

Sage Construction Management – TeamLink Portal Overview

November 2023



Sage

Built for Collaboration & Mobility



Browser Solution



Mobile App
Android/iOS

Anytime, anywhere access



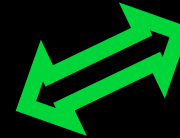
External project team members
(portal for customers, vendors, subs.)

TeamLink Portal



Finance team members
(streamlined workflow & collaboration)

Accounting Links



Sage CM – TeamLink Portal Settings

The **TeamLink Portal url** shown in Sage CM's Settings area will be used by all external project team members. This url can also be used on a corporate website to provide clients, architects, and subcontractors easy access to lead and project information.

Default TeamLink Security Roles:

Sage CM's includes three default security roles (eg. Architect, Owner, Vendor) which can be copied to create custom roles.

TeamLink Portal Settings

Login URL * <https://teamlink.sagecm.corecon.com/Login?Id=dnZLbTBkRm5yWlFBS0Z3OD>

TeamLink Usage in Last 30 Days

TeamLink Usage in Last 30 Days

Date	One Time Login	Username / Password Authentication
26-Oct-2023	0	0
27-Oct-2023	0	0
28-Oct-2023	0	0
29-Oct-2023	0	0
30-Oct-2023	0	0
31-Oct-2023	0	1
01-Nov-2023	13	0
02-Nov-2023	0	0
03-Nov-2023	0	0
04-Nov-2023	0	0
05-Nov-2023	0	0
06-Nov-2023	0	0
07-Nov-2023	14	0
08-Nov-2023	0	0
09-Nov-2023	0	0
10-Nov-2023	12	0
11-Nov-2023	0	12
12-Nov-2023	0	0
13-Nov-2023	0	11
14-Nov-2023	0	0
15-Nov-2023	11	0
16-Nov-2023	0	0
17-Nov-2023	0	0
18-Nov-2023	0	0
19-Nov-2023	0	0
20-Nov-2023	0	12
21-Nov-2023	0	0
22-Nov-2023	0	0
23-Nov-2023	0	0
24-Nov-2023	0	0
25-Nov-2023	0	12

TeamLink Security Roles Add

Search

Role Name	Action
Architect	
Owner	
Vendor	

Total No. Of Row(s) : 3

Creating Custom TeamLink Security Roles

Unlimited custom TeamLink Portal security roles can be created in Settings.

Add Custom Teamlink Portal Role

Role Name *

Select the Features and Permissions that for this role

Feature	Allow Read	Read Access Type	Allow Add **
<input checked="" type="checkbox"/> Project Directory	<input checked="" type="checkbox"/>	Referenced Only	
<input checked="" type="checkbox"/> Drawings	<input checked="" type="checkbox"/>	All	
<input checked="" type="checkbox"/> Specifications	<input checked="" type="checkbox"/>	All	
<input type="checkbox"/> ITB Vendor	<input type="checkbox"/>	No Selection	
<input checked="" type="checkbox"/> Issues	<input checked="" type="checkbox"/>	Referenced Only	
<input checked="" type="checkbox"/> Journals	<input checked="" type="checkbox"/>	Referenced Only	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> RFIs	<input checked="" type="checkbox"/>	Referenced Only	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Submittals	<input checked="" type="checkbox"/>	Referenced Only	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Transmittals	<input checked="" type="checkbox"/>	Referenced Only	
<input checked="" type="checkbox"/> Photos	<input checked="" type="checkbox"/>	All	
<input type="checkbox"/> Daily Logs	<input type="checkbox"/>	No Selection	
<input type="checkbox"/> Meetings	<input type="checkbox"/>	No Selection	
<input type="checkbox"/> Work Orders	<input type="checkbox"/>	No Selection	
<input type="checkbox"/> Comply Notices	<input type="checkbox"/>	No Selection	
<input type="checkbox"/> Permits	<input type="checkbox"/>	No Selection	
<input checked="" type="checkbox"/> Punchlist Items	<input checked="" type="checkbox"/>	Referenced Only	
<input type="checkbox"/> Safety Accidents	<input type="checkbox"/>	No Selection	
<input checked="" type="checkbox"/> Test / Inspections	<input checked="" type="checkbox"/>	Referenced Only	

Buttons: Cancel, Save, Save & Close

Feature Access Permissions:

- **No Access:** No project records will be shown in the portal regardless if the external team member company is referenced.
- **All:** All project records will be listed whether the external team member company is referenced on them or not.
- **Referenced Only:** Only records that reference the external team member company will be listed. Edits may be allowed depending on the feature and if the company is marked as a respondent.

Assigning TeamLink Roles in Sage CM

The screenshot shows the Sage CM Project Directory interface for the project "2023-Kramer : Kramer Residence - New Construction". The interface includes a search bar, filter options (All, Expired Insurance, Without Insurance), and a table of companies. The "TeamLink Role" column is highlighted with a green box. A dropdown menu is open for the "Irvine" row, showing the "Send TeamLink Invitation" option highlighted with a green box. The "Actions" button in the top right is also highlighted with a green box.

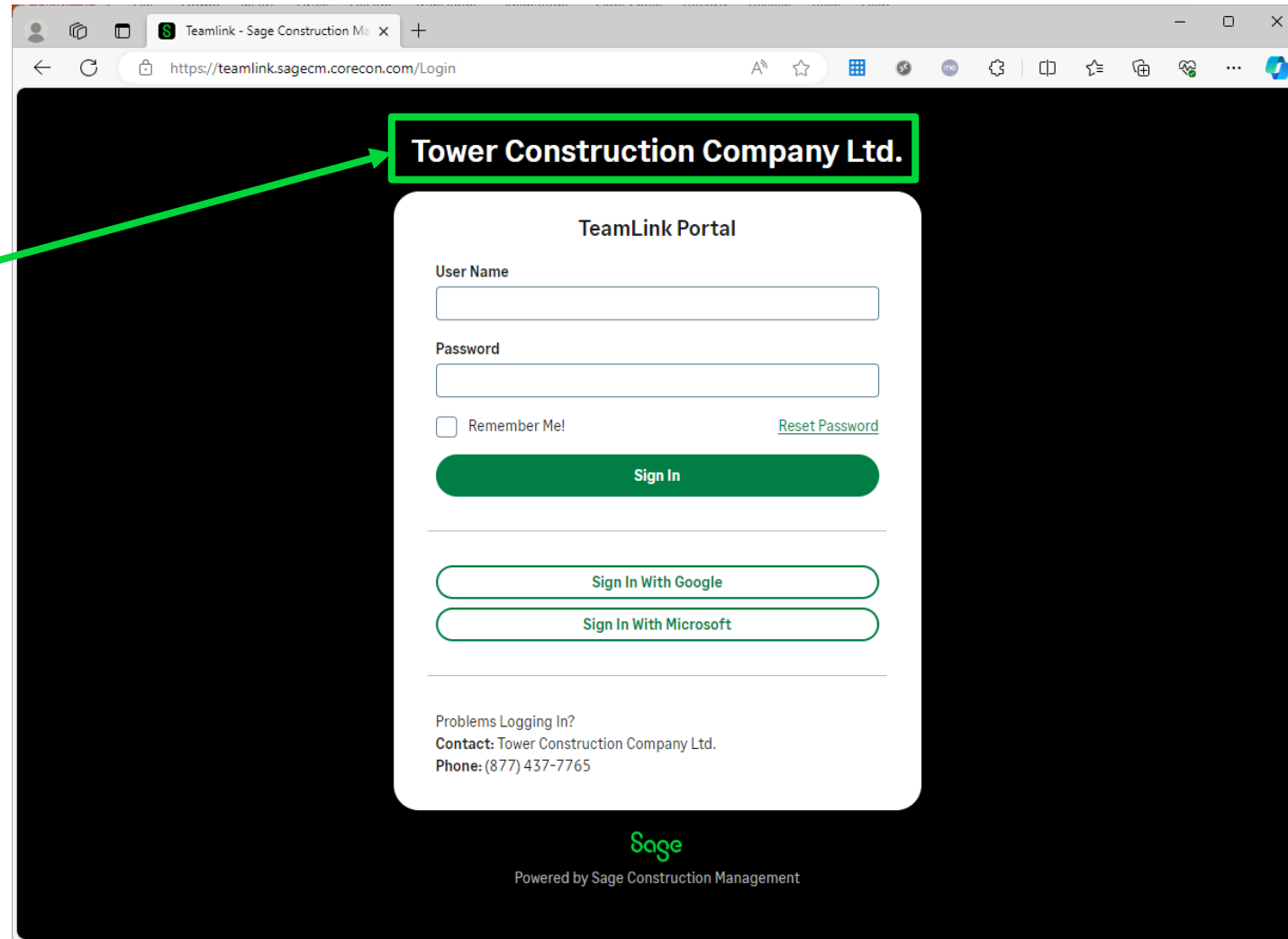
Company Name	TeamLink Role	Ship City	Ship St	Phone	More
A&A Building Supply		Fresno	CA		
Ball Contracting	Vendor	Santa Ana	CA		
Bern Woodworking	Vendor	Oakbrook	IL	(847) 843-9000	...
Dimster & Associates	Architect	Irvine	CA	(949) 955-5659	...
Kramer, Jack and Laurie	Owner	HB	CA	(714) 222-3333	...
Morris Mechanical Corporation	Vendor	Walnut	CA	(714) 598-8799	...
O'Reilly Plumbing		Irvine	CA	(929) 980-1003	...
Tower Construction Company Ltd.		San Jose	CA	(877) 437-7765	...

Email external team members their login credentials after security role has been assigned.

TeamLink Security Roles are assigned on the Project Directory. Thus, a company involved on multiple projects could be assigned different roles for each project.

TeamLink Portal Login Page

The TeamLink Login Page will automatically show your company name so no additional customization is required!



The screenshot shows a web browser window with the URL <https://teamlink.sagecm.corecon.com/Login>. The page title is "TeamLink Portal" and the company name "Tower Construction Company Ltd." is displayed at the top of the login form, highlighted with a red box. The login form includes fields for "User Name" and "Password", a "Remember Me" checkbox, a "Reset Password" link, and a "Sign In" button. Below the form are buttons for "Sign In With Google" and "Sign In With Microsoft". At the bottom of the form, there is a section for "Problems Logging In?" with contact information: "Contact: Tower Construction Company Ltd." and "Phone: (877) 437-7765". The Sage logo and "Powered by Sage Construction Management" are visible at the bottom of the page.

TeamLink Portal Active Project Listing

Project Access:

Upon logging into the portal, external team members will see a list of active projects that meet the following criteria.

- Project is marked active in Sage CM.
- External team member is referenced in Project Directory and assigned a TeamLink Security Role.

Tower Construction Company Ltd. TeamLink Portal

Active Project List

Search

Project #	Project Title	Address	Map	Weather
2023-HB Townhomes	HB Townhomes - 2 Buildings - 4 Total Units	1200 Wall St. Suite 102, NY, NY - 10027 United States	Map	Weather
2023-Kramer	Kramer Residence - New Construction	123 Main St, HB, CA - 92649	Map	Weather

TeamLink Portal Current Project View

Project information tabs will appear depending on the assigned TeamLink Security Role.

- **Quick Links:** Features and record stats
- **Alerts:** Items requiring external team members immediate attention
- **Photos:** Albums and related progress photos
- **Drawings & Specifications**
- **Open Items:** RFIs, Submittals etc. that are open and may have a due date.
- **Financials:** Owner or Vendor Financials Dashboard

The screenshot displays the 'TeamLink Portal' interface for 'Tower Construction Company Ltd.'. The top navigation bar shows the company name and 'TeamLink Portal'. A sidebar on the left contains icons for home, notifications, and user profile. The main content area is titled 'Selected Project' and shows 'Projects: SC-001: Silicon Technology - Lab Retrofit'. Below this is a 'Project List' link and a 'Project Information' section. The 'Project Information' section includes a 'Summary' tab and a table with the following details:

Address	1011 Barranca, Irvine, CA 92609 Map Weather	PM Contact	Fred K. Alden O: (877) 437-7765 E: testemail+1@corecon.com
Project Description	High-tech, fast track tenant improvement project. Project financing provided by Washington Mutual, San Juan Capistrano.		

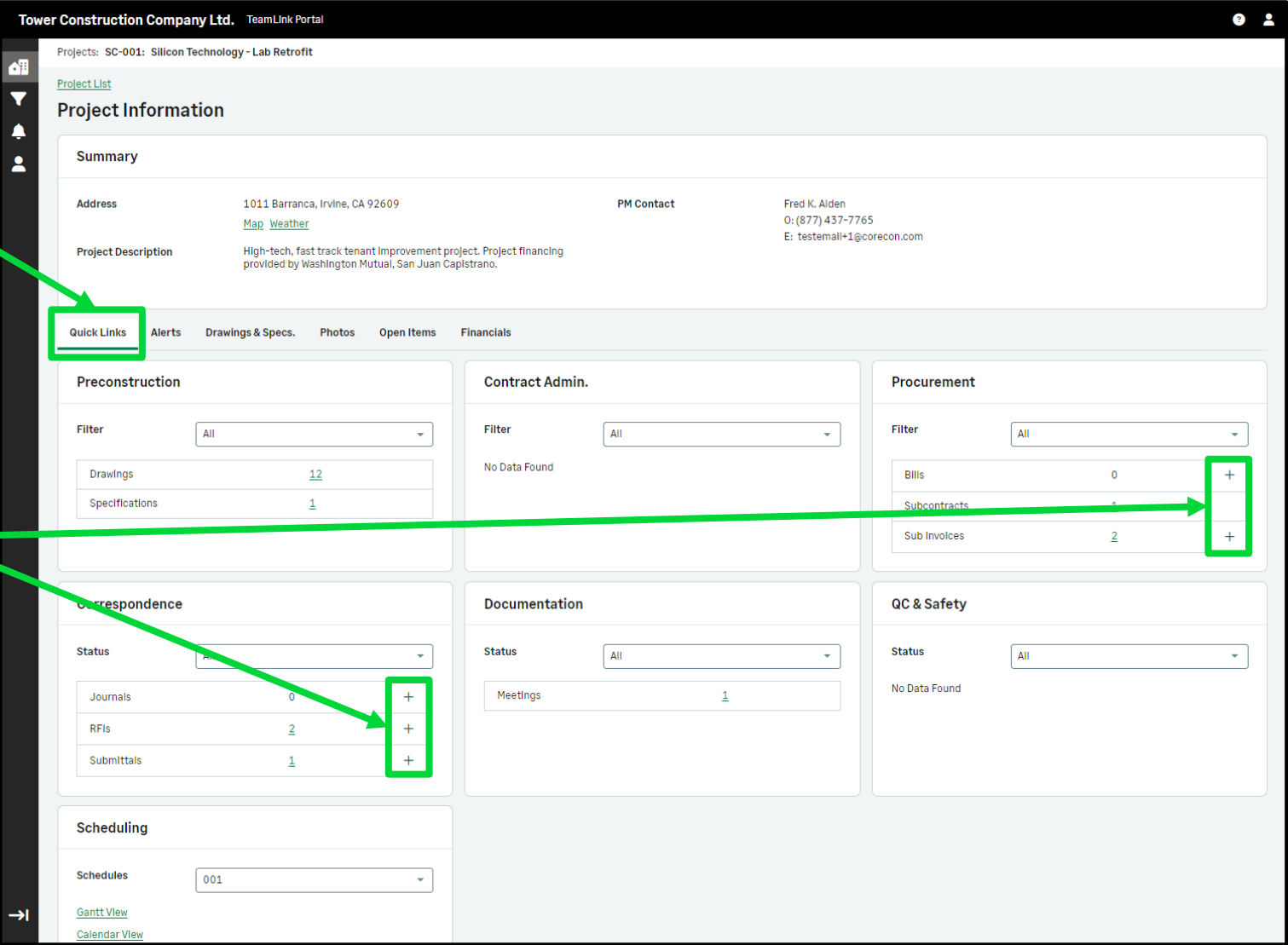
Below the project information is a horizontal menu with tabs: 'Quick Links', 'Alerts', 'Drawings & Specs.', 'Photos', 'Open Items', and 'Financials'. The 'Photos' tab is currently selected. Below the tabs is a 'Photos' section with a 'Download All' button. A search bar is present with a dropdown menu set to 'Sitework and Concrete'. Three photo thumbnails are displayed with captions: 'PourFooting', 'Sewer', and 'ConcreteFormwork'.

TeamLink Portal Current Project – Quick Links Tab

The **Quick Links** tab will dynamically show Features and Record Stats based on the assigned TeamLink Security Role and if the external team member's firm has been referenced on the document. Thus, architects, clients, and vendors may see different modules and record count links within this area.

All external team members can initiate project correspondence. In addition, vendors who have been issued a PO or Subcontract can create Bills or Sub Invoices * respectively.

* Add Sub Invoice Wizard is shown on next page.



TeamLink Portal Current Project – Add Sub Invoice

Eliminate data entry by having your subcontractors enter their own invoice!

The TeamLink Portal's Sub Invoice Add Wizard will dynamically adjust if the subcontract type is fixed lump sum, cost plus or unit price and will guide the subcontractor thru the process so mistakes don't happen. A copy of the invoice generated from the sub's accounting system can also be uploaded.

Once this is complete, an email alert will be generated to your project manager or financial admin to review this pending invoice back in Sage CM.

Tower Construction Company Ltd. TeamLink Portal

Projects: SC-001: Silicon Technology - Lab Retrofit

[Project List](#) / [Project Detail](#)

Add Subcontract Invoice Wizard - Add Original Subcontract Items

Stika Concrete , Ray L. Stika

Sub Invoice # 78545 Order # 3

Project # SC-001

Prime Contract # 001

Subcontract # 012

Unbilled Subcontract Original Items - (Schedule of Values)

Issue Credit

<input checked="" type="checkbox"/>	Item #	Description	Value	Prev. Invoices	Current Work	Current Stored	Current Total	Cost Code	Prev. % Complete	% Complete
<input checked="" type="checkbox"/>	1	Site and Building Concrete	\$25,500.00	\$20,400.00	\$ 2550	\$ 0	\$2,550.00	03300	80.00%	90

Cancel Skip Save & Next

TeamLink Portal Current Project – Financials Tab

Owners and Vendors who login to the portal will see a Financials tab on the Current Project Home View which will include a specific dashboard depending on their assigned TeamLink Security Role.

Dashboard Shown: Vendor Financials

The screenshot shows the 'Financials' tab in the TeamLink Portal. The page title is 'Tower Construction Company Ltd. TeamLink Portal'. The project name is 'Projects: SC-001: Silicon Technology - Lab Retrofit'. The 'Project Information' section includes a 'Summary' with address (1011 Barranca, Irvine, CA 92609), PM Contact (Fred K. Alden), and project description (High-tech, fast track tenant improvement project). Below this is a navigation bar with tabs: Quick Links, Alerts, Drawings & Specs., Photos, Open Items, and Financials (highlighted with a green box). The 'Stika Concrete' vendor information is shown, including ship and bill addresses and phone number. The 'Insurance & License Information' table shows zero values for insurance and license. The 'Financial Summary' table provides a breakdown of subcontracts and subinvoices. Two bar charts at the bottom show transaction values for pending and approved items.

	Total	Expired
Insurance	0	0
License	0	0

	Total	Approved	Pending	Payments	Current Retainage Held
Subcontracts	\$26,475.00	\$26,475.00	--	--	--
Sub Invoices	\$23,925.00	\$21,375.00	\$2,550.00	\$0.00	\$2,392.50

TeamLink Portal Current Project – Drawings & Specs

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

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, Mobile Apps, and TeamLink Portal. Thus, team members do not need to download additional applications to collaborate on these types of project documents.

The screenshot displays the TeamLink Portal interface for 'Tower Construction Company Ltd.' The main content area shows project information for 'Projects: SC-001: Silicon Technology - Lab Retrofit'. A sidebar on the left contains navigation options: 'Project List', 'Project Information', 'Quick Links', 'Alerts', 'Drawings & Specs.' (highlighted with a green box), and 'Photos'. Below the sidebar, there is a 'Drawings' section with a search bar and a table of drawing entries.

Drawing #	Title	Created	Category	Link
Arch_Rev0_01	Architectural - Original			
Arch_Rev0_02	Architectural - Original			
Arch_Rev0_03	Architectural - Original			
Elec_Rev0_01	Electrical - Original Set - Page 1	18-May-2023	Electrical	Elec_Rev0_01.pdf
Elec_Rev0_02	Electrical - Original Set - Page 2	18-May-2023	Electrical	Elec_Rev0_02.pdf
Elec_Rev0_03	Electrical - Original Set - Page 3	18-May-2023	Electrical	Elec_Rev0_03.pdf

The right side of the screenshot shows a detailed architectural drawing of a 'SECOND FLOOR PLAN' for a 'LABORATORY'. The drawing includes various rooms such as 'COMPUTER LAB', 'SERVER ROOM', 'LABORATORY', and 'RESTROOM'. A red rectangular area is highlighted on the drawing, indicating a specific region of interest. The drawing is viewed in a software application with a toolbar at the top and a zoom level of 30%.

Example Project Record in TeamLink Portal

Many aspects of the TeamLink Portal are for review only. However, there can be scenarios where a response is required such as an architect responding to an RFI or a vendor submitting pricing on a bid package or potential change. In those scenarios, external team members can respond in the appropriate manner and upload related files such as PDFs or images.

The screenshot displays the 'Request For Information (RFI) Details' page in the TeamLink Portal. The page is divided into several sections:

- RFI # 003 , Concrete Rating**
- Status Summary ***: Open , Earliest Overdue by 219 Days , Schedule Impact : TBD , F
- Project**: SC-001 - Silicon Technology - Lab Retrofit
- General Information**
 - Issue Date**: 05-Apr-2023
 - Type**: Specifications Clarification
 - Reason**: Information not shown on the Contract Documents
 - Priority**: A.S.A.P. *
- Originator**
 - Contact Name**: Raymond S. Stika, Stika Concrete
 - Company Phone**: (310) 875-1090
 - Mobile Phone**: --
 - Email**: raymondstika@stikaconcrete.com
- Coordinated By**
 - Contact Name**: John L. Tower, Tower Construction Company Ltd.
 - Company Phone**: (877) 437-7765
 - Mobile Phone**: --
 - Email**: jtower@something.netx

At the bottom of the RFI details, there are links for **Request** and **References**.

Overlaid on the right is a 'Respondents' window, which contains:

- A search bar.
- A table with columns: Company Name, Contact Name, Email, Due Date, and Responded Date.
- A single row of data: Dimster & Associates, Larry Dimster, [redacted], 20-Apr-2023, 30-Apr-2023.
- A rich text editor for the response, containing the text: "Ready mixed concrete shall be mixed and delivered in accordance with 'Standard Specification for Ready Mixed Concrete (ASTM C94 - latest edition). Mixing and transporting equipment shall be capable of providing concrete which meets the ASTM C94 requirements for uniformity.'"
- A 'Save' button.
- A section for 'CC Recipients' with a search bar and a table showing 'No Data Found'.
- A section for 'Files Uploaded in the TeamLink Portal by Respondents' with a search bar, a 'Drop files here' button, and an 'Add' button.

Green arrows point from the text on the left to the response text in the 'Respondents' window and to the 'Files Uploaded' section.

Information Shown in Portal Based On Default Role

Sage CM Feature	Owner	Architect	Vendor	Add Option in Portal
Project General Information				
Project Directory	No Access			
Drawings	All – Read Only			
Specifications				
Correspondence				
Journal (e.g. Notes, Phone Calls etc.)	Referenced – Read/Edit			Yes
RFIs				Yes
Submittals				Yes
Transmittals				
Documentation				
Photo Albums and Corresponding Images	All Albums with ‘Show In Portal’ Checked			
Meeting Minutes	Referenced – Read Only			
Work Orders				
Scheduling				
Scheduling Tasks (Gantt Chart_	All – Read Only		Referenced – Read Only	Yes - Task Comments

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Referenced: Only project records that reference the external team member will be listed. Edits may be allowed depending on the feature and if the company is marked as a respondent.

Information Shown in Portal Based On Default Role

Sage CM Feature	Owner	Architect	Vendor	Add Option in Portal	
Quality Control (QC) and Safety					
Comply Notice	Referenced – Read Only		Referenced – Read/Edit		
Permits	All – Read Only	No Access	Referenced – Read Only		
Punchlist		Referenced – Read Only	Referenced – Read/Edit		
Test and Inspections			Referenced – Read Only		
Vendor Financials					
RFP Packages	No Access	Referenced – Read Only	Referenced – Read/Edit		
Approved POs		No Access	Referenced – Read Only		
Pending Bills			Referenced – Read/Edit (If vendor created transaction.)	Yes – If Vendor was issued PO.	
Approved Bills			Referenced – Read Only		
Approved Subcontracts					
Approved SCOs					
Pending Sub Invoices				Referenced – Read/Edit (If Sub created transaction.)	Yes – If Sub was issued Subcontract.
Approved Sub Invoices				Referenced – Read Only	

ALL: All project records will be shown regardless of whether the external team member is referenced on them or not.

No Access: No project records will be shown.

Referenced: Only project records that reference the external team member will be listed. Edits may be allowed depending on the feature and if the company is marked as a respondent.

Information Shown in Portal Based On Default Role

Sage CM Feature	Owner	Architect	Vendor	Add Option in Portal
Vendor Financials (continued)				
Vendor Financial Dashboard	No Access	No Access	Referenced – Read Only	
Owner Financials				
Approved Prime Contracts	Referenced – Read Only	Only if referenced on Prime Contract	No Access	
Allowance Packages	Referenced – Read/Edit			
Approved Change Proposal Request (CPR)	Referenced – Read Only			
Approved Change Order (CO)				
Approved Prime Contract Invoices				
Owner Financial Dashboard				

All: All project records will be shown regardless of whether the external team member is referenced on them or not.

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