

Sage 300 Construction and Real Estate

# Gain deeper insight into your business with Sage 300 Construction and Real Estate

Your employees face issues that impact your company's profitability on a daily basis. These issues include controlling project schedules and budgets, managing labor, and minimizing risk. In order to make the best decisions for your business, they need access to meaningful information in your project accounting system. How can you provide them with real decision-making data?

**Sage 300 Construction and Real Estate** provides you with the insight you need—when it's needed most. You get quick access to critical data and the ability to make informed decisions to keep projects moving and profits improving. This book explores some of the many ways Sage 300 Construction can help you gain deeper insight into your business.

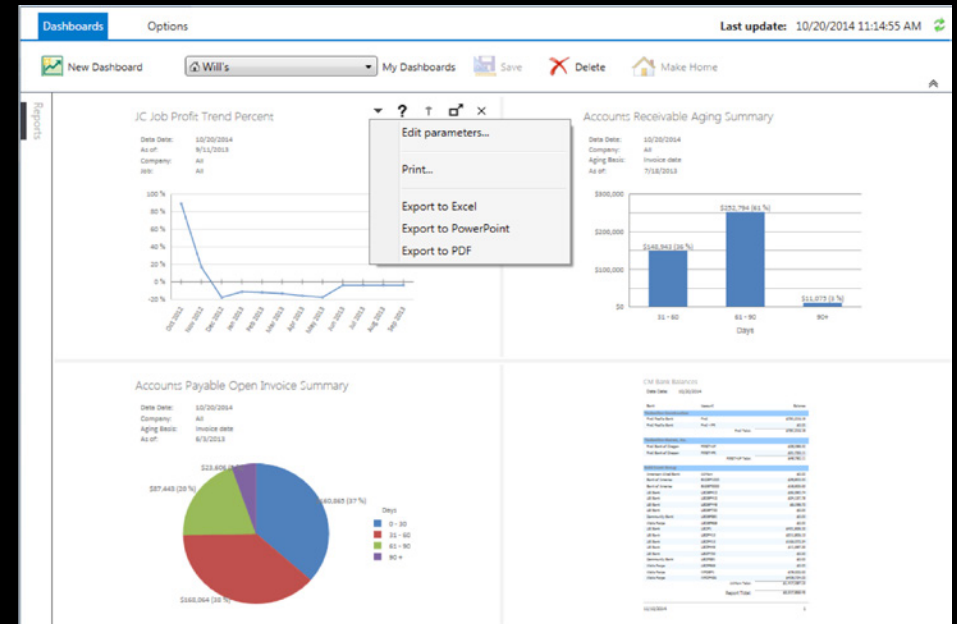
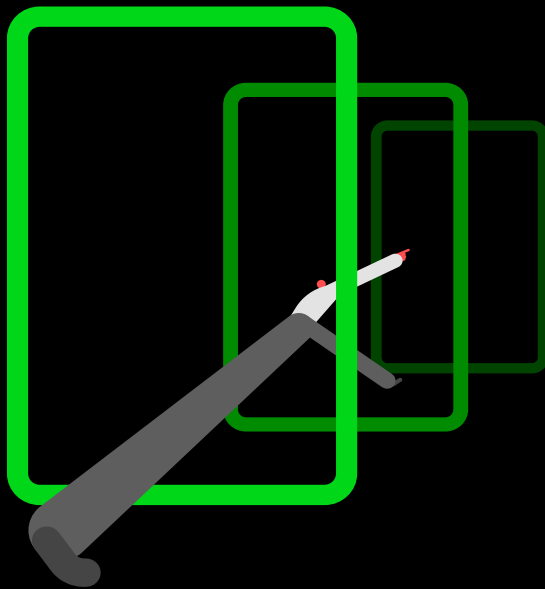
Sage



# See your business at a glance

The Executive Dashboard provides immediate access to the critical information you need to make informed decisions. With intuitive graphical reports, you can easily monitor trends such as project profitability, property occupancy, or cash flow and identify potential issues before they arise.

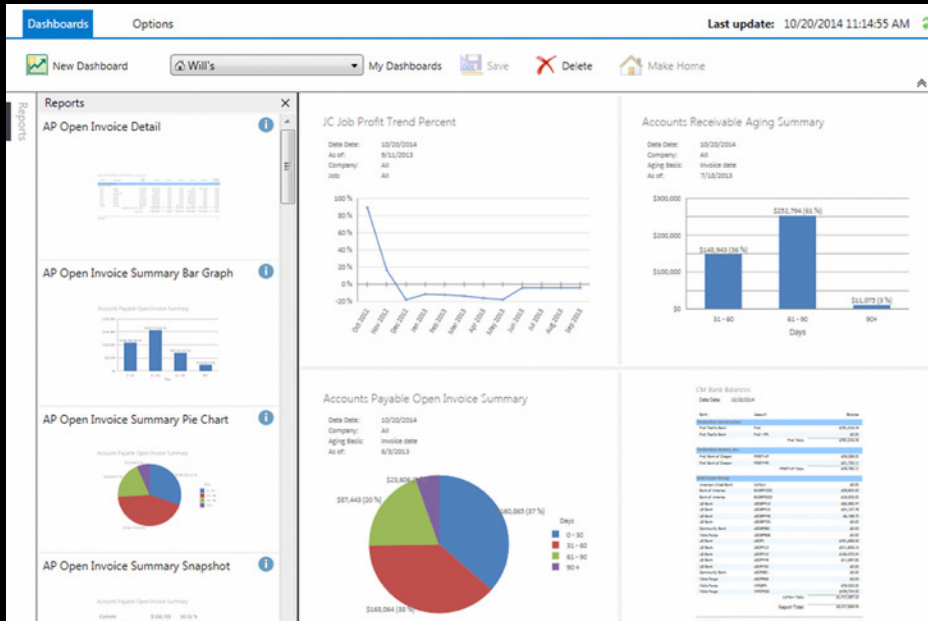
Use the Sage 300 Construction and Real Estate Executive Dashboard to drive the decision-making process and deliver the right information to the right people at the right time.



- Export dashboard information to PDF or Excel so you can share across departments.
- Leverage prebuilt dashboard views including cash snapshot, company overview, job profit, and property overview.
- Export to Powerpoint so you can bring key performance indicator information to life and effectively communicate what's going on in the business.
- See trends at a glance across projects and dates.



## Executive Dashboard



- Secure company information by setting up data views by organizational role.
- Customize your dashboard so you only see the information you need.
- View data across multiple companies when applicable.
- Use Executive Dashboard standalone or in conjunction with Sage 300 Construction.



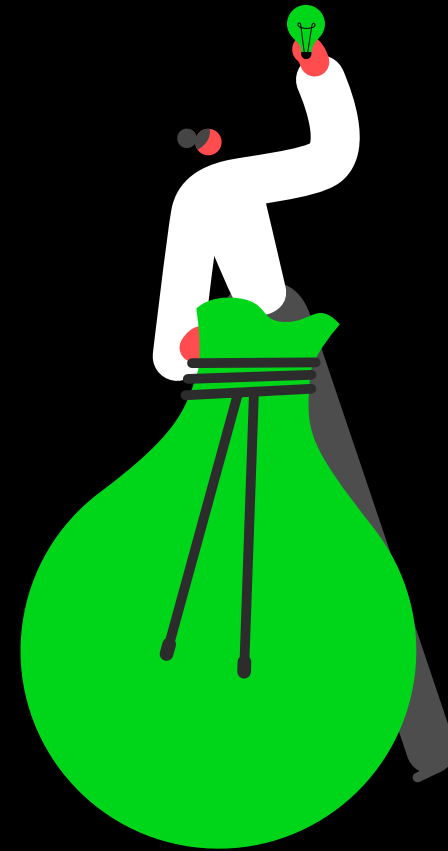
# Get clear, effective reports on the health of your business

Sage 300 Construction and Real Estate offers more than 1,400 prebuilt report formats plus the ability to create your own custom reports. Here are some of the essential reports you will need to run your business efficiently and effectively.

Keep your fingers on the pulse of profitability, cash flow, and billing for your jobs directly from the Sage 300 Construction and Real Estate Desktop.

Job Overview					October 20, 2014	
<b>03-001 NW Food Warehouse</b>						
<ul style="list-style-type: none"> <li>› Billing Summary</li> <li>› Buyout</li> <li>› Change Request Log</li> <li>› Correspondence Log</li> <li>› Cost Code Breakdown</li> <li>› Current Drawing Log</li> <li>› Insurance Log</li> </ul>		<ul style="list-style-type: none"> <li>› Job Contact List</li> <li>› Job Information</li> <li>› Labor Status</li> <li>› Meeting Items Log</li> <li>› Open Invoices</li> <li>› Quotes Due From Vendors</li> </ul>		<ul style="list-style-type: none"> <li>› RFI Log</li> <li>› Subcontract Log</li> <li>› S... Log</li> </ul>		
<b>Profit</b>		<b>Cash Flow</b>				
Original gross profit	227,227	10 %	In:	443,550		
Revised gross profit	252,570	12 %	Out:	461,971		
Pending gross profit	290,240	12 %	Variance	-18,421		
<b>Contract Status</b>		<b>Billing</b>				
Original contract amount	2,489,500		Billed-to-Date	886,800	35 %	
Approved contract changes	151,195		Cost-to-Date	757,152	30 %	
Revised contract amount	2,640,695		Variance	128,648		
Pending contract changes	24,855					
<b>Cost Control</b>		<b>Revised Estimate</b>		<b>JTD Cost</b>		
Labor	691,612		749,431	108 %	Original contract	28.28
Subcontract	654,869		654,869	100 %	Revised cost/sqft	29.27
Material	802,407		14,081	2 %		
Equipment	154,229		281,768	35 %		
Other	37,990		152,980	99 %		
Overhead						
Total	2,341,200		26,890	76 %		

- 1 Cash flow is negative—take immediate steps to improve.
- 2 The actual cost per square foot is higher than the original estimate—make a note to increase future estimates.
- 3 This project has used 99% of estimated equipment costs—is a change order needed?





Get a concise summary of change requests for any job from the Project Management module. The Change Request Log with Detail report provides an overview of where individual change requests stand, enabling proactive change management. Use the report to view details for each change request, as well as the overall contractual and profitability status of a job.

Change Request Log with Detail									
Timberline Construction							Date: 8/25/2014		
03-002 Clackamas Office Park #4									
Number	Date	Description	Schedule Impact	Source	Reason	Amount	Status	Approved Date	Change Order
1	5/11/13	Change circuit on fixtures in vestibule	0.5 day	RFI BE-01	SubRequest	467.50	Submitted		
2	5/14/13	Additional Sidelwalks	2 days	ASI EGA-01	Change in Scope	1,045.00	Submitted		
3	5/15/13	Additional sills @ main entrance		Bulletin EGA-02	Change in Scope	18,018.00	Submitted		
4	5/22/13	Extended use of temporary power		Other 1	Change in Scope	2,906.20	Approved	5/22/13	1
5	5/14/13	Removal of trees not included on C-2 drawings	4 days	RFI 7	Change in Scope	11,235.40**	Approved	5/17/13	3
6	5/18/13	Change hardware in main conferenceroom		Other EGA-WT-02	Owner Addition	537.90	Potential		
7	5/28/13	Site electrical conduit		Other EGA-WT-003	Change in Scope	6,421.90**	Approved	5/28/13	3
8	5/29/13	Addition of 31 isolation valves		Other EGA-WT-004	Engineering Omission	1,083.50**	Approved	5/28/13	3
9	5/21/13	Painting of exposed sprinkler pipe		None	Engineering Omission	1,375.00	Approved		2
10	5/28/13	Upgrade networking system		None	Change in Scope	6,600.00	Approved	5/27/13	4
11	5/28/13	Incorrect Mix of Concrete		CCD	Change in Scope	3,850.00	Approved	5/28/13	5
13	5/29/13	Add bicycle enclosure off back entranceway		Addendum	Change in Scope	1,485.00	Approved	5/29/13	6
14	4/8/13			Other	Change in Scope	0.00	Potential		
							Original Contract Amount:	831,930.00	
							Approved Contract Changes:	33,957.00	
							Revised Contract Amount:	865,887.00	
							Pending Contract Changes:	20,068.40	

\*\* Approved price amounts have not yet updated the accounting approved and revised contract amounts, but are included in the approved and revised contract amounts in the Contract Summary.

- Choose the report that best fits your company's needs from a selection of 1,400 prebuilt templates.
- See how project scope changes impact the schedule.
- Get updates on change order status.
- Understand the impact of contract changes on costs and profits.





Keep tabs on your subcontracts for any job from Project Management by using the Subcontract Log with Detail report. See a complete breakdown by cost code to see real-time progress of your committed cost.

**Subcontract Log with Detail**

Timberline Construction 08/25/2014 Page 1

00-001 NW Food Warehouse Project Manager: Pat Siravo

Subcontract	Description-Sub-Status	Cost Code Cat	Original Amount	Pending Amount	Approved Amount	Revised Amount	Invoiced Amount	Retained Amount	Paid Amount
01001-01	Plumbing - Kingston Plumbing	Committed 15-400 S	88,015.44		2,900.00	85,515.44	22,001.50	2,200.15	12,421.35
1	Plumbing	15-400 S	88,015.44	.00	2,900.00	85,515.44	22,001.50	2,200.15	12,421.35
	Plumbing Totals								
01001-02	Tile Flooring - Dallas Tile & Carpet	Committed 5-250 S	134,400.00		.00	134,400.00	.00	.00	.00
1	Resilient Tile Flooring	5-250 S	134,400.00	.00	.00	134,400.00	.00	.00	.00
	Tile Flooring Totals								
01001-03	HVAC Systems - Jackson Heating & AC	Committed 15-300 S	177,905.00		800.00	177,805.00	.00	.00	.00
1	HVAC	15-300 S	177,905.00	.00	800.00	177,805.00	.00	.00	.00
	HVAC Systems Totals								
01001-04	Fire Protection - Sprinkler Contractors	Committed 15-300 S	54,600.00		750.00	55,350.00	.00	.00	.00
1	Fire Protection	15-300 S	54,600.00	.00	750.00	55,350.00	.00	.00	.00
	Fire Protection Totals								
01001-05	Refrigeration - Barth Electric	Committed 15-250 S	76,380.00		.00	76,380.00	.00	.00	.00
1	Refrigeration	15-250 S	76,380.00	.00	.00	76,380.00	.00	.00	.00
	Refrigeration Totals								
01001-06	Electrical - A-1 Electric Company	On Hold 15-100 S	82,000.00		250.00	82,250.00	8,250.00	825.00	5,197.50
1	Electrical Subcontracts	15-100 S	82,000.00	.00	250.00	82,250.00	8,250.00	825.00	5,197.50
	Electrical Totals								
01001-08	Exterior Signage - Bronson Signs	Committed 15-400 S	30,000.00		.00	30,000.00	.00	.00	.00
1	Exterior Signs	15-400 S	30,000.00	.00	.00	30,000.00	.00	.00	.00
	Exterior Signage Totals								
01001-09	Painting - Beaverton Painting	Committed 5-510 S	4,920.00		400.00	4,520.00	.00	.00	.00
1	Painting - Exterior	5-510 S	4,320.00	215.00	.00	4,320.00	.00	.00	.00
2	Painting - Interior	5-510 S	600.00	215.00	.00	4,920.00	.00	.00	.00
	Painting Totals								
01001-10	Landscaping - Northwest Landscaping	Committed 2-500 S	3,250.00		5,600.00	8,850.00	4,500.00	450.00	.00
1	Landscaping	2-500 S	3,250.00	.00	5,600.00	8,850.00	4,500.00	450.00	.00
	Landscaping Totals								
03001-06	Upgrade office lighting - A-1 Electric Company	Committed 15-100 S	5,000.00		60,000.00	65,000.00	5,000.00	500.00	4,500.00
1	Electrical Sub	15-100 S	5,000.00	.00	60,000.00	65,000.00	5,000.00	500.00	4,500.00
	Upgrade office lighting Totals								
03001-07	Add insulation for cool room - Alpha Insulation	Committed 7-200 S	3,000.00		.00	3,000.00	300.00	.00	.00
1	Insulation	7-200 S	3,000.00	.00	.00	3,000.00	300.00	.00	.00
2	Insulation	7-200 M	1,500.00	.00	.00	1,500.00	.00	.00	.00
	Add insulation for cool room Totals								

- Keep up to date on progress of committed costs.
- Quickly compare up-to-date invoice and payment information against original subcontracts' contracts.
- Avoid surprises! Get a holistic overview of all of your committed costs by type to help manage project progress proactively.



Compare your estimated labor units (how much time it will take to perform a task) to what is actually happening with the required labor production report. Make course corrections to stay on budget.

Cost Code	Description	Unit Desc	Est Hours	Est Units to Place	Est Factor	JTD Hours	JTD Units in Place	JTD Factor	Remaining Hours	Remaining Units	Required Factor
<b>SPERMWORK</b>											
2-220	Excavate & Backfill	cuyd	2,766.00	1,525.00	.55	2,497.00	1,350.00	.50	69.00	175.00	2.54
2-510	Asphalt Paving	sqy	315.00	380.00	1.21	341.00	384.00	1.13		4.00	
2-520	Cement Paving	yds	77.00	840.00	7.01	84.00	510.00	6.07		30.00	30.00
<b>CONCRETE</b>											
3-210	Reinforcing Steel	ton	318.00	25.00	.08	296.00		.08	22.00	1.50	.07
3-310	Structural Concrete	cuyd	748.00	2,278.00	3.05	642.00		3.27	106.00	178.00	1.68
3-345	Concrete Finishing	sqy	1,448.00	104.44	.07	1,376.00		.07	72.00	74.44	.20
3-470	Tilt-Up Precast	lft	877.00	1,200.00	1.37	84.00		1.24	30.00	180.00	5.00
<b>METALS</b>											
5-310	Steel Decking	sqft	486.00	80,000.00	164.61				486.00		164.61
<b>THERMAL &amp; MOISTURE PROTECTION</b>											
7-510	Built-Up Bituminous Roof	sqy	2,390.00	80.00	.03				2,390.00		.03
<b>DOORS &amp; WINDOWS</b>											

- 1 For each cost code, know the estimated hours, units, and productivity factor and the job-to-date hours, units, and factors.
- 2 See the remaining hours, units, and required productivity factor to meet estimates.
- 3 Spot and correct potentially costly production problems before they develop into overruns.
- 4 Learn the exact productivity required to complete the job within estimates.





# Find the information you need

Inquiries give you instant onscreen access to the information you need to make more informed decisions. Use one of the many prebuilt inquiries to quickly search for specific data or create your own customized inquiries using the Inquiry Designer.

## Job Overview Inquiry

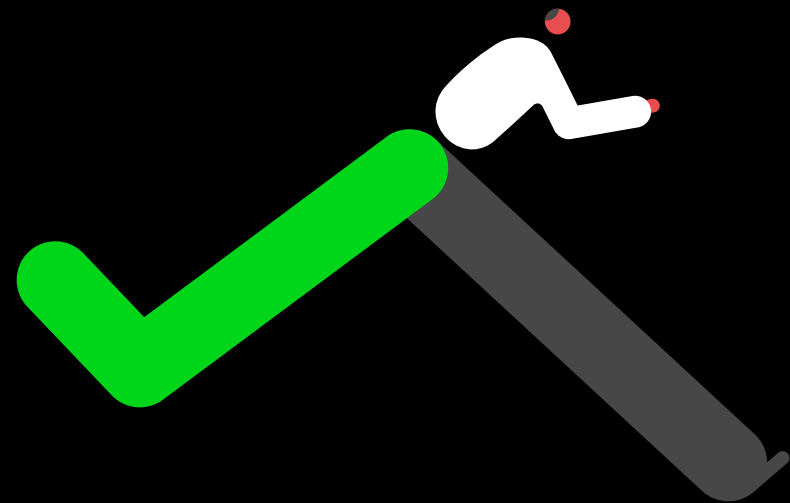
See your projected cost at complete and projected profit for any job. It's easy to search, select, and filter by job code, description, percent complete, and more.

Job	Des	Original Contract	Pending Changes	Approved	Revised Contract	Total Estimate	Total Commitment
03-001	03-001	2,489,500.00	24,655.00		2,640,695.00	2,311,900.38	1,603,856.68
03-002	03-002	831,930.00	19,425.70		897,210.20	827,931.61	382,071.73
03-003	03-003	479,300.00	7,500.00		479,300.00	442,347.39	122,922.90
03-004	03-004	18,000.00	5,000.00		18,000.00	14,315.00	2,200.00
03-005	03-005	18,000.00	5,000.00		18,000.00	14,315.00	2,200.00

Code	Description	Estimate	Date Cost	Variance
1-000	GENERAL CONDITIONS	138,577.36	44,029.83	94,547.47
1-040	Coordination	57,134.58	14,367.34	42,767.24
1-045	Insurance	5,050.00	4,895.00	155.00
1-065	Permits - General	20,239.00	20,239.00	
1-510	Temporary Utilities	14,888.43	4,355.80	10,532.63
1-580	Project Identification	167.20	172.75	5.55-
1-710	Final Cleaning	41,098.15		41,098.15
2-000	SITWORK	354,078.52	366,318.03	12,239.51-
2-075	Concrete Removal	720.00		720.00
2-140	Dewatering	99,475.63	100,638.68	1,162.85-
2-220	Excavate & Backfill	144,649.07	154,167.12	9,518.05-
2-510	Asphalt Paving	99,003.02	99,297.16	294.14-
2-520	Cement Paving	6,980.60	7,715.07	734.47-
2-900	Landscaping	3,250.00	4,500.00	1,250.00-
3-000	CONCRETE	325,839.28	255,625.49	70,213.79
3-110	Structural Formwork	21,466.12	15,554.26	5,911.86
3-130	Permanent Forms	3,010.85	2,427.72	583.13
3-210	Reinforcing Steel	23,431.69	20,132.46	3,299.23
3-220	Welded Wire Fabric	23,799.00	19,109.47	5,689.53
3-250	Concrete Accessories	1,452.92	403.99	1,048.93
3-310	Structural Concrete	142,722.67	140,627.98	2,094.69
3-345	Concrete Finishing	45,482.43	33,908.44	11,573.99
3-470	Tilt-Up Precast	64,473.60	24,461.17	40,012.43
5-000	METALS	211,766.93	28,444.00	183,322.93
5-210	Steel Joists	132,701.96	28,444.00	104,257.96
5-310	Steel Decking	76,104.50		76,104.50
5-540	Castings	2,960.47		2,960.47
6-000	WOOD & PLASTICS	148,844.72	11,954.34	136,890.38
6-050	Exteriors	569.61		569.61

Job Overview Inquiry—Cost Code Detail



- 1 Drill down to the level of detail that you need to see.
  - 2 Print or send to Excel directly from Inquiry window.
  - 3 Compare original and revised contract amounts against committed costs in easy-to-view columns.
- Adjust your views and save them for future use.



## Profit Summary Inquiry

See your projected cost at complete and projected profit for any job. It's easy to search, select, and filter by job code, description, percent complete, and more.

Job	Revised Contract	Cost At Complete	Projected Profit	% Comp
03-001 NW	2,640,695.00	2,341,200.38	299,494.62	32.00
03-002 Clark Park #4	897,210.20	827,931.61	69,278.59	22.00
03-003 Fort Wayne Sher's Club	479,300.00	442,347.39	36,952.61	34.00
03-004 Metro Bus Stop 47	18,000.00	14,315.00	3,685.00	
03-005 Metro Bus Stop 39	18,000.00	14,315.00	3,685.00	
03-006 PGE Line W0#345		14,589.11	14,589.11-	
03-007 Low Income Housing				
03-008 Rose Garden Arena Rewiring				65.00
03-009 OHSU Light				
03-010 Tri-Tech				
03-011 Cordova				
03-012 Tri Tech				
03-014 Downtown				
03-015 Beaver tor				

Cost Code	Total Estimate	JTD Cost	Remaining Estimate
1-000 GEN	138,577.36	4,029.89	94,547.47
1-045 Co	57,134.58	14,367.34	42,767.24
1-065 Pe	5,050.00	4,895.00	155.00
1-065 Pe	20,239.00	20,239.00	0.00
1-510 Te	14,888.43	4,355.00	10,533.43
1-580 Proj	167.20	17.00	150.20
1-710 Final Cleaning	41,098.15		41,098.15
2-000 SITEMORK	354,078.52	366,318.00	-11,239.48
2-075 Concrete Removal	720.00		720.00
2-140 Dewatering	99,475.83	100,638.69	-1,162.86
2-220 Excavate & Backfill	144,649.07	154,167.12	-9,518.05
2-510 Asphalt Paving	99,003.02	99,297.16	-294.14
2-520 Cement Paving	6,980.60	7,715.07	-734.47
2-900 Landscaping	3,250.00	4,500.00	-1,250.00
3-000 CONCRETE	325,839.28	255,625.49	70,213.79
3-110 Structural Formwork	21,466.12	15,554.26	5,911.86
3-130 Permanent Forms	3,010.85	2,427.72	583.13
3-210 Reinforcing Steel	23,431.69	20,132.46	3,299.23
3-220 Welded Wire Fabric	23,799.00	18,109.47	5,689.53
3-250 Concrete Accessories	1,452.92	402.89	1,049.92

### Profit Summary Inquiry—Cost Code Detail

Monitor job activity with simple navigation from the job to the cost codes and detailed transactions.

- 1 Click on a specific job so you can drill down to detailed estimates and job-to-date information for each cost code.
- 2 Drill down to a particular cost code to get the category detail; click a cost code to show individual transactions.
- 3 Drill down further to view distributions for each transaction.
- 3 Keep tabs on your total costs to date so you can proactively manage your jobs.





## Vendor Compliance Inquiry

Vendor	Name	City	State	Telephone	Lien Waivers	Certified Reports	Vendor Misc.	Job Misc.	General Liability	Auto Insurance
100	A-1 Electric Company	Tigard	OR	(503) 744-3200	Click to See	Click to See	Click to See	Click to See	Expired	Expired
101	Alpha Insulation	Forest Grove	OR	(503) 921-1175	Click to See	Click to See	Click to See	Click to See	Expired	Expired
102	Acme Door & Glass Distributors	Portland	OR	(503) 245-8162	Click to See	Click to See	Click to See	Click to See	Expired	Expired
103	Ace Drywall	Tigard	OR	(503) 958-3838	Click to See	Click to See	Click to See	Click to See	Expired	Expired
104	AAA Insurance and Bonding	Portland	OR	(503) 242-5558	Click to See	Click to See	Click to See	Click to See	Expired	N/A
105	Adams Electric	Portland	OR	(503) 936-3200	Click to See	Click to See	Click to See	Click to See	Expired	Expired
200	B & M Marble, Inc.	Portland	OR	(503) 242-1500	Click to See	Click to See	Click to See	Click to See	Expired	Expired
201	Becker Roofing Company	Estacada	OR	(503) 675-3200	Click to See	Click to See	Click to See	Click to See	Expired	Expired
202	Beaveron Painting	Beaveron	OR	(503) 626-8484	Click to See	Click to See	Click to See	Click to See	Expired	Expired
203	Barth Electric	Beaveron	OR	(503) 456-3945	Click to See	Click to See	Click to See	Click to See	Expired	Expired
204	Bronson Signs	Oregon City	OR	(503) 950-8454	Click to See	Click to See	Click to See	Click to See	Expired	Expired
205	Beaveron Sand & Gravel	Beaveron	OR	(503) 656-2481	Click to See	Click to See	Click to See	Click to See	Expired	Expired
206	City of Deaveron	Deaveron	OR	(503) 626-2500	Click to See	Click to See	Click to See	Click to See	Expired	Expired
300	Crocker Electric & Welding	Gresham	OR	(503) 520-1000	Click to See	Click to See	Click to See	Click to See	Expired	Expired
301	Cook's Lumber	Tigard	OR	(503) 956-6513	Click to See	Click to See	Click to See	Click to See	Expired	Expired
302	Commercial Pest Control	Tigard	OR	(503) 636-6575	Click to See	Click to See	Click to See	Click to See	Expired	Expired
403	Donaldson Acoustics	Portland	OR	(503) 242-6500	Click to See	Click to See	Click to See	Click to See	Expired	Expired
501	Dalton & Carpet	Hubbard	OR	(503) 655-5252	Click to See	Click to See	Click to See	Click to See	N/A	Expired
500	Electricia, & Associates	Portland	OR	(503) 242-6687	Click to See	Click to See	Click to See	Click to See	N/A	Expired

Full Name	Primary Vendor	Name	Vendor Level	Secondary Vendor Name	Secondary Vendor Relationship	Lien Waiver Type	Status
George Gresham	100	A-1 Electric Company	Primary			Conditional Partial	Outstanding
Devin	100	A-1 Electric Company	Primary			Unconditional Partial	Outstanding
Kevin	100	A-1 Electric Company	Secondary	Sorrento Interiors (NW Portlan	A-1 Electric Compan	Unconditional Partial	Compliant
1000	100	A-1 Electric Company	Primary			Unconditional Partial	Compliant
1100	100	A-1 Electric Company	Secondary	Sorrento Interiors (NW Portlan	A-1 Electric Compan	Unconditional Partial	Outstanding
1101	100	A-1 Electric Company	Primary			Conditional Partial	Outstanding
1111	100	A-1 Electric Company	Primary			Unconditional Partial	Outstanding
1200	100	A-1 Electric Company	Primary			Conditional Partial	Outstanding
100	100	A-1 Electric Company	Primary			Pre-lien	Compliant
100	100	A-1 Electric Company	Primary			Conditional Partial	Outstanding
100	100	A-1 Electric Company	Secondary	Dhu, Kathy (Crocker Electric &	A-1 Electric Compan	Conditional Partial	Outstanding
100	100	A-1 Electric Company	Primary			Conditional Partial	Outstanding
100	100	A-1 Electric Company	Primary			Unconditional Partial	Outstanding
100	100	A-1 Electric Company	Primary			Conditional Partial	Outstanding

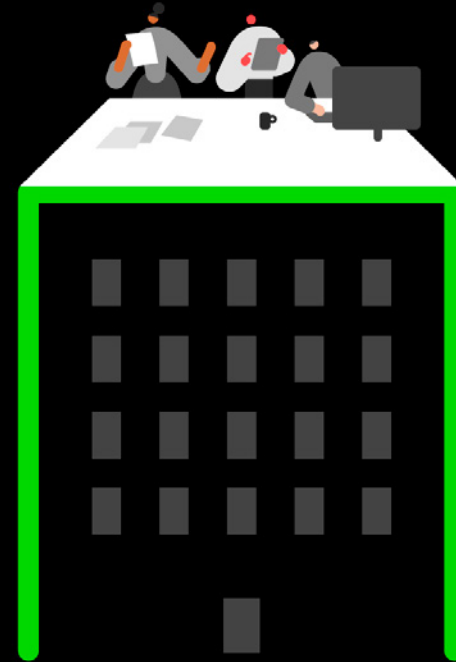
- Minimize your exposure to risk of subcontractor and vendor noncompliance with the powerful Vendor and Job compliance inquiries (available in the Accounts Payable and Project Management modules).

- Drill down to get a quick view of insurance certificates, expected lien waivers, certified reports, and other compliance items across your jobs or for a specific vendor and secondary vendors.



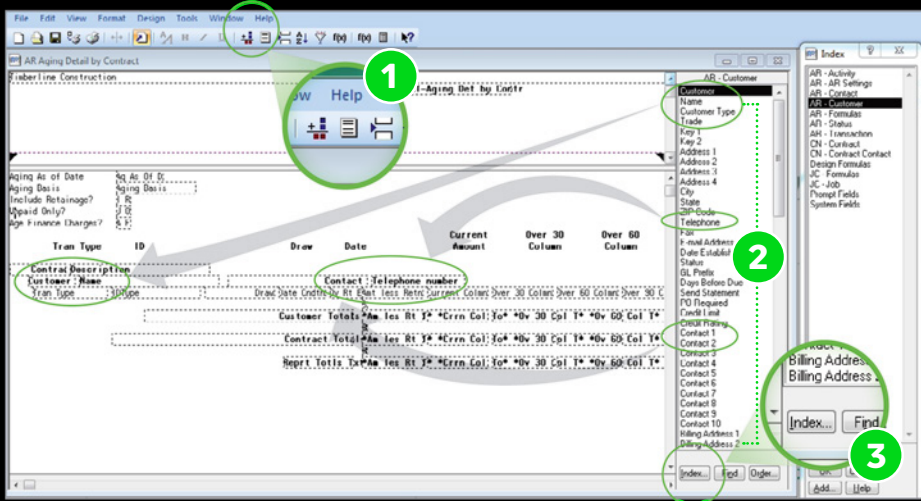


# Design the reports you need—using skills you already have



## Report Designer

With Sage 300 Construction Report Designer, you can get started right away using prebuilt reports—no changes are needed to get up and running. To meet changing requirements, you can easily modify these prebuilt reports or create your own. Simply point, click, drag, and drop fields to create your own customized reports. Plus, you can give each person in your organization a personalized report menu containing the reports he or she needs for the job.

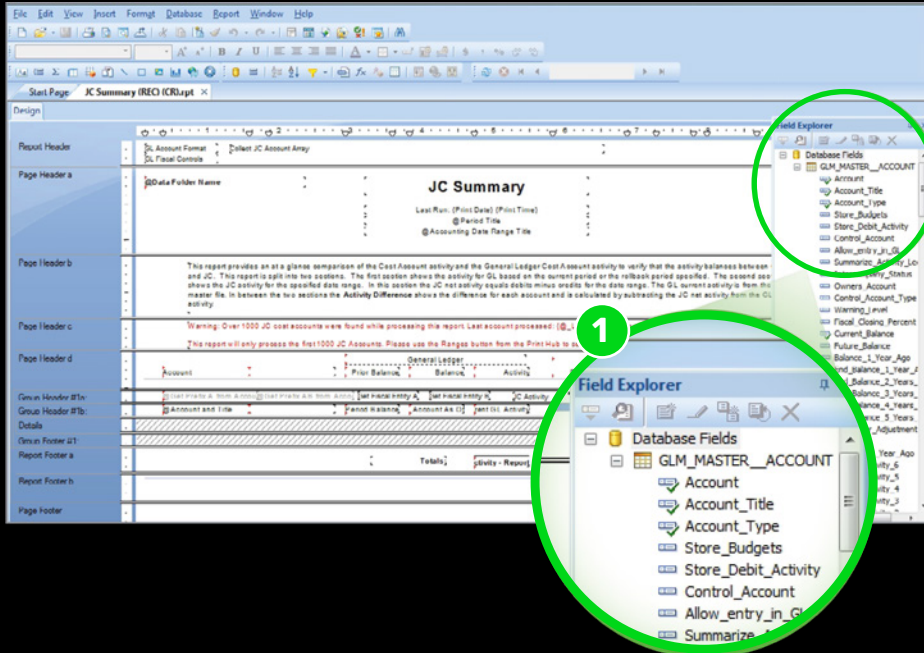


- 1 Choose from a list of included formulas or create your own.
- 2 Use quick and intuitive drag-and-drop tools to modify or create Sage 300 Construction and Real Estate reports.
- 2 With minimal training and documentation you can take control of your data and get the reports you need the way you want to see them.
- 3 To select additional fields, use the Index button and a list of Sage 300 Construction and Real Estate records used by the report appears onscreen.

Information can be accessed from multiple data areas including accounts receivable, billing, and job cost.

## SAP® Crystal Reports

If you have in-house SAP Crystal Report design skills, you can use or modify reports to suit your needs.



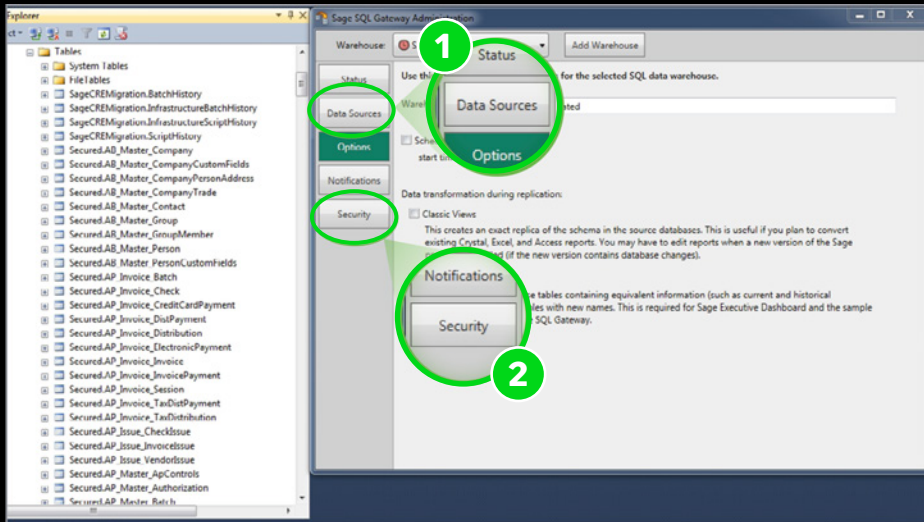
- Use SAP Crystal Reports to create and customize presentation-quality reports from your Sage 300 Construction and Real Estate systems data.
- 1 Get one-click access to Sage 300 Construction and Real Estate data and built-in or customized formulas.





# Consolidate organizational data

Consolidate data from multiple company sources using Sage SQL Gateway so you can see a more holistic view of your organization. If you have in-house SQL skills, you can develop reports using SAP Crystal Reports or SQL Server Reporting Services, or you can modify Sage 300 Construction reports to use SQL data when desired.



- Copy and maintain your Sage 300 Construction and Real Estate data in a synchronized SQL database by using the Sage SQL Gateway.

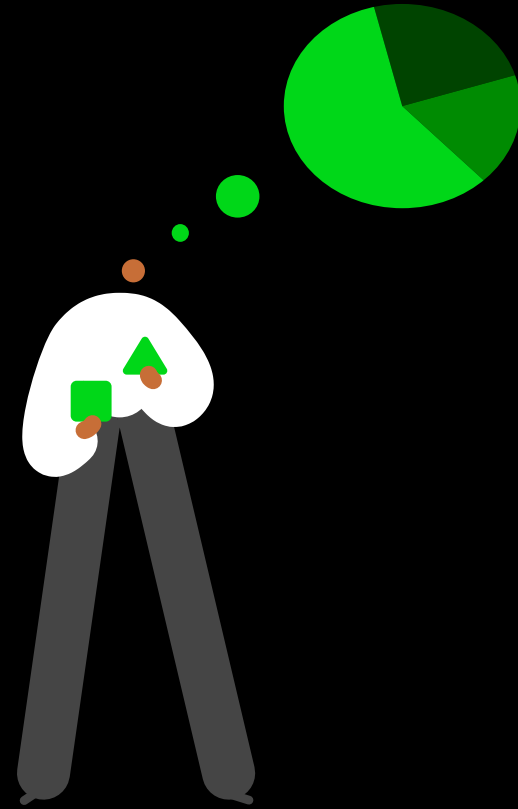
- 1 See reports across your entire organization when using multiple companies.
- 2 Secure your data throughout your organization by role.

# Proactive alerts

Your employees spend a lot of time entering many details, documents, and data into your business management system. How do you get this information out of the system in a way that automatically informs people what they need to do every day? Sage MyAssistant automatically generates reports, spreadsheets, documents, and email alerts, proactively distributing information to those who need it so they can keep all phases of a project or property on time and on budget.

Create alerts with Sage MyAssistant

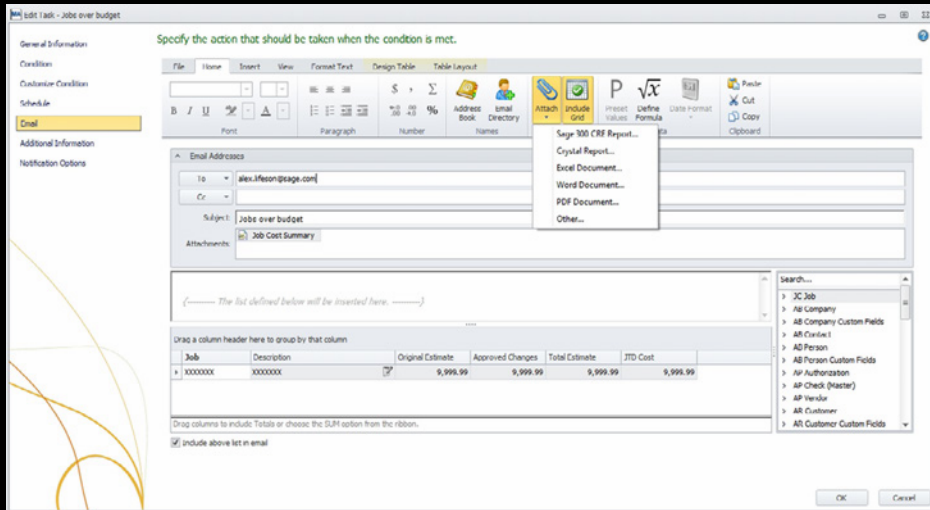
Task Name	Notifications	Last Updated			
JC Cost Codes that are over budget based on [unclear] complete	0				
Jobs missing a project manager email address	0				
Jobs missing a Superintendent email address	0				
<b>Jobs over budget</b>	<b>1</b>	<b>9/25/2014</b>			
Job	Description	Original Estimate	Approved Changes	Total Estimate	JTD Cost
03-006	PGE Line WO#345	0.00	0.00	0.00	14,589.11
Jobs over budget by a specified percent	Cost Control	0			
Jobs where a GL Prefix has not been entered	Job Setup	0			
Jobs where a Payroll Local has not been entered	Job Setup	0			
Jobs where a Payroll state has not been entered	Job Setup	0			
Jobs where a Payroll WC group has not been entered	Job Setup	0			
Jobs where a retainage reduction might be needed	Cost Control	0			
Jobs where Committed costs are greater than the Estimate	Cost Control	0			



- Create tasks to automatically generate and send reports inside and outside of your organization.
- 1 Attach reports from Sage 300 Construction and Real Estate or SAP Crystal Reports and specify the information that should be included.
- 2 Drag and drop data fields to include in the body of the email.



Proactively distribute reports by schedule, task, or on demand

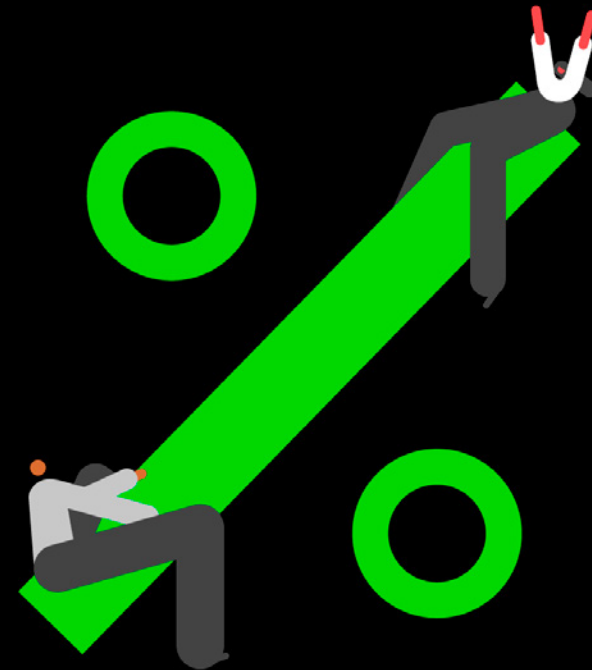


- Generate reports using Sage 300 Construction and Real Estate and SAP Crystal Reports. Attach them to notifications that can be sent throughout your organization.



# Easy reports and financials using Excel

Microsoft® Excel is an easy-to-use tool with which most of your office personnel will have experience. Using Sage Office Connector, you can create reports and analyze data in Excel including real-time information from Sage 300 Construction and Real Estate. Office Connector allows you to query, report, and move data back and forth between Excel and Sage 300, ensuring you always have the most up-to-date information.



1

Past 6 Months (Actuals)

Job-Level Revenue & Cost Forecast	11-Jan	11-Feb	11-Mar	11-Apr	11-May	11-Jun	11-Jul	11-Aug
Revenue	29,500	198,000	298,000	251,500	251,500	251,500	251,500	251,500
Cost	(26,455)	(109,713)	(212,422)	(245,71)	(245,71)	(245,71)	(245,71)	(245,71)
Net	2,835	20,279	26,108	68,082	68,082	68,082	68,082	68,082

24-Month Forecast

24-Month Forecast	11-Jun	11-Jul	11-Aug
Revenue	325,000	256,000	255,000
Cost	(170,000)	(175,000)	(160,000)
Net	155,000	81,000	95,000

2

3

Net Projected Income \$ 488,746

- Harness the power of Microsoft Excel and the extensive data in Sage 300 Construction and Real Estate to analyze, forecast, and update your data directly from Excel.

- 1 Record or update all of your job-level projections using actual to-date values and forecasts in Excel.
- 2 Get insight into current and future trends and use data to make financial and project management decisions.
- 3 Store future projections in Sage 300 Construction and Real Estate and make changes from within Excel.





A Sage Partner



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