



# Sage Construction Management

Streamline your construction operations, from pre-construction to project management to finance

Sage Construction Management enables you to align your finance and operations data to win more business and execute projects more efficiently. Manage all your project operations from one platform, anytime, from anywhere, and on any device. Built for collaboration and mobility, Sage Construction Management gives you the power to make quick and informed decisions with real-time project information, share relevant information as needed with external team members, and integrate with accounting solutions such as Xero, QuickBooks, Sage, and others.

## **Organize your Leads**

With Sage Construction Management you can easily view and organize your leads and estimates, document and track leads, prepare invitations to bid, upload drawings and specifications, and prepare RFP packages. Categorize leads any way you want to fit your process and utilize customizable dashboards and reports to gain better insights into job opportunities and bid status.

Sage



### **Streamline Estimating Process**

Create estimates from scratch, from imported spreadsheets, or from previous estimates. Multiple estimators can work on the same estimate at the same time, or you can create multiple estimates to save your revisions and easily organize them into different categories. Attach documents, add markups, and integrate RFP packages with ease. You can also move drawings, specifications, correspondence, and more, directly to the project once awarded.

### **Set Up and Organize Your Contracts**

Set up job cost codes, client and prime contracts, and budgets with built-in wizards. Sage Construction Management supports several contract types: fixed lump sum, cost plus, or unit price, and allows you to budget by contract amount, internal cost budgets, labor hours, and equipment hours. Invoices can be exported directly to your accounting and ERP system.

### **Project Management Tools to Improve Profitability**

Connect your teams in the field and in the back office to

efficiently execute projects on time and on budget. Project teams will be able to keep track of all necessary information in one central location. You can view Sage Construction Management from any browser or mobile device to develop, manage and collaborate on project tasks from any location.

### **Scheduling Made Simple**

Keep close tabs on your timelines. The scheduling features allow you to assign tasks to employees, vendors, and equipment resources with notifications directly from the schedule.

### **View, Edit, and Track Drawings and Specifications**

The built-in document viewer and markup tool let you highlight areas of interest and add notes. The document viewer supports up to 50 file formats including images, CAD files, and PDF's, and is available on the Sage Construction Management platform, mobile app, and TeamLink Portal. There is no need to download any other application to view or collaborate on these documents.





**Sage Construction Management** Development/Test Site

Projects Overview / Project List

**Projects**

Search  ☐ Group By Classification  Classification

Project Name	Sales	Bid	PM	Open Items	Overdue	Due in 7 Days	Due in > 7 Days	Progress	Total Invoiced
<b>Castro Circle Multi-family Development - Downtown</b> 199 N Rengstorff Ave. Mountain View, CA 94043 <a href="#">Map</a>	Russell G.	John O.	Floyd M.	2	13	0	0	70%	\$1,918,000 / \$2,740,000 (70%)
<b>Smith Residence - New Construction - 3 Story Home</b> 1481 Waterman Blvd. Fairfield, CA 94534 <a href="#">Map</a>	Russell G.	Caleb A.	Eleanor P.	8	0	29	0	15%	
<b>The Residences at Abigail Place - 6 Buildings</b> 7810 Village Center Dr. Austin, TX 78731 <a href="#">Map</a>	Robert J.	Kevin W.	Jane C.	0	3	17	0		
<b>Agatha Jackson Medical Center Outpatient Building</b> 1992 Simon Dr. Syracuse, NY 13224 <a href="#">Map</a>	Janice O.	Merve B.	Kevin H.	0	12	5	0		
<b>699 Walnut Valley Rd. Shopping Mall 24 Story Construction</b>	Russell G.	Erin A.							

Manage all your project operations from one platform with real-time data so you can make quick and informed decisions.

### Share Project Information with External Team Members

The TeamLink Portal lets you share business data and documents with external team members, sub-contractors, or vendors. It includes unlimited logins and customizable security settings so all project stakeholders have access to the information that is relevant to their project or role, and you can easily grant, or revoke access as needed. Data is updated in real-time from the Sage Construction Management platform, so everyone is working off of the same data.

### Align Finance and Operations with a Single Data Source

Improve margins on projects by aligning your financial and operational teams. Sage Construction Management integrates with your accounting and ERP solutions so you can transfer project and financial data between systems with the click of a button. You can view detailed reports on proposals, subcontracts, change orders, and progress invoices, and easily access dashboards with an overview of the project's finances.

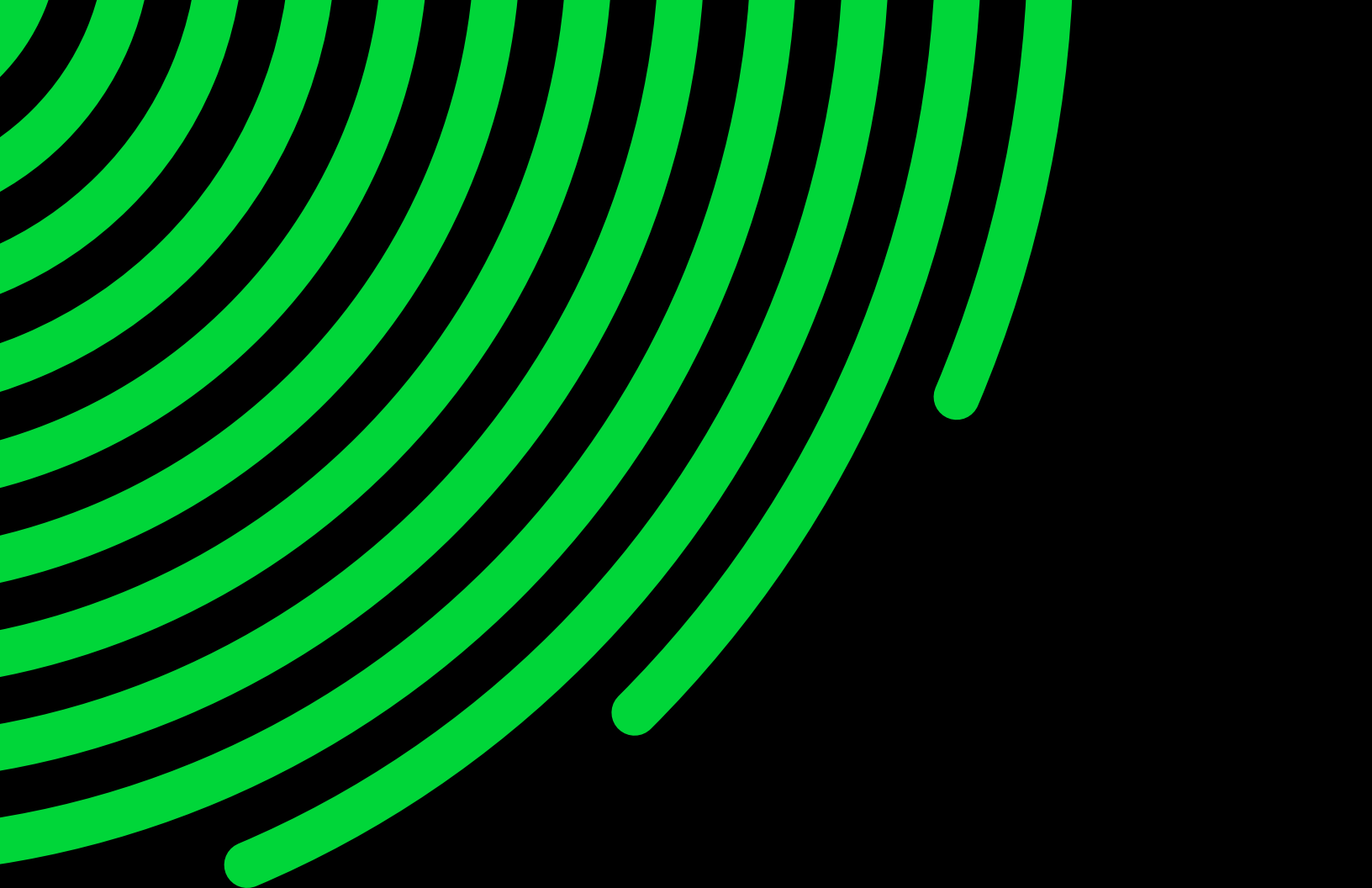
### Understand Your Current and Anticipated Project Costs Before Your Project is Complete

Understand the actual costs and WIP of your project long before it is finished. The procurement features in Sage Construction Management help you track committed costs, anticipated costs, RFP packages, purchase orders, bills, and more so you won't be caught off guard by project costs before they hit.

### Prevent Mistakes, Improve Installation Times, and Reduce Risk

Ensure work is done right the first time. Checklist templates help you to improve efficiency and deliver quality at every phase of your project. You can document inspections, safety meetings, site hazard assessments, and punch list items, and distribute as needed. If a safety incident occurs, you can easily keep track of all the information needed to adhere to government agency requirements.





A Sage partner

DEANDORTON

<https://deandorton.com/>  
(859) 255-2341

[info@deandorton.com](mailto:info@deandorton.com)

Dean Dorton is a leading accounting and business advisory firm in the Southeast. Our expert team enables client success with innovative thinking, personal service, and a commitment to accuracy and quality across our full suite of services.

[sage.com](https://sage.com)  
877-437-7765



Sage

©2023 The Sage Group plc or its licensors. All rights reserved. Sage, Sage logos, and Sage product and service names mentioned herein are the trademarks of Sage Global Services Limited or its licensors. All other trademarks are the property of their respective owners.