, Zip	I
Country	I	Country	I
Phone	I	Phone	I
Fax	I	Fax	I

We are pleased to quote the following labor, equipment, and materials in accordance with the plans and specifications listed above. This proposal is subject to exclusions that may be listed below.

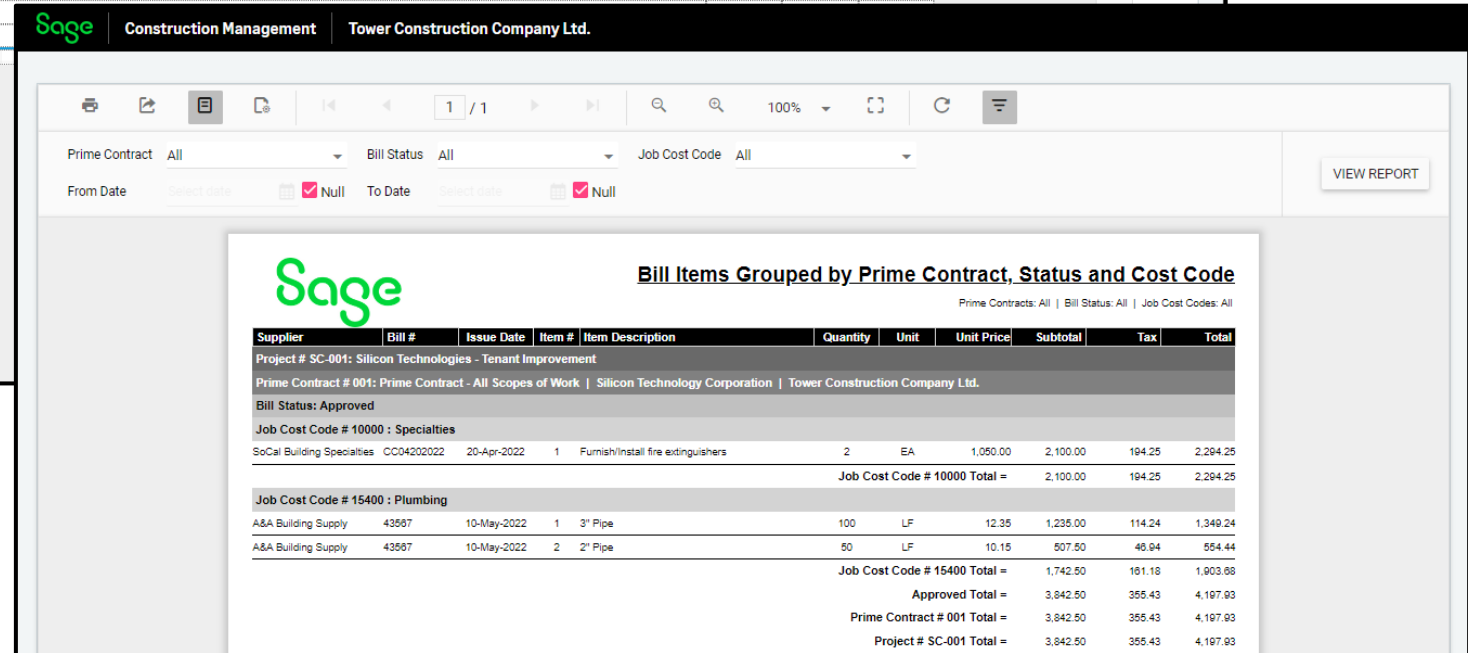
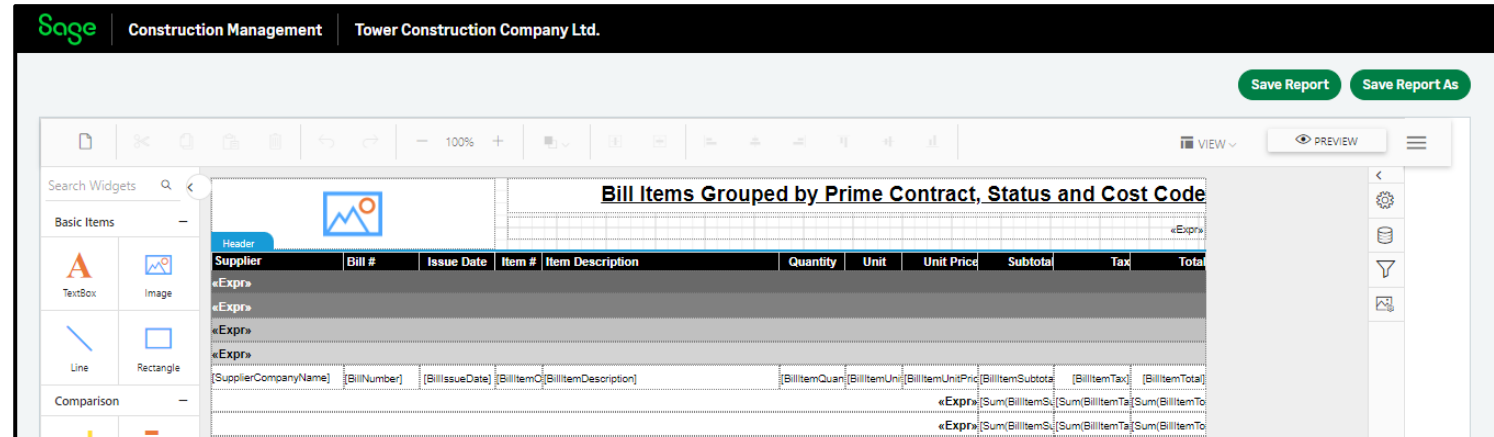
Scope of work for the project to be constructed as depicted in the plans and details as described herein:

01 00 00: General Requirements					Subtotal: 64,589.34
Item #	Description	Quantity	Unit	Unit Price	Total
1	Field office expense, office supplies, average	5	Month	101.844	509.22
2	Field personnel, field engineer, average	24	Week	1,006.247	24,149.93
3	Field personnel, superintendent, average	24	Week	1,540.9958	36,983.90
4	Office trailer, furnished, no hookups, 20' x 8', rent per month	1	Ea.	186.30	186.30
5	Superintendent	6	week	459.9983	2,759.99

31 00 00: Earthwork					Subtotal: 274,346.40
Item #	Description	Quantity	Unit	Unit Price	Total
6	Asphaltic concrete pavement, paving, bind	8,530	S.Y.	7.6764	65,480.36
7	Asphaltic concrete pavement, paving, wear	8,530	S.Y.	4.2089	35,902.76
8	Backfill by hand, no compaction, light so	30	C.Y.	11.4986	344.96
9	Backfill trench, f.e.loader, wheel mtd.,	287	C.Y.	0.7235	207.67
10	Backfill, dozer, footings & spread excess	390	C.Y.	0.3213	125.31

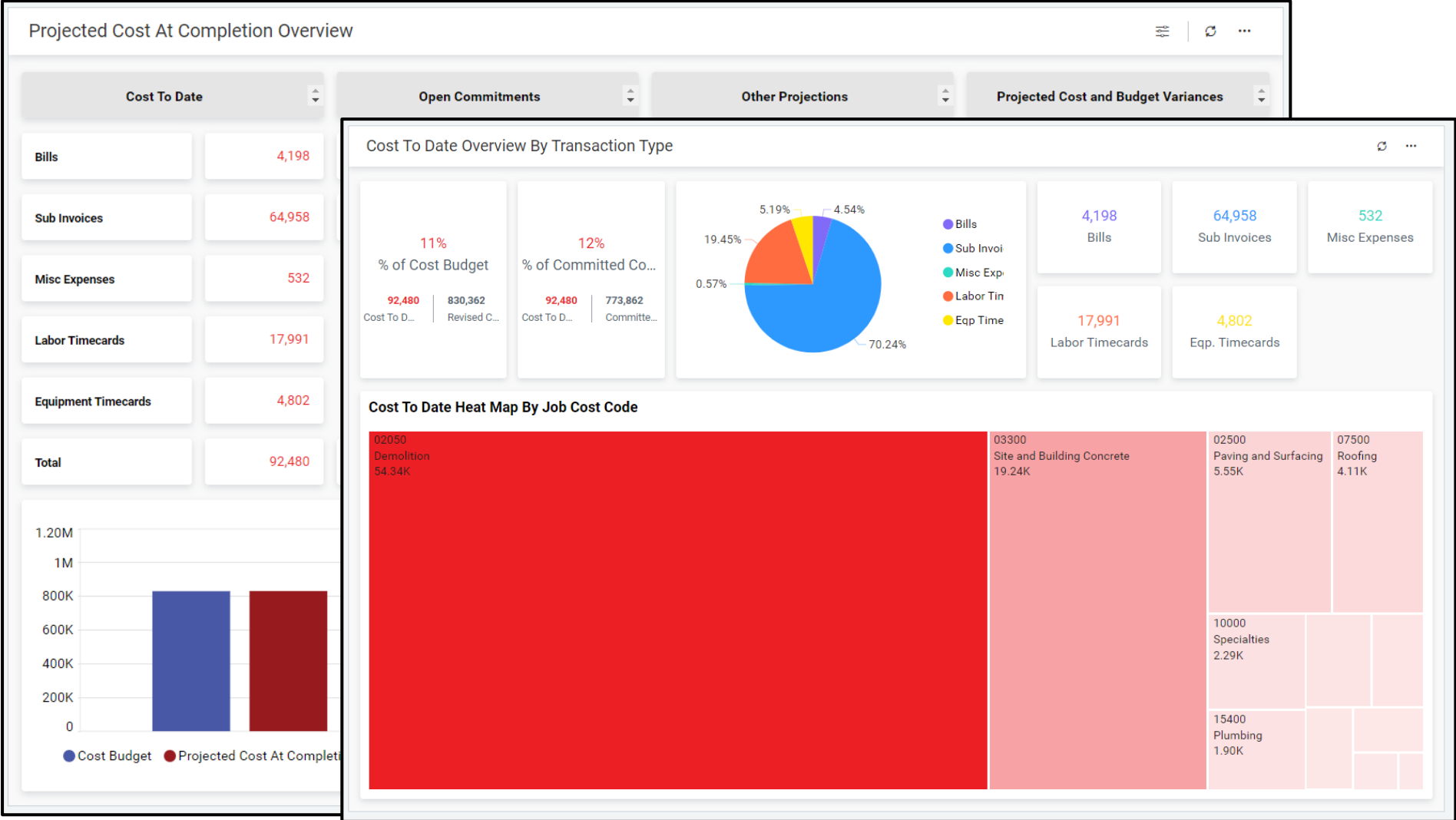
Log Reports

- Default log reports (400+) are available for every feature that can be copied and easily customized.
- 160 Data Views providing access to all contact, lead and project information.
- Enterprise grade report designer providing unlimited possibilities when it comes to selecting data, filtering, grouping and presentation widgets.
- Export options
 - PDF
 - Microsoft Excel
 - Microsoft Word
 - HTML
 - Microsoft PowerPoint
 - CSV
 - XML



Business Intelligence (BI) Dashboards

- Standard BI Dashboards (30+) can analyze Cost, Revenue, Labor and Equipment Hours for Single or Multi-Projects.
- Specialty BI Dashboards such as Work-In-Progress (WIP) or Cost Plus Billable Status are also available.
- Like other reporting features, dashboards can be copied and customized.
- Dashboard bar charts, heat maps and grids can act as filters and be exported separately to Excel.



Detailed Analytic Reports

- Standard Detailed Analytic Reports (30+) summarize Cost, Revenue, Labor and Equipment Hours by the following methods.
 - Project and Prime Contract
 - Job Cost Code
 - Division Code
 - Division and Job Cost Code
 - Owner Code
- Most Detailed Analytic Reports include drill-in capabilities to view underlying budgets and transaction details and are pixel perfect when exporting to PDF or printing.

Sage Construction Management

Optional Date Filter for P
Selected Project(s)/ Prim

Favorites Overview Revenue

Summary Dashboards

Analytical Reports

Sum By Job Cost Code Sum

Report Name

- [Cash Flow Analysis](#)
- [Cost Plus Billable Status By Transacti](#)
- [Cost Plus Billable Status Overview](#)
- [Cost Plus Project Status For Client Review](#)
- [Estimated Cost To Complete Using Field Percent Complete And Cash Flow Overview](#)
- [Revenue Overview](#)
- [Revised Contract and Projected Cost Overview](#)
- [Revised Contract and Projected Cost Overview Without Tax](#)
- [Unit Price Contract Earned Revenue Analysis](#)

Budget Variance All Include Pending Transactions True False VIEW REPORT

Sage Analytics - Revenue Overview
Sum By: Job Cost Code | Budget Variance: All | Include Pending Transactions: No

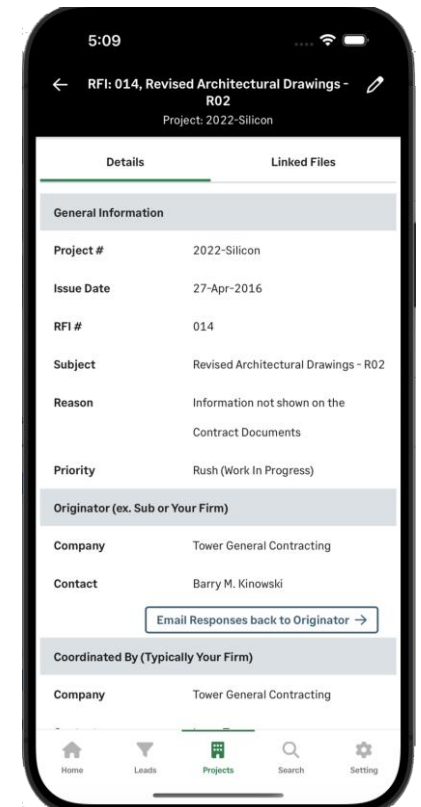
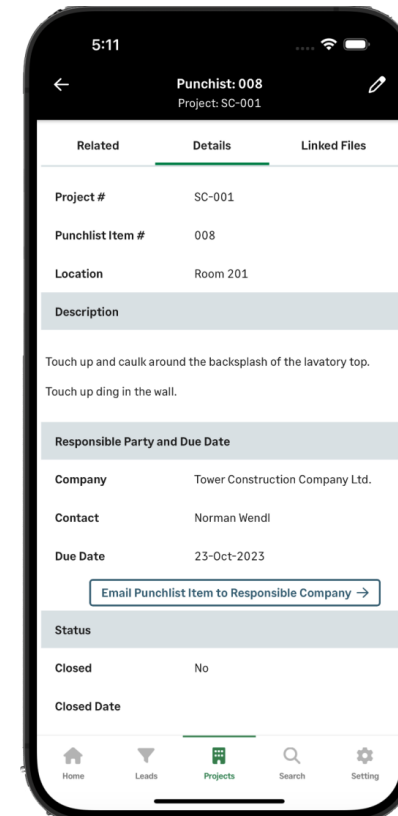
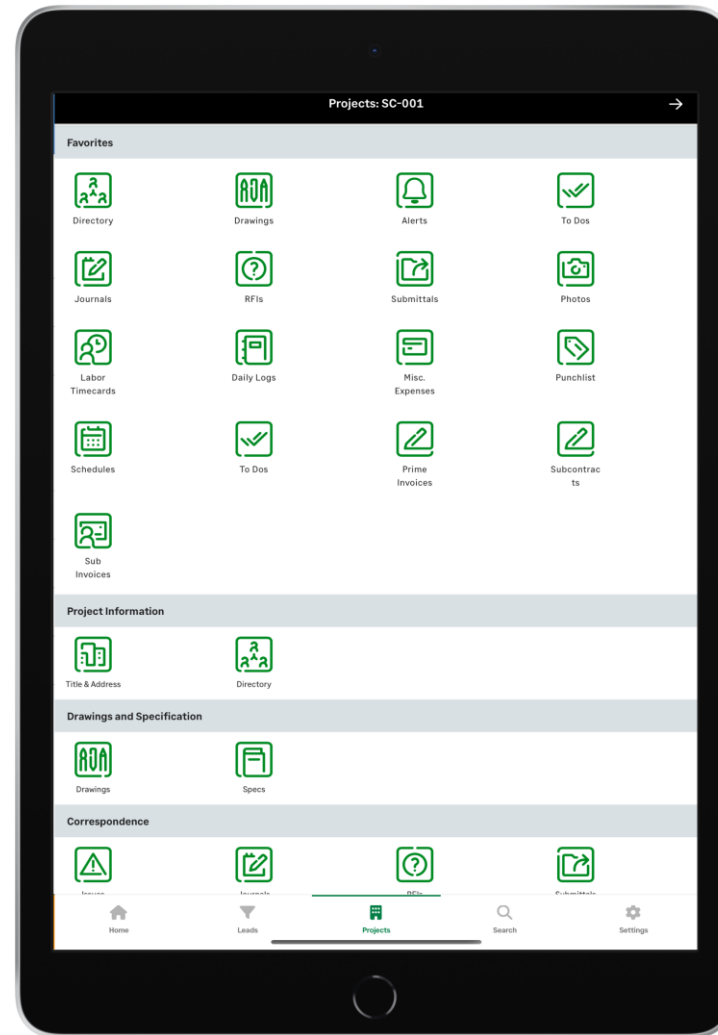
Job Cost Code	Revised Prime Contract Total			Gross Invoice Totals			Retainage Totals			Net Prime Invoice Totals			
	Prime Contract	Approved COs	Revised Contract	Prime Contract	Approved COs	Total	Retainage	Billed	Net Retainage	Subtotal	Tax	Total	% of Budget
Project # SC-001: Silicon Technologies - Tenant Improvement													
Prime Contract # 001: Prime Contract - All Scopes of Work Silicon Technology Corporation Tower Construction Company Ltd.													
01001 : Miscellaneous Items	1,500.00	447.76	1,947.76	1,500.00	0.00	1,500.00	150.00	0.00	150.00	1,350.00	47.70	1,397.70	71.8%
01002 : Clean-up / Misc. Labor	4,046.00	0.00	4,046.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
01003 : Liability Insurance	6,534.00	766.45	7,300.45	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
01004 : Budget Contingency	13,000.00	0.00	13,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
01005 : General Conditions	25,000.00	8,221.54	33,221.54	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
01006 : Fee	37,853.00	5,277.92	43,130.92	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
02050 : Demolition	57,000.00	0.00	57,000.00	57,000.00	0.00	57,000.00	5,700.00	0.00	5,700.00	51,300.00	1,545.75	52,845.75	92.7%
02500 : Paving and Surfacing	7,803.00	0.00	7,803.00	5,852.25	0.00	5,852.25	585.22	0.00	585.22	5,267.03	86.95	5,353.98	68.6%
02830 : Fencing and Gates	2,765.00	(2,765.00)	0.00	600.00	0.00	600.00	60.00	0.00	60.00	540.00	0.00	540.00	100.0%
02900 : Landscaping	2,500.00	400.00	2,900.00	1,875.00	0.00	1,875.00	187.50	0.00	187.50	1,687.50	53.32	1,740.82	60.0%

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.



TeamLink Portal for Collaboration

Sage CM's TeamLink Portal was built from the ground up to connect "your" business with external team members.

- Free unlimited logins for outside team members such as architects, clients, consultants, and vendors!
- TeamLink Security Roles provide granular access rights for each project and company.
- Real-time updates from Sage CM's browser and Mobile Apps will immediately appear in the TeamLink Portal.
- Examples of outside team members using TeamLink Portal
 - Architect responding to RFI or Submittal
 - Vendor providing pricing on RFP Package or potential change (CPR)
 - Subcontractors submitting draft progress invoices
- Auto alerts are sent via email when any type of response has been posted in the portal.

The screenshot displays the TeamLink Portal interface for Tower Construction Company Ltd. The main content area shows project information for 'Projects: SC-001: Silicon Technologies - Tenant Improvement'. The 'Project Information' section includes a summary, address (1011 Barranca, Irvine, CA 92609), and project description. Below this, there are tabs for 'Quick Links', 'Alerts', 'Drawings & Specs.', 'Photos', 'Open Items', and 'Financials'. The 'Financials' tab is active, showing a 'Financial Summary' table and two bar charts.

Project Information Summary:

- Address: 1011 Barranca, Irvine, CA 92609
- PM Contact: Fred K. Alden (877) 437-7765, E: testemail1@corecon.com
- Project Description: High-tech, fast track tenant improvement project. Project financing provided by Washington Mutual, San Juan Capistrano.

Financial Summary Table:

	Total	Approved	Pending	Payments	Current Retainage Held
Subcontracts	\$26,475.00	\$26,475.00	--	--	--
Sub Invoices	\$21,375.00	\$21,375.00	\$0.00	\$0.00	\$2,137.50

Pending and Approved Transaction Value Chart:

Category	Pending	Approved
Subcontracts	\$0	\$26,475.00
Sub Invoices	\$0	\$21,375.00

Approved Transaction vs Payment Status Chart:

Category	Approved	Payment
Sub Invoices	\$21,375.00	\$0.00

The interface also includes a 'Preconstruction' section with a filter set to 'All' and a list of items: Drawings (12), Specifications (1), and Work Orders (1). A 'Correspondence' section shows a status filter set to 'All' and a list of items: Issues (2), Journals (1), RFIs (0), and Submittals (0).

Accounting Links

Maintain data consistency and avoid duplicate work

Connect Sage Construction Management with accounting/ERP solutions:

- ✓ Intuit QuickBooks Pro, Premier, Enterprise (US, Canada, UK)
- ✓ Intuit QuickBooks Online (US, International)
- ✓ Xero (Global)
- ✓ Sage 50 (Canada)
- ✓ Sage Intacct (**Most Robust**)

Coming May 2024:

- + Sage 100 Contractor
- + Sage 300 Construction & Real-Estate

