

September 18, 2024

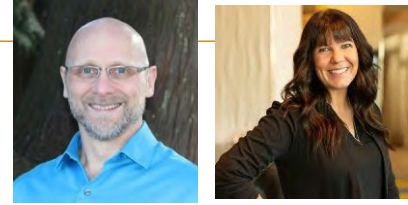
Sage Construction Management



Sage

WELCOME

Today's Presenters



Todd Bowlsby
Senior Manager
Armanino Advisory LLC



Kallie Jackson
Partner Account Manager
Sage Intacct

KNOWLEDGE

Learning Objectives



Learn how to leverage Sage's powerful tools to enhance efficiency



Learn how to reduce costs and ensure project success from start to finish



Determine valuable insights about how Sage Construction Management can prepare your company for growth

CPE Information

Recommended CPE: 1

Delivery Method: Group
Internet Based

Field of Study: Specialized
Knowledge

Program Level: Basic

Advanced Preparation: None

Prerequisite: None

Exploring New Areas

Agenda

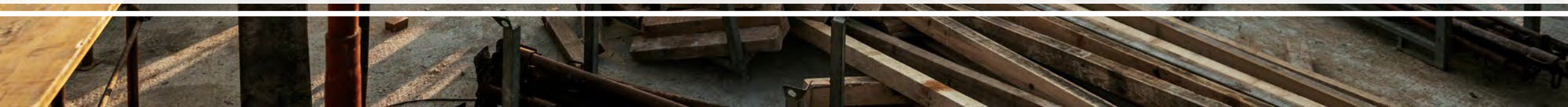
Financial Accounting vs.
Construction Accounting

Sage Construction Management
Overview

Sage Construction Management
Demo



Financial Accounting vs. Construction Accounting



Construction Accounting

How it differs from Financial Accounting

Financial focus is job or project focused

- Job Costing helps identify true costs and profitability of each project.

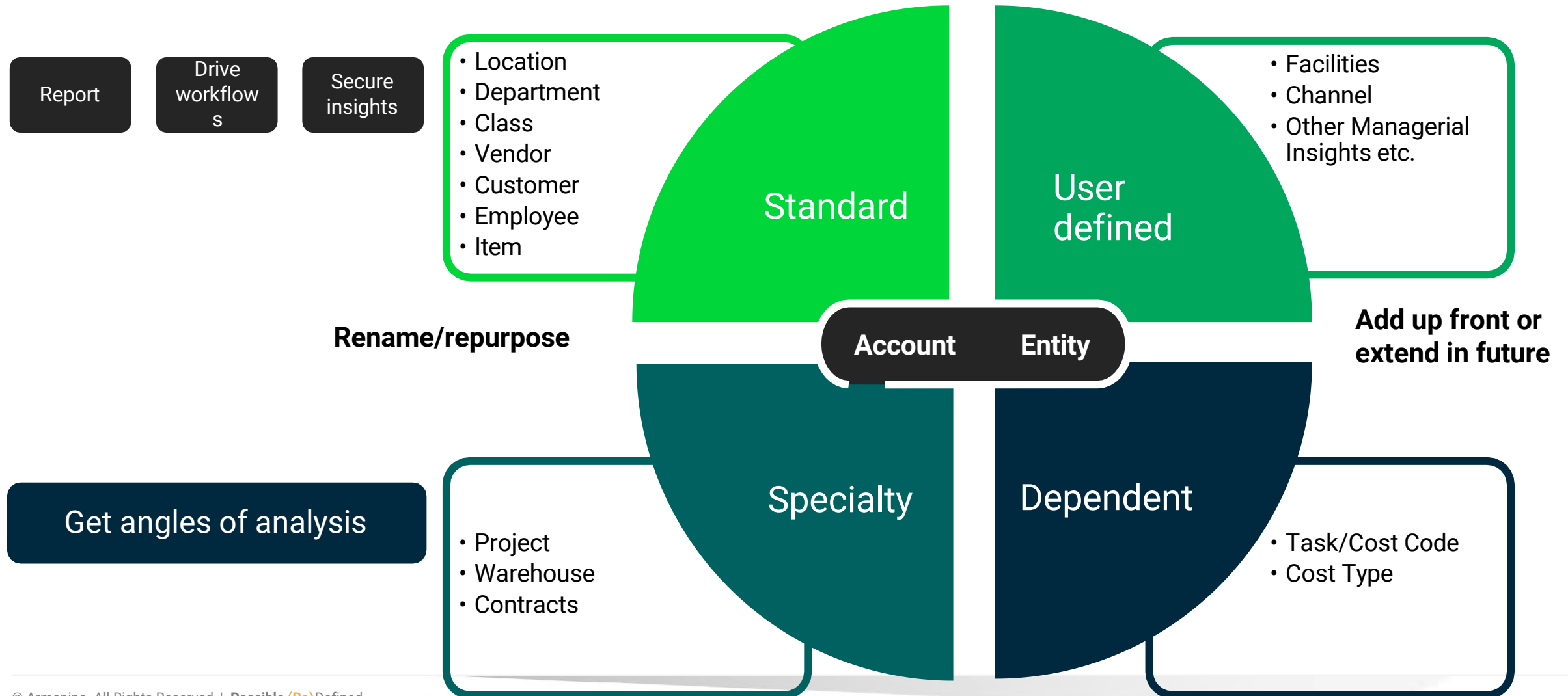
Decentralized production – the construction site is not fixed in a plant, warehouse, or even state.

- Tax implications
- Mobilization costs
- Field data capture and access

Long-term contracts – Projects can take months or even years.

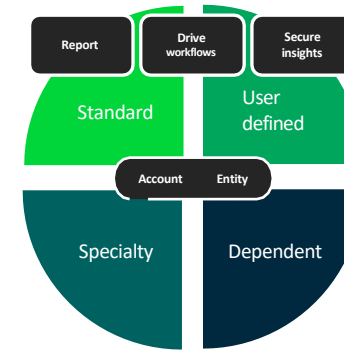
- Purchasing processes are multi-event / month documents (Contract, COs, Pay Applications)
- Revenue recognition practices impacted

Sage Intacct — it's a Dimensional world



Sage Intacct — Dimensions with power

ID ▾	Name	Revenue Producer
<input type="text"/>	<input type="text"/>	<input type="text"/>
100	Sales	<input checked="" type="checkbox"/>
200	Services	<input checked="" type="checkbox"/>
300	Admin	<input type="checkbox"/>
310	HR	<input type="checkbox"/>
320	Finance	<input type="checkbox"/>
330	IT	<input type="checkbox"/>
400	Marketing	<input type="checkbox"/>
500	Product	<input type="checkbox"/>



Streamlined Tracking

1. Native Hierarchies
2. Extend with Custom Attributes
3. Flexible On-Demand Groupings

Reduce effort while extending insights

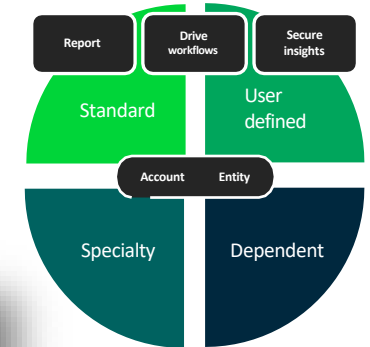
	Revenue Year Ending 12/31/2020 Actual	Operating Expenses Year Ending 12/31/2020 Actual	Net Earnings
▼ Revenue & Supporting Depts			
▼ Revenue Generating			
Sales	20,080,064.38	14,730,969.40	5,349,094.98
Services	5,645,774.76	2,097,823.31	3,547,951.45
Total Revenue Generating	25,725,839.14	16,828,792.71	8,897,046.43
▼ Support Centers			
Admin	0.00	2,410,474.87	(2,410,474.87)
HR	0.00	562,467.67	(562,467.67)
Finance	0.00	1,437,671.64	(1,437,671.64)
IT	0.00	2,233,866.91	(2,233,866.91)
Marketing	0.00	5,283,975.86	(5,283,975.86)
Product	0.00	3,324,299.60	(3,324,299.60)
Total Support Centers	0.00	15,252,756.55	(15,252,756.55)
Total Rev & Support	25,725,839.14	32,081,549.26	(6,355,710.12)

Sage Intacct — Dimension reporting pivots

Example of how you can analyze on-the-fly

1. Location
2. Department
3. Vendor

</

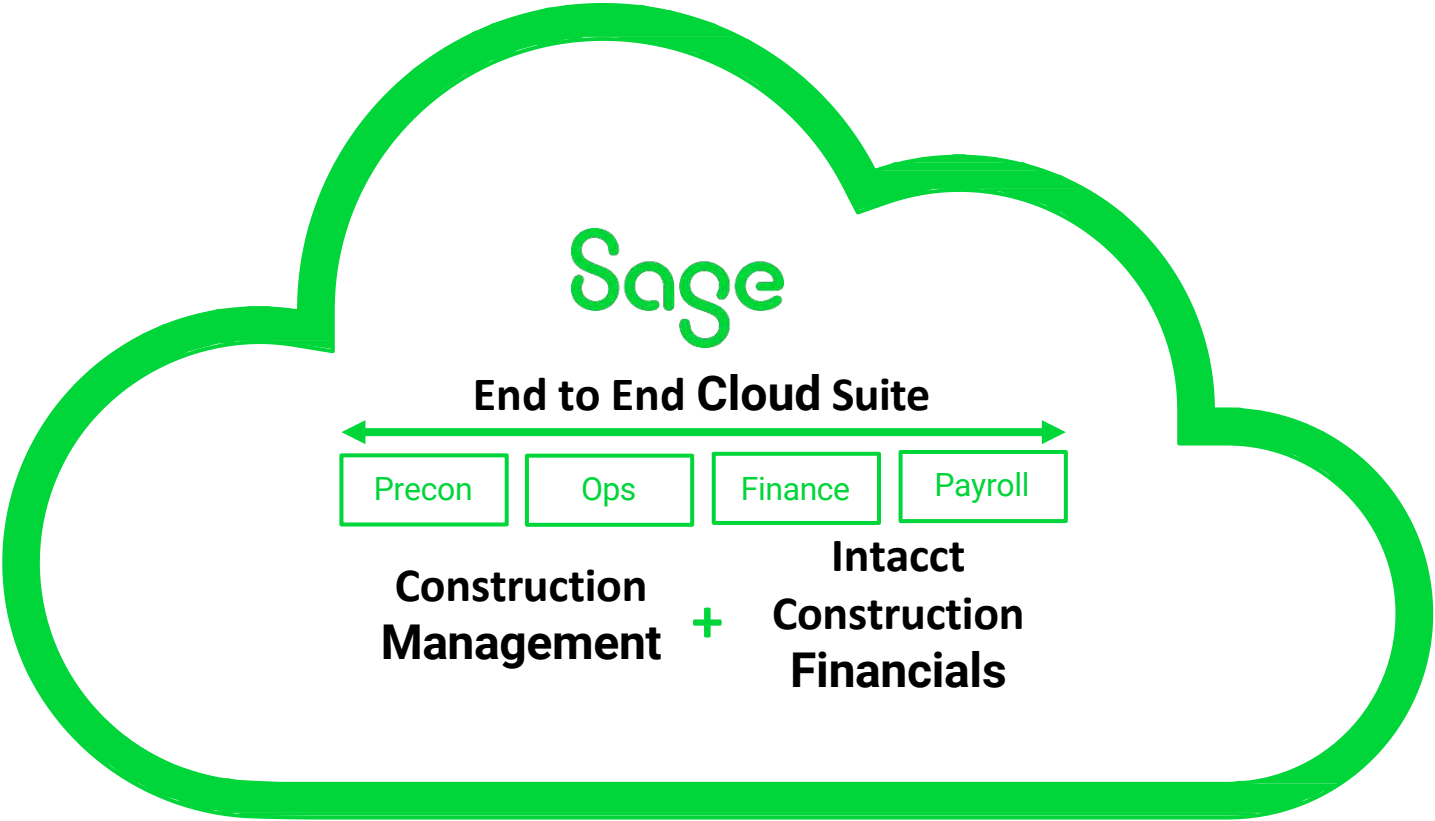


Slice & dice on-demand

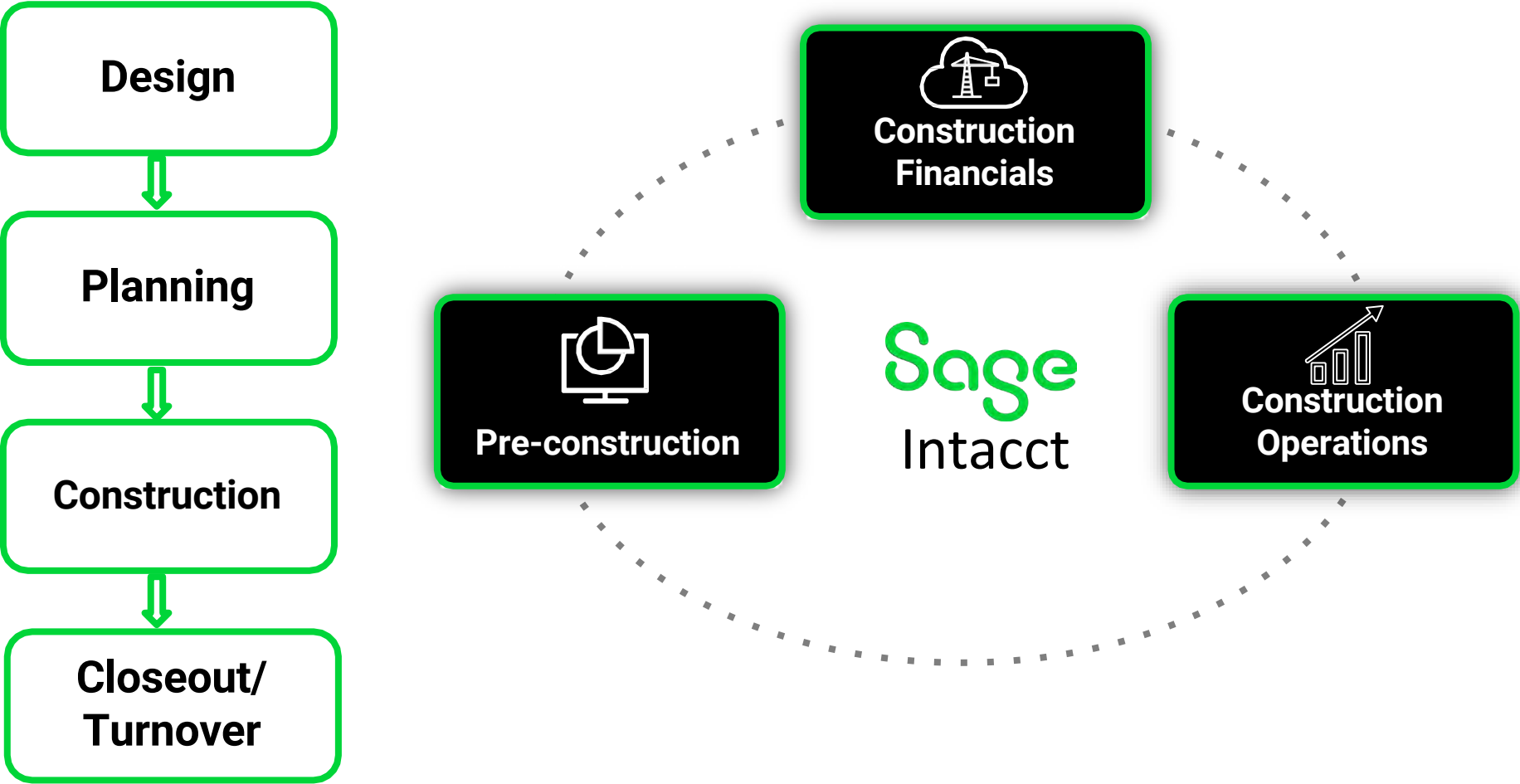


Sage Construction Management Overview

Sage Intacct for Construction



Construction Project Lifecycle

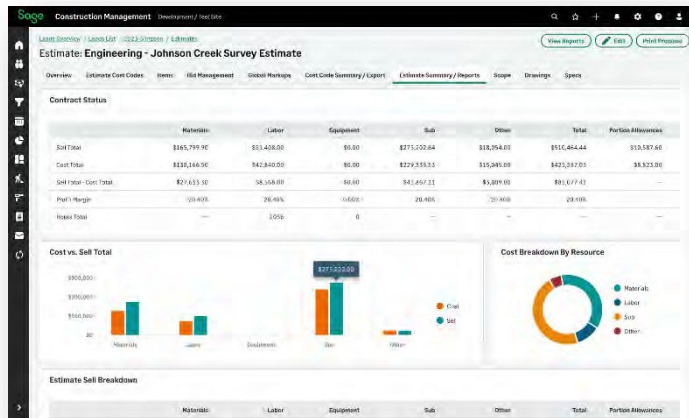


Sage Construction Management

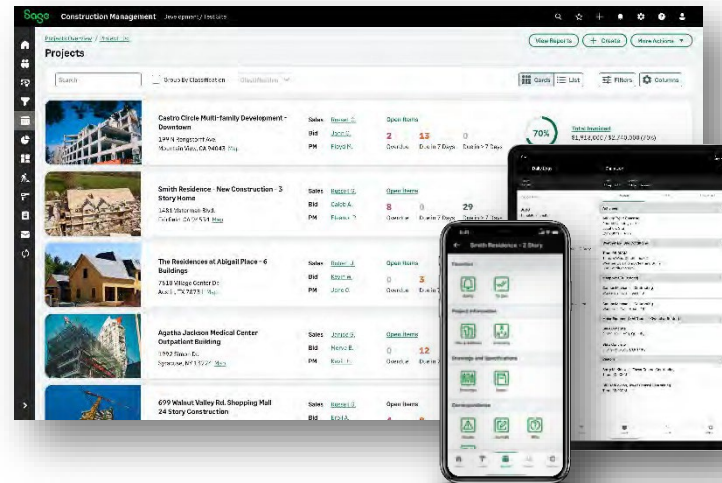
Streamline Your Construction Operations

Win more business & efficiently deliver projects on time and on budget

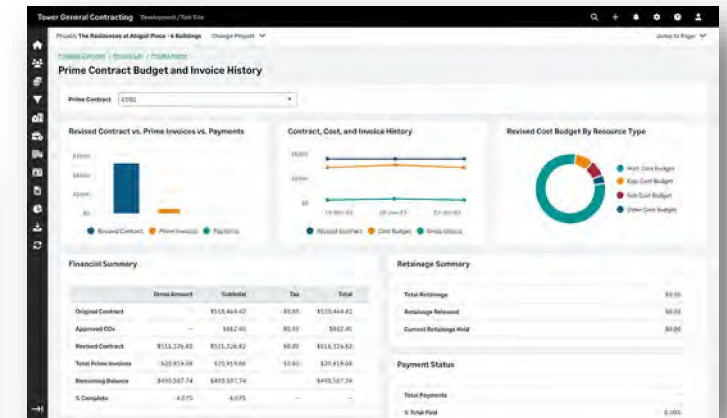
Preconstruction



Project Management



Project & Financial Insight



Collaborate & align all stakeholders within and across company boundaries

Sage Construction Management

Modern cloud platform

Streamlines your project operations on one modern cloud platform

Built for collaboration & mobility

Connect all stakeholders in construction, within and across company boundaries

End-to-end suite for construction

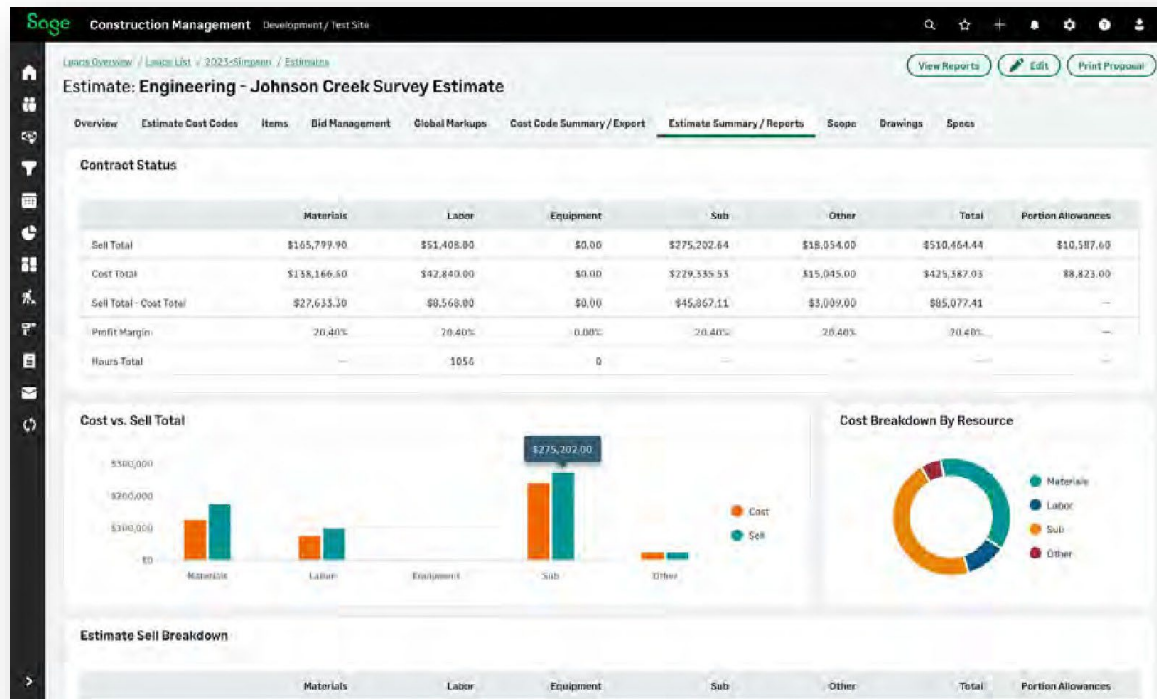
Combine with Sage Intacct Construction Financials for end-to-end suite for construction to maximize project profitability



Sage Construction Management

Preconstruction

Manage leads from bids and estimating to awarded projects



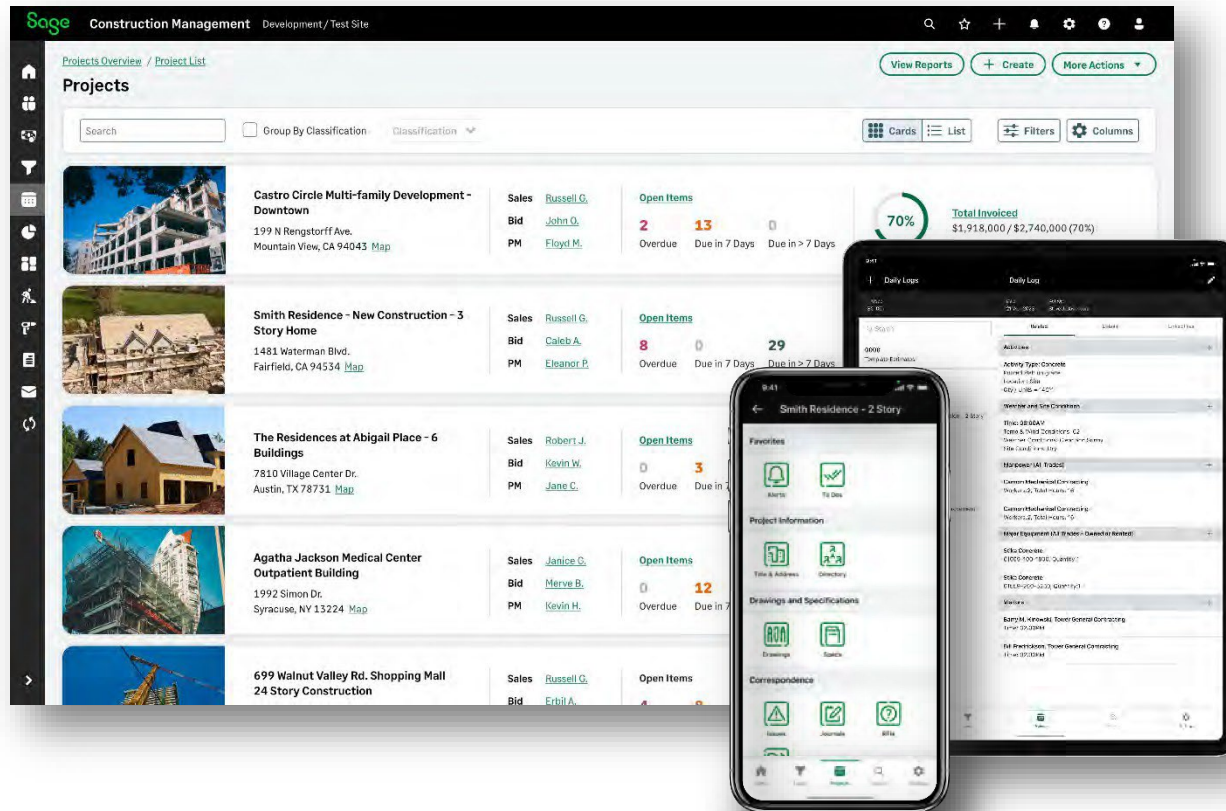
Win new business

- Contact & lead management
- Drawings & specs
- Estimating/takeoff
- Bids (ITB/RFP)
- TeamLink partner portal

Sage Construction Management

Project Management

Connect field and office teams, anytime/anywhere, to efficiently execute projects



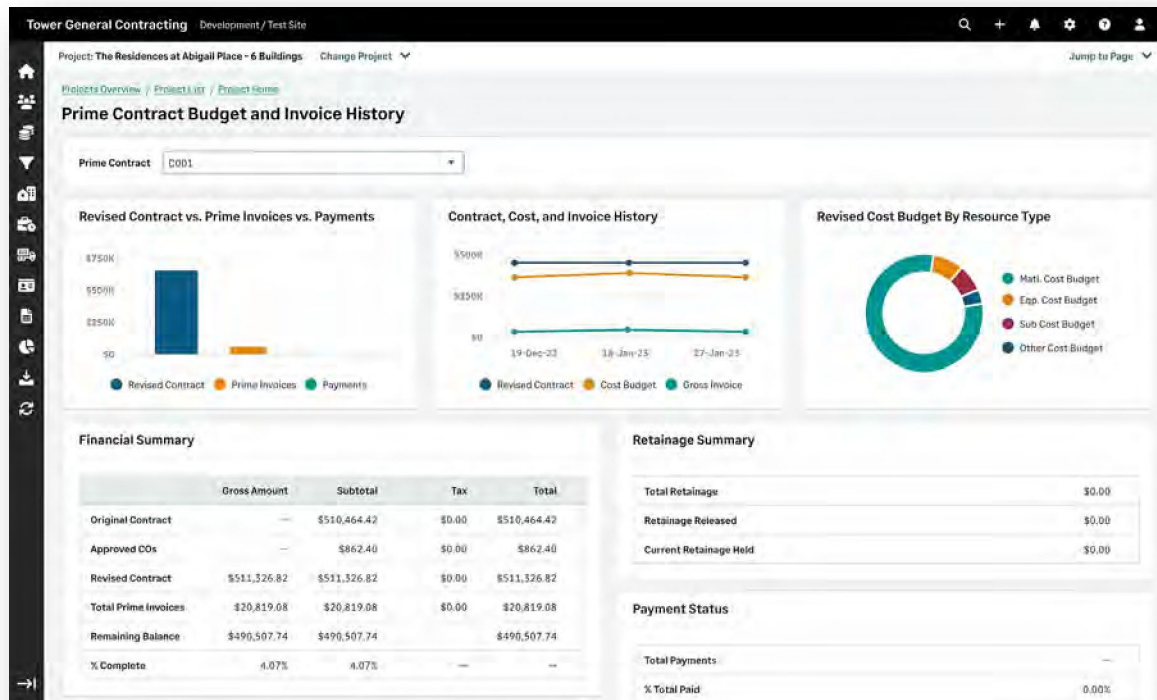
Build on time, on budget

- Projects, contracts, change orders
- Scheduling / activity management
- Field productivity
- Collaboration & document control
- Quality control & safety

Sage Construction Management

Project & Financial Insight

Align operational and financial teams to improve job profitability



Empower informed decisions

- Projects 360 view
- Streamlined operations and finance workflow
- Integrated financial insights
- Extensive pre-built reports & dashboards
- Reporting and analysis tools

Built for Collaboration & Mobility



Internet
Browser



Mobile App
iOS/Android

Anytime, anywhere access



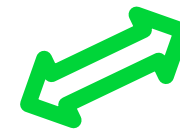
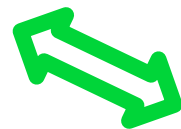
External project
team members
(portal for
customers, vendors,
subs.)

TeamLink Portal



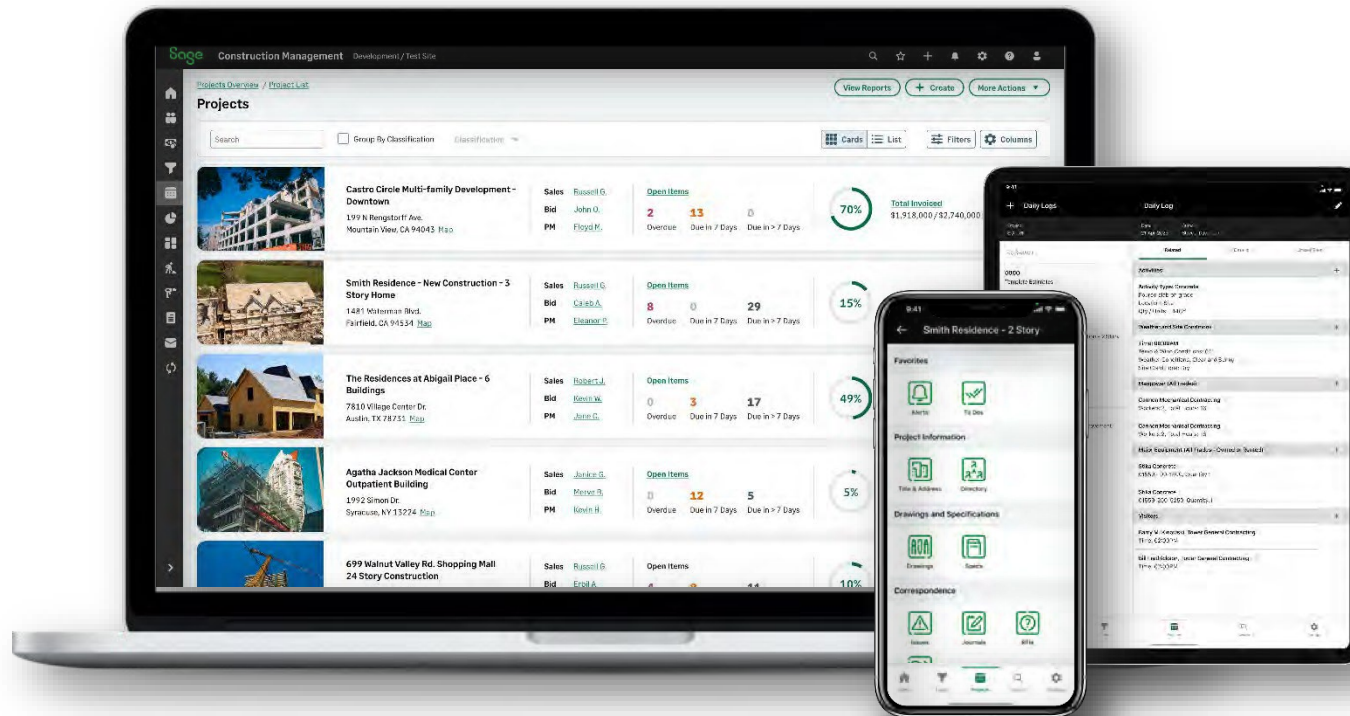
Finance team
members
(streamlined workflow
& collaboration)

**End to End Suite for
Construction**



Anytime, Anywhere Access

Connect field and office to maximize productivity



- Construction time capture
- Daily reports including photos & videos
- Project details
- Field productivity reports
- Quality Control & Safety reports

Browser | Apple iPhone & iPad | Android phone & tablet

TeamLink Portal

Enable collaboration across company boundaries

Tower General Contracting TeamLink Portal

RFP Package

Summary

Lead: 240 — Mountain High Condominiums

RFP Package: 2100 — Foundation

Estimate #: 001

Issue Date: 12-May-2023

Response Due Date: 31-May-2023

Response Due Date: 10:30AM

Bid Captain Information

Contact: Barry M. Kinoshita

Company: Tower General Contracting



Address: 509 Park Avenue, Suite 1400
San Jose, CA 95110

Email: barry@towergeneral.com

Bidder

Company:	Darwin Pierce Construction	Date Invited:	15-May-2023	Last TeamLink Login:	13-May-2023
Contact:	Darwin Pierce	Date Responded:	15-May-2023	Last TeamLink Update:	—
Phone:	(408) 819-2910	Overall Bid Status:	Bidding		
Email:	darwin@dpconstruction.com				

Bidder Items

Item #	Description	Quantity	Unit	Unit Price	Total Price	
96	Form, Rebar and Pour Footings	1	L.S.	—	\$0.00	
97	Form, Rebar and Pour Slab On Grade	1	L.S.	—	\$0.00	

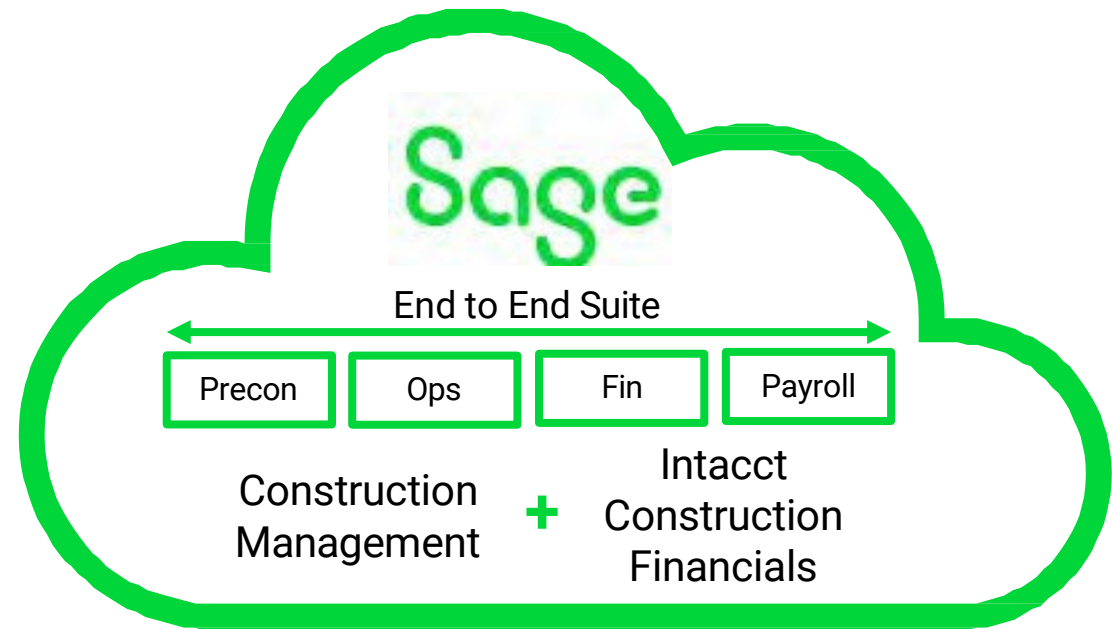
- Unlimited log-ins for outside team members
- Security setting to grant access as needed
- Updated in real-time

End to End Suite for Construction

Align operational & financial teams to improve job profitability

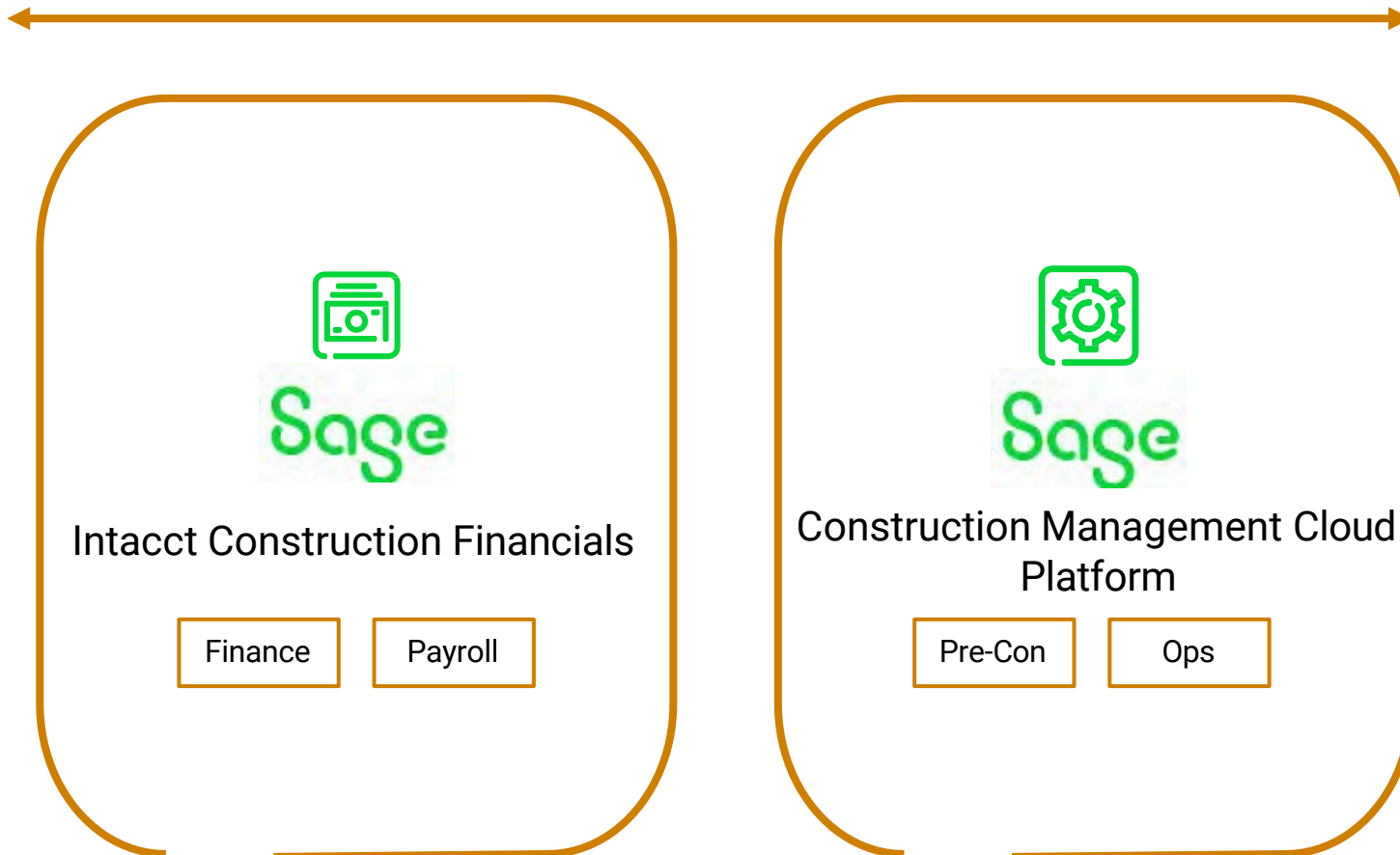
Streamline workflow & enable collaboration

- Account & Contact Management
- Awarded Projects & Contracts
- Procurement / Subcontracts
- Change Management
- AR/AP invoicing & payments



Accounting Link Utilities

End to End Suite



or

Options to integrate with other accounting/ERP solutions

- Intuit QuickBooks Pro, Premier, Enterprise (US, Canada, UK)
- Intuit QuickBooks Online (US, International)
- Xero (Global)
- Sage 50 (Canada)
- Sage 100 Contractor
- Sage 300 Construction & Real-Estate

Sage Construction Management Features

Estimating

- Document Leads (Opportunities)
- Upload drawings and specs
- Invite subs and suppliers to bid (ITB)
- Prepare estimates
- Prepare RFP packages
- Track Lead status using stages
- Lead analytics

Project Management & Field Staff

- Contract administration
- Procurement
- Timecards & miscellaneous expenses
- Project financial analytics
- Correspondence
- Documentation
- Quality control & safety
- Scheduling

TeamLink Portal

- Client, sub, and architect collaboration

Accounting

- Contract administration
- Procurement
- HR, timecards, & Misc. expenses
- Project financial analytics

Accounting Link

- Sync customers, vendors, employees
- Export project transactions
- Import payment status information

Accounting system

- Payroll
- Payments
- Deposits
- Reconciliations
- Corporate financial reporting



Next webinar in series

- Sage Intacct Real Estate
- October 16 / 1 to 2 PM ET





Thank you for attending
Additional Questions?

Reach out to us!

Experts@armanino.com

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