Sage 100 Contractor

Sage 100 Contractor manages all phases of construction and service management in one easy to use, integrated solution

Sage

Table of Contents

Sage

Introduction

See what you've been missing

With easy access to critical business and project information, Sage 100 Contractor helps small to mid-sized contractors manage business operations more effectively. Features like a customizable dashboard and work center, email alerts, and instant access to project status and profitability details ensure contractors always have a clear view of the full picture. To illustrate how Sage 100 Contractor helps improve business visibility and results, we'll walk you through some common scenarios you might encounter in four key areas:

Overseeing the business

Managing construction

Running the office

Providing excellent service

Sage

Overseeing the business

As a leader at your construction company, many count on you to effectively oversee the business. Sage 100 Contractor gives you the visibility to know exactly where your business stands each day, enabling you to guide others and make decisions—all based on accurate and current information.

During each part of the construction cycle, you and your team can rely on an easy-to-use and centralized solution to move the work throughout the organization.

Everyone can easily get to the information needed to perform their specific role—whether it's managing jobs in progress, handling financials, or providing great service. With Sage 100 Contractor, your company can have the construction-specific capabilities needed to drive your business into stronger performance and stability.
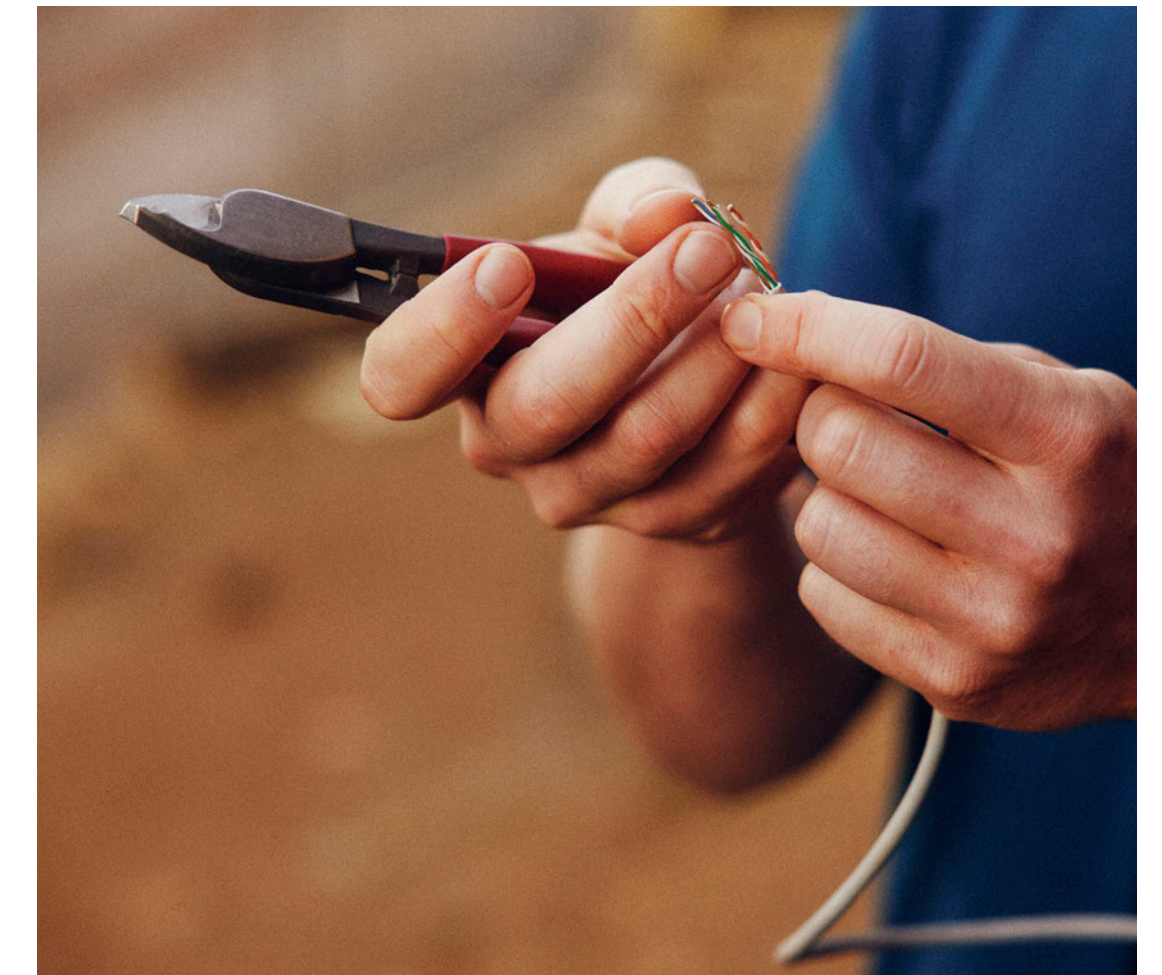
The owner

Tom needs visibility into the whole organization to make sure important decisions are not delayed or detrimental to profitability.

When Tom began his business, he had his arms around every facet: estimating, accounting, production, and analysis. He was everywhere—on the job site meeting with clients and crunching numbers at the office. As the business became more successful, he hired more people. He used to intuitively know the status of every job, but now that the work is delegated across a team, he may not know what (if any) profit is made until a final invoice is submitted.

The company's generic off-the-shelf accounting software was fine when business was simpler.

With business growth, the need to quickly get key information became greater. Tom became frustrated because he couldn't easily see the current costs of each job.

He also knew business growth could hide real job profitability. Whenever his bookkeeper assembled and created cost reports for him, they would often be too late to make timely adjustments on the job if costs were rising too fast. He also couldn't get the full cost details on completed jobs to be certain that the next bid reflected the profit potential he knew was possible.

Sage 100 Contractor was the turning point
When his company started using Sage 100 Contractor, Tom was able to access all of the business information from one place, and best of all, it was current and accurate—across accounting, estimating, scheduling, project management, job cost, and service management.

Now he can view many reports on a dashboard that shows him up-to-date cost information on one job or group of jobs, so he knows where costs are occurring from the start. He also sees job profitability, cash flow, work in progress, and profit and loss statements and can make more informed decisions at a moment's notice.

When Tom logs on to his computer each morning, he gets all the critical data he needs to monitor business performance —right from his Sage 100 Contractor dashboard—or through email alerts. If a number concerns him, for instance when viewing underbilled jobs or aging receivables, he can quickly drill down to see the details to learn what jobs are affected and review any related source documents like billing invoices, change orders, and more.

Even estimates are more accurate. The company can bid more precisely and closer to the actual final cost when competition is tight. And because Tom's company consistently completes projects on time and on budget, business is going strong.

A better bird's-eye view for every team member
With Sage 100 Contractor, Tom has a snapshot of where his business stands at any given moment. Each team member in the office or in the field has access to just the relevant information he or she needs—the right data at the right time to make better decisions. The results: fatter profit margins, more even cash flow, faster project completion, happier employees, better responsiveness, and ultimately higher customer satisfaction.

Tom may check on the work done from estimates to the job site, but he finds that as the business grows, he now has the visibility and timely access to the information he needs to more easily guide the business to greater financial health.

Sage 100 Contractor helps you keep your finger on the pulse of your business.
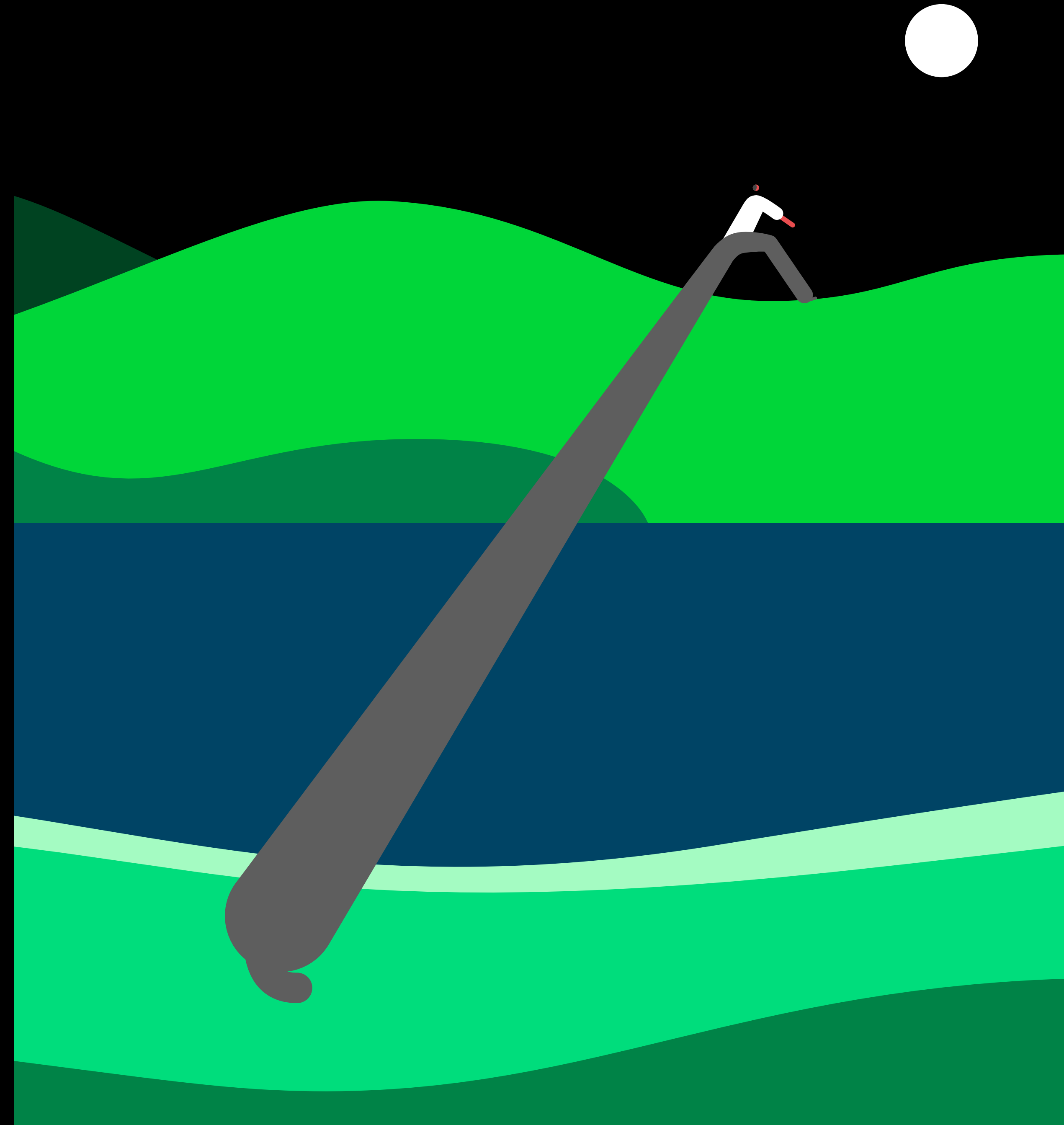
Sage

Running the office

It's not just about the numbers; it's about getting accurate numbers in front of the right person, in the right place, at the right time. That means making sure that business processes run smoothly and efficiently together, and everyone is kept informed and ready for the next step. Sage 100 Contractor brings together accounting, financials, job costing, payroll, vendor and subcontractor management, reporting, analysis, and more in one place.

With everyone using the same solution, extra work and mistakes are avoided, and the most current information is easily accessible. You'll have more confidence in your numbers and the visibility to handle anything—tracking a lien waiver, the committed cost on a job, even an unexpected audit—without delays or headaches.

Controller

Chuck found that managing company finances and risks had challenges at every new turn.

Supervising finances in an industry where tight profits can easily erode to nothing is Chuck's everyday challenge. So many areas have associated risk: uninsured claims if an insurance certificate expires, penalties or fines from errors in a certified report, lost revenue if change orders are not properly recorded, delays or rework if a subcontract change order is missed, or late vendor payments when customer billing has been delayed. The list goes on. And Chuck knows how much is at stake if anything slipped by.

He always thought if he had more timely access to current information about the business, he could make better decisions. But business can't wait for the office to create reports. He couldn't wait to pay people, talk to a bank, or make many daily judgment calls.

When Chuck saw how Sage 100 Contractor integrated the whole business—including office and field activities—in a very straightforward, comprehensive way, he realized how much of his current time was taken up manually tracking down and assembling information.

For example, before Sage 100 Contractor, he'd have to reconcile different papers, emails, spreadsheets, and accounting information to calculate a true cash flow status.

Now, because he has work in progress reports available to him automatically, Chuck can instantly access the earned revenue statements he needs to accurately monitor the financial health of the business.

Now he sees the business information and performance indicators he needs to stay ahead
The key reports that Chuck routinely reviews have given him back time in his workday and have noticeably reduced the company's risk. If he wants to know details about a job or group of jobs, like percentage of completion or profitability by job, he can now just click a button and view the most current data. He can also review a dashboard each morning to immediately see what may need his attention that day, such as dropping bank balances or aging receivables.

He also receives email alerts to help him stay proactive and fix problems before they happen, such as costs that have exceeded a budget line in a job.

Time and materials contracts used to be equally as challenging as fixed-bid contracts

Sometimes the business takes on a time and materials contract, which has inherent risks if costs are not properly allocated, accounted for, or left unbilled. Now that payroll time is easily entered daily in the field with mobile devices through Sage Service Operations, Chuck is delighted by the exactness of the labor numbers that are fed into the Job Labor Journal. By accessing a Committed Cost Report, he can see the remaining budget at any time and what has been committed to purchase orders and subcontracts. The office is now able to bill faster, keeping cash flow healthy, and Chuck can determine the projected profitability of the job to take any necessary corrective action.

Risks are reduced, and obstacles are removed

No longer is information keyed for a second time, last-minute reports created under high pressure, nor decisions made solely from past experience. Now Chuck has the visibility he needs to see what's happening in the business today and can play a larger role in keeping the business operations moving forward. With Sage 100 Contractor, Chuck knows what jobs are the most profitable and where they can save money, and he can be more strategic in managing the potential growth of the company. With the insight provided from automated and centralized business information, Chuck can better tackle business challenges and risks head on, and guide the team to maximize profit opportunities.

Sage

Bookkeeper

The effort to change over to new accounting software paid off in a big way for Maggie.

In her bookkeeping role, Maggie requires precision. As the one responsible for keeping the daily books and accounting, Maggie could not relax until the figures balanced. Her organizational skills and attention to detail have always been highly valued by her boss.

When the company decided to find a new accounting solution better suited to construction, she was more than cautious. Sage 100 Contractor sounded good, but she was comfortable and confident using their existing accounting software and spreadsheet methods. She could see the value of having

finances and operations managed together using a single integrated solution, but these changes would require adjustment and would take time to learn—and use with confidence.

The transition was easier than she expected
From the start, a local Sage business partner worked with Maggie on an implementation plan to begin the transition, giving helpful advice on good business practices too. Her partner provided her with the resources and help she needed to transfer information from QuickBooks®, spreadsheets, and other various sources into Sage 100 Contractor.

They also identified a variety of training options for Maggie so she could get up and running with their new solution quickly and easily. After she started to use the software and had a question, she could connect with a Sage support expert—someone who specifically understands construction companies. She was happy to get solid answers to her questions quickly. Also, to her pleasant surprise, navigating Sage 100 Contractor was quite easy; for example, a personalized desktop view allowed her to focus on just the tasks she personally performed each day.

Now she's never been so confident in the numbers
With Sage 100 Contractor, Maggie has the full confidence that what is entered into the software matches up with the estimates, billing, payroll, and payables; she knows that all the transactions have been properly allocated to each job. Using one central system to run the entire business, Maggie now does not have to manually reconcile her job cost totals to her financial records. They always balance with each other!

Sage

Also, she no longer needs to react to last-minute requests from management or the field to create special reports, or gather the latest information. The key reports they need are now automatically emailed to them at scheduled intervals.

Because Sage 100 Contractor gives her the ability to set up the right pay groups to each job, get union reports, certified payroll, and worker's compensation, reporting has become a snap. The field can submit time reports from mobile devices, and when she approves payroll, it automatically calculates the agency's wages and benefits package requirements.

When the company got audited by the union, Maggie knew this would be the real test. After she submitted union reports for the audit—reports that can be automatically generated from the system—she and the owner were thrilled. No more hassle, no inaccuracies found—no fines! She was especially happy to have avoided the arduous long overtime usually associated with these types of audits.

Now she's never been so confident in her reports
Maggie no longer spends days compiling data or assembling special reports, working to reconcile different pieces of information into one coherent whole. Because everything is stored centrally and tied together, the entire reporting process is streamlined, and any reported information stays up to date. Email alerts also help her catch and address a potential issue before it happens, such as a payable about to be overdue. Freed from the ongoing headaches of compiling data and reconciling discrepancies, Maggie no longer spends long evenings in the office.
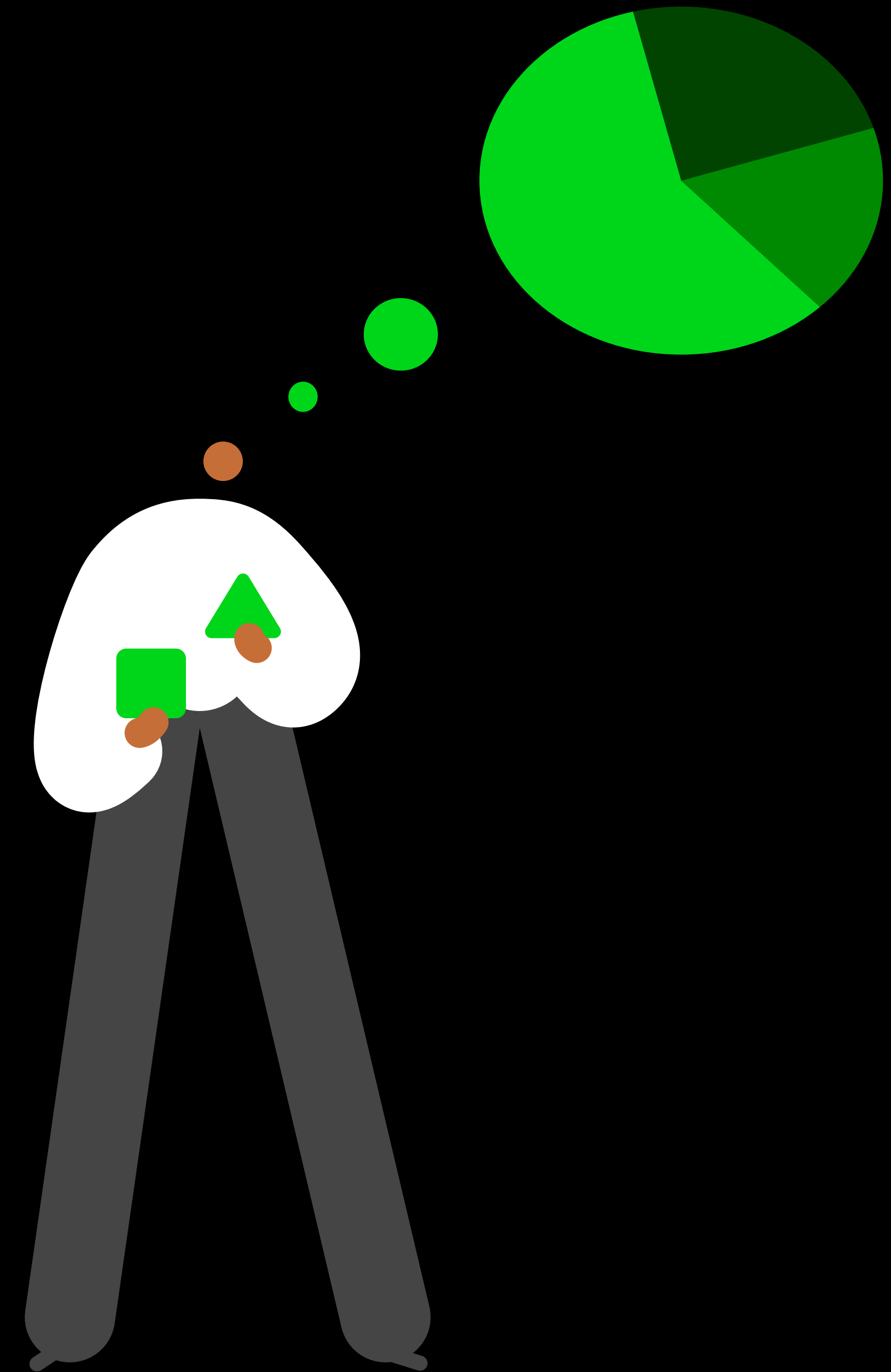
With everything organized and accurate, she can trust she's on top of her work.

Sage

Managing construction

Details matter. Whether you're putting together an estimate, managing a project, or making sure everything comes together in the field, you're faced with an enormous amount of information.

Sage 100 Contractor helps you easily create competitive estimates, better monitor productivity issues, and track job costs against budgets in real time. So you can grasp the big picture quickly or zero in on any number of critical details instantly to know if you're headed in the right direction or need to make a quick adjustment.

Estimator

Now every time Greg creates an estimate, he lays the foundation that keeps everyone anchored as the project progresses.

As both the estimator and project manager for his company, Greg was used to being the expert and custodian of all costs from the beginning to the end. For years he had used Microsoft Excel® to create his estimates. Once the job started, he would reenter estimate data into other software to create purchase orders, budgets, and subcontracts—long and tedious work. He spent many evenings just checking and rechecking his numbers to ensure his estimates used updated information, fixing formulas, or just avoiding mistakes as he moved data from Excel to project documents.

Once a new job started, Greg expected to navigate without a complete map. His estimates were totally separate from the job cost budget that was tracked in the company's accounting software. Any job cost reports that the bookkeeper could pull together would lag behind current job activities and not tie back to the costs forecasted in his estimates. For a next bid, Greg would try to figure out how his previous estimates lined up with what actually happened. But he knew there would be, yet again, guesstimates, long hours reconciling numbers, and too many unknowns to tell the full story.

Tying estimating details directly into accounting and project management resulted in less work, better information, and more profit. With Sage Estimating, Greg is amazed at how easily he can create estimates, jump-start job costing and purchasing processes, and instantly get the kind of cost-variance reporting to better prepare him for future bids. He remains comfortable working within a familiar spreadsheet view, but now his costs are backed by a strong cost database, and built-in takeoff and error-checking capabilities help ensure his formulas are correct, cells are completed, and nothing

critical has been forgotten. He can even produce an estimate in half the time! Once the company has been awarded the job, Greg can quickly produce initial job cost budgets, purchase orders, and subcontracts right from the estimate. With Sage 100 Contractor, Greg can now see estimated, actual, and committed costs at every stage as the job progresses to know where things stand and where they will likely end up without intervention. Even change order updates are directly tied to a job, cost code, budget, and back to the estimate.

Now he knows how much everything on a project really costs so the team can improve the next bid—ensuring it's both profitable and competitive.

The biggest cost surprise came after they changed how employees reported on time. When employees in the field started using Sage Service Operations on their mobile devices to submit their payroll time, Greg discovered the company was spending 10% more in labor than he had been allotting in the estimates. After some discussion, the team decided it was too expensive to self-perform certain tasks. They chose to subcontract those tasks going forward, which later made a significant impact to the bottom line.

Estimating is now fast, accurate, and even more competitive
Using a solution designed specifically for construction estimating, Greg now has full confidence in his estimates. He can create faster, more precise estimates, resulting in more job opportunities and greater profit potential. His ability to deliver winning bids and manage those projects to profitability distinguish him as a key contributor in the business.

Building to profitability even before the job begins.

Project Manager

Nick understands that a project's profitability depends on how quickly he can make an informed decision.

Knowing how a job is performing comes from experience, but experience is not always enough to keep a project fully under control. Nick can recognize what a job's status should be and whether or not the project team is on track. He can evaluate the state of the site and the quality of the work, understand the team's capacity to finish what's left, or keep on top of the many daily reports.

As a project manager, he's earned respect from his employer and from his industry contacts.

But even the best project manager relies on up-to-date project information to make critical decisions quickly, so an unexpected event doesn't undercut all the profits.

Real-time job status is the key
Before implementing Sage 100 Contractor, Nick couldn't see the current job status picture. Too often, what he needed was available too late. For example, if productivity deteriorated, it may not be caught for a week or more. Taking time to pencil out where things stood financially was diffcult and definitely could not be done on a daily basis. Aside from the lag in labor cost reporting,

Nick often found an invoice not coded to the proper job, skewing the numbers. Or a missing change order not approved in time, slowing down the project. Worse, the team at the job site would choose to go ahead with an unapproved change order to keep production moving, but doing so would put billable work at risk.

Sage

Taking control made the difference

On the first new project using Sage 100 Contractor, Nick found he was really in control in a way he'd never experienced. He could easily view job progress reports, and, if any costs looked questionable, he could drill down for more details. With everyone working within one system fitted to their construction processes, the office is now able to keep up with quickly inputting change orders, paying new invoices, managing payroll, tracking labor costs, and entering other job-related costs in real time. The result is greater understanding of the financial health of the project at any given time. Now, Nick has the visibility he needs to make better decisions for project profitability.

Insight is now just another part of the project

Nick can review and stay on top of the information he needs every morning through his Sage 100 Contractor dashboard and reports.

He also receives email alerts when the approval process for a change order is taking too long or when a vendor certificate of insurance is about to expire, so he can catch potential issues before they become true problems.

Nick has new confidence that everyone is using the latest information to move their part of the project forward. They no longer use outdated or incomplete data that can result in additional costs and project delays.

His team's ability to easily submit time worked using a mobile device is shortening processes, so if there are any mounting labor costs, Nick can act sooner. The blind spots are gone: Nick knows where he's at on each job, on a daily basis.
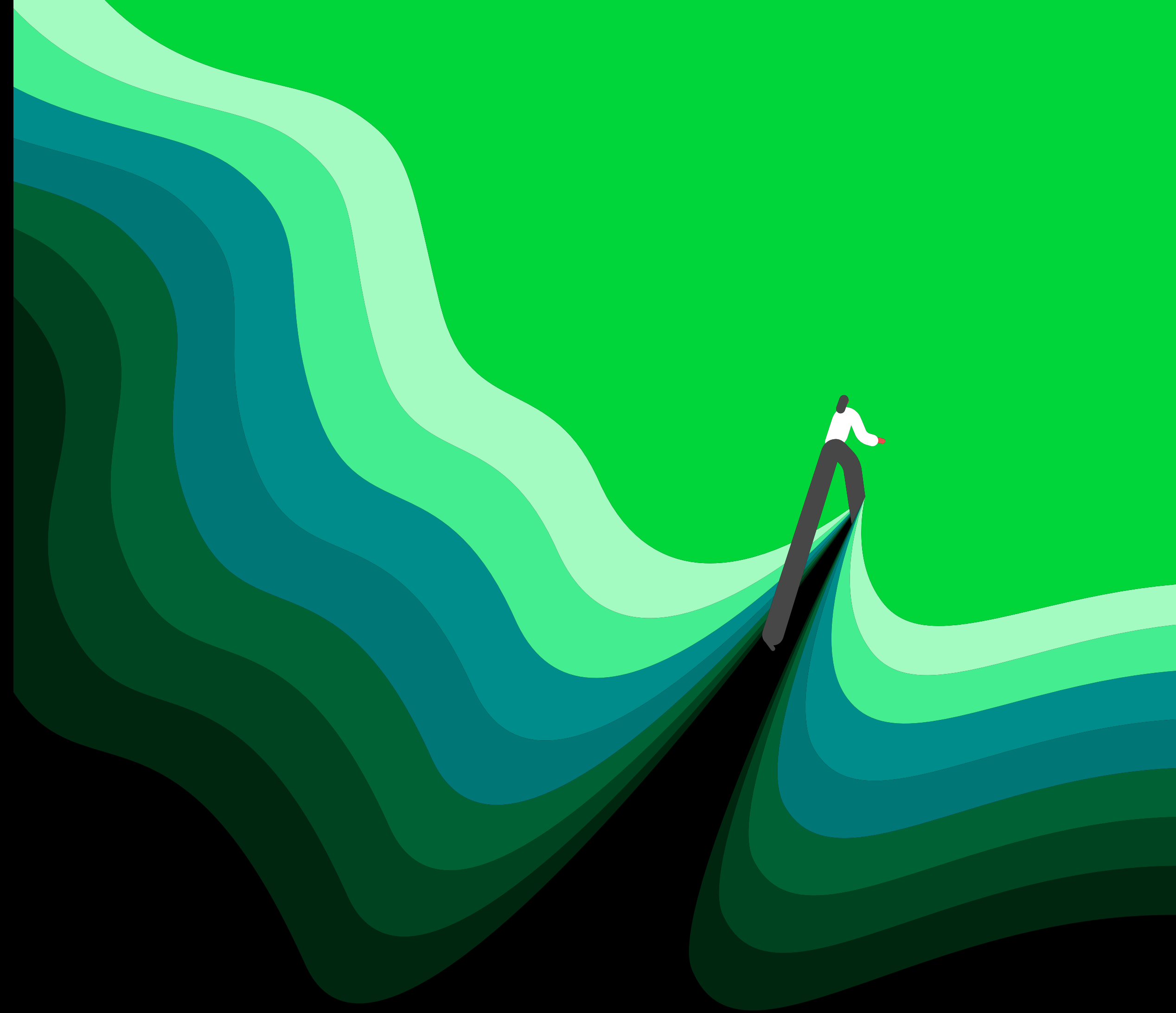
Making the kind of decisions to keep the job on track and in the black has never been easier.

Sage

Providing excellent service

Those who provide field service face high customer expectations in an increasingly competitive environment. Sage 100 Contractor has the tools you need to stay on top of ever-changing service logistics, all while keeping your customers happy.

Because Sage 100 Contractor integrates service, dispatch, scheduling, billing, equipment, and inventory with accounting and other operations, you're able to avoid the extra work and mistakes that can occur when using multiple systems. With Sage 100 Contractor, you're positioned to maximize your service productivity and effectiveness while providing excellent service to every customer.

Service Manager

To keep service operations moving, Bob used to rely on many scribbled sticky notes that he would place all over his desk and computer. Vital information remained in his head.

Now, when he looks back on the way he used to get things done, Bob isn't sure how he kept track of it all. Or what would have happened if he couldn't be there.

One place for all the details
Since the company began using Sage 100 Contractor Service Management, Bob has successfully ditched the sticky note system.

It was an easy transition, and his new processes are intuitive. He's seen efficiency rise in dispatching, performance, and billing. He has also improved service by assigning the right technician to the right job at the right time. And Bob can see current inventory levels and keep them up to date as the service work is performed, eliminating any overbuying the company used to do.

Starting with Sage 100 Contractor dispatch board, Bob schedules work orders when the calls come in, moves work orders when a change is required, builds preventative maintenance into the schedule, and easily finds the technician closest to address an emergency call. From the same dispatch board, Bob is able to email work order details to the technicians for their entire day or as the service requests come in to give field technicians more time

working and less traveling. Bottom line, Bob is able to make sure his technicians are busy, clients are being served, and jobs are getting done in priority order.

From taking calls, scheduling and dispatching technicians, stocking parts, and getting work orders in and out, Bob can handle it all in a more efficient manner than the days of scribbling on whiteboards and moving sticky notes around.

Sage

Saving time all along the way

As work is completed, technicians can now enter labor hours from their mobile device, and the information is automatically populated on the work orders for invoicing and payroll. This saves Maggie, their bookkeeper, the hassle of having to rekey information and avoids the potential for errors. It also allows them to bill clients much sooner than before, improving cash flow.

Taking the pain out of inventory

Bob's company keeps a stock of basic inventory items used for many of its jobs. Under the previous manual and spreadsheet-based system, managing inventory and ordering parts was a major source of Bob's frustration. He used to go through a spreadsheet line by line to check what was ordered against what had been used. Too often for Bob, the information would be inaccurate, causing delays and resulting in customer complaints.

Today, the company uses Sage 100 Contractor Inventory with single-screen capability for immediate visibility into inventory status. Parts that appear on work orders flow to inventory. When inventory becomes depleted or reaches a minimum predetermined quantity, the system provides triggers so parts can easily be reordered. Bob can see reorders to each supplier and at what prices.

Payable invoices can also be generated quickly by associating the invoice to the details from purchase orders.

Additionally, Bob can communicate with his technicians, emailing them information about the work order or parts, cutting the time he previously spent checking among different systems, and reducing inventory count mistakes. Now costs are accurate. Buying unnecessary inventory and paying for unused materials are things of the past.

Bob runs a tight ship

Thanks to Sage 100 Contractor Service Management, Bob has a stronger handle on his service operation. He has seen a higher level of customer satisfaction and better cash flow management from the improvements his team has made in dispatching, billing, and inventory tracking. Now Bob can look to build business by increasing service capacity and enabling technicians to provide excellent customer service.

Bob has moved to a place of control and assurance.

Sage

Technician

As a service technician, David used to feel like he was working on an island. When he got in his truck and headed out to a customer site, he felt isolated and disconnected.

David would have to call Bob, the company's service manager, numerous times throughout the day to check in, saying he was headed to a job, he was at a job, he was leaving to get a part, it was taking longer than expected, the job was complete, and so on. Even more frustrating—when a work order changed, he wanted to know how it would impact the rest of his schedule. It was not easy for David to get answers right when he needed them.

Staying connected in the field
Today, utilizing Sage 100 Contractor Service Management through a mobile service app keeps David connected to the right information and the right people. Gone are the constant back-and-forth phone calls to the office. Using his tablet, David exchanges information with the office about where he should be and what needs to be done on this job and the next.

It's critical for David to have a clear understanding not only of today's work but also what was performed previously. The last technician may have suspected a different issue. Before he meets with a customer, David can pull up the work order with the customer's account history and read a previous technician's notes. Now he is prepared to address the issue at hand and can avoid repeating the same work as before.

Streamlining purchase orders and inventory
In some cases, David may need a part that wasn't provided by the warehouse. Sage 100 Contractor enables him to promptly acquire a purchase order number from the bookkeeper—without a trip to the office.

Sage

After the work is complete, David hops back in the truck and checks to see if there are any changes in his schedule or new assignments. At the end of the day, he no longer needs to go through the tedious work of performing truck inventory. When he updated work orders throughout the day, the truck stock quantity on hand is updated too. Now the office has a real-time view into what David needs restocked so they can get his parts ready to roll the next morning.

With Sage 100 Contractor, David has no surprises. He has the inventory he needs and is properly assigned to a job. The best part is seeing the face of a happy customer after a job well done.

It's good to be connected.

Sage

A Sage Partner

AltaVista
T E C H N O L O G Y

info@altavistatech.com

altavistatech.com

855.913.3228

Sage