Sage Construction and Real Estate Software Selection Guide

Buying software to run your construction or real estate business is one of the most important investments you'll make. If handled properly, your purchase can pave the way for stronger decisions, improved efficiency and collaboration, and increased profits.

Making the right buying decision requires careful evaluation to find a solution that will fit your company for the long haul. To help, here's a guide that outlines what to consider before signing on the dotted line, as well as an overview of Sage solutions.

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Fit and function

Start by documenting your business needs and requirements. Next, determine what's holding your company back today. Where are the bottlenecks and breakdowns? Make sure to consider all angles — including process workflow, analytics, operations, mobility, accounting, procurement, client experience, etc. Identify the financial impact that these shortcomings are having on your company and projects. Then, rank them in order of importance.

Be transparent throughout the process, and include key stakeholders in these discussions. Invite end users, executives, financial decision makers, and IT personnel to the table. Pay close attention to topics like usability, product scalability (to support more users and revenue), and the software's ability to sync with other products you're using today or might use in the future.

Questions to ask

• What challenges are most prevalent with our current software?
• What do I need new software to do?
• Who will use it most and for what?
• Where will it be used?
• What systems need to be integrated?
• Can it help me eliminate the need for other applications?
• What data and information need to be collected?
• Is there room for growth?
• Does the software require customization?

Usability and adoption

How easy or difficult software is to use will have a direct impact on adoption. The software's interface should be intuitive and fast. Employees — especially digital natives who've grown up with technology — are accustomed to pleasing consumer experiences across Facebook, Uber, and Spotify. They bring similar expectations to the workplace.

Make sure to involve people who will be using the software daily to attend meetings. Encourage flexibility and open mindedness, as employees may be resistant to change.

Questions to ask

• Is the software easy to learn and use?
• Will I have to jump around between multiple windows and systems?
• Does the product have good peer reviews and testimonials?

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Price and budget

Once you've established a list of the features that are most important to you, it's time to determine your budget. Keep in mind the problems that you're facing with your current software and pencil out what those problems are costing you on a recurring basis.

Consider costs beyond the sticker price. Evaluate the full spectrum including implementation, support, maintenance, hosting, upgrade fees, and training. Any required process changes should also be considered, but recognize that just because you've been doing something the same way for many years, doesn't mean it's the best way.

Questions to ask

• Will I need to buy other applications to fill in capability gaps?
• Are there implementation and training costs?
• Are there support and maintenance costs?
• Will there be integration costs?
• Are there per user costs?

Implementation and training

Just like any construction project, your software implementation should follow a well-thought-out plan, complete with a schedule. As you evaluate software publishers, consider whether they have regional consultants available to guide your personnel through the sequence of events and training that need to occur for the new system to be implemented successfully.

During this transition, your employees will be learning a new system while continuing to maintain their current system and day-to-day activities. With the right guidance, this does not have to be a major disruption to your business.

Questions to ask

- How long will it take to implement?
- Will I need to invest in additional infrastructure?
- What training is available?

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Publisher commitment

When you buy construction software, it's not just an investment in the product itself. Your purchase also connects you to the software publisher for years to come. As you evaluate products, verify the publisher is reputable in the construction space and has your back.

A strong software package will typically have a large user base. Why? Because solutions that have large user communities typically have built-in functionality based on feedback provided by users over a long period of time.

Questions to ask

• How frequently are enhancements or new features launched?
• What would happen if they acquired no new customers for a year?
• Does the publisher have customers similar to my company?
• How large is their customer base?
• How innovative is the solution, compared to others on the market?
• What are the software publisher's support hours?

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Sage Construction and Real Estate

"An end-to-end cloud system that boosts efficiency across the business, from initial lead through project completion. I've been looking for this for 20 years."
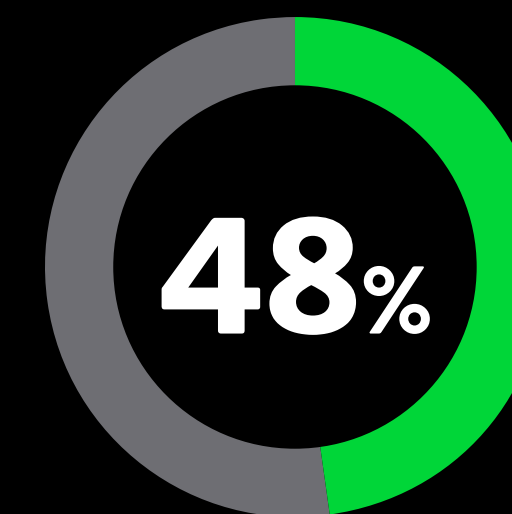
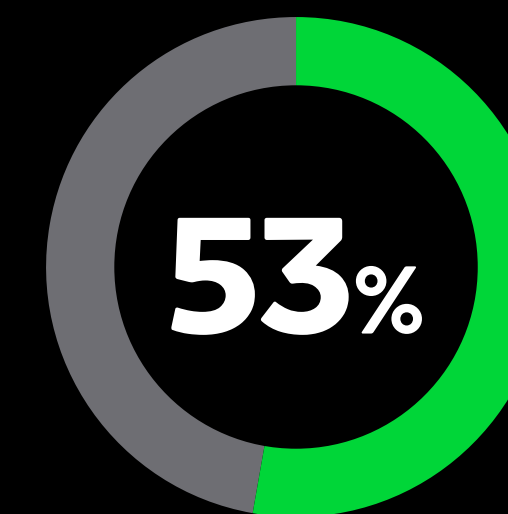—Joe Murray, CEO, ACT Construction

Now that we've covered what to think about during your exploration process, let's dive into Sage Construction and Real Estate. With a legacy of leading construction technology, we understand the issues companies face today, and are poised to tackle the challenges of tomorrow.

Sage offers a complete native-cloud construction suite with preconstruction, operations, and financial management solutions, plus integrations with other popular software so you can work more efficiently and scale your business.

Coupled with our trusted partner network — the largest and most experienced in the construction industry — you can feel confident you're choosing a software solution that delivers the critical capabilities, flexibility, and support you need to thrive.

48%

48% of the ENR Top 400 contractors use Sage

53%

53% of the BD&C Giants Top 115 contractor firms use Sage

More than

50,000

construction companies rely on Sage

Preconstruction solutions

Accelerate estimating, streamline bid management, and reduce risk with Sage preconstruction solutions. Whether you're tracking new opportunities, putting together detailed estimates, or ramping up for construction, you're armed with what you need to get things off the ground.

- **Optimize your sales strategy** and forecast revenue potential with centralized lead and opportunity tracking.

- **Improve project estimation accuracy** with AI-powered digital takeoff and estimating tools.

- **Save time and crush bid day** with sophisticated bid analysis tools, and easily convert won bids into projects.

- **Precisely plan and staff your jobs,** and monitor all opportunities including related proposals, estimating, and bid activities.

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Preconstruction solutions

Featured products

Sage Estimating
Smarter, automated estimating software trusted by top construction companies for over 30 years that streamlines bidding, increases accuracy, and helps you win more contracts.

Sage BidMatrix
The leading cloud-native bid analysis tool integrated directly within Sage Estimating, so you can compare subcontractor bids, evaluate project risks, and optimize bid strategies for greater success.

eTakeoff Dimension
A powerful, AI-driven takeoff tool that accurately quantifies materials and quantities from project drawings, reducing manual errors and improving estimation accuracy.

Sage Construction Management
End-to-end construction management software with deep lead management capabilities that allow you to track lead status, history, and activity to prioritize the most promising opportunities.

Operations solutions

Whether you're overseeing construction projects, coordinating field technicians, or managing properties, our operations-focused products will fuel your team and business.

• **Efficiently set up and manage projects** from contract to completion by connecting project teams, managing tasks, and collaborating anytime, anywhere, and from any device.

• **Streamline field-to-office communication** with mobile tools that enable your field team to focus on project excellence.

• **Increase productivity** by tracking and managing schedules, punch lists, project tasks, equipment, labor, deliveries, submittals, RFIs, and more.

• **Take control of the complexities** of property, lease, tenant, and unit management using real-time data.

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Operations solutions

Featured products

Sage Construction Management
End-to-end software that handles every aspect of construction management, enabling you to deliver projects more efficiently, reduce risk, and maximize profitability.

Sage Intacct Real Estate
Cloud-based property management and accounting software designed to help you simplify processes and maximize net operating income.

Sage Field Operations
Software for service-based contractors that connects the field to the office, improving productivity with an up-to-date picture of crucial metrics like average repair time, technician utilization, and customer satisfaction.

Finance solutions

Take control of the financial health of your business and projects and start making confident, data-driven decisions with industry-leading finance software. With features designed to meet the demands of construction, you can spend less time on administrative tasks and more time building.

- **Maximize profitability** with comprehensive job costing capabilities, and track all costs including labor, materials, equipment, subcontracts, and more.

- **Make financially sound decisions** with real-time visibility into data available anytime, anywhere, and from any device.

- **Simplify complex construction processes** like billing and payroll with tight integrations.

- **Increase efficiency and accuracy** with automated WIP management, eliminating the need to work in separate spreadsheets and allowing you to maintain cash flow and compliance.

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Finance solutions

Featured products

Sage Intacct Construction
The first native-cloud financial management solution for the construction industry, providing real-time visibility into the financial health of your projects to make confident, data-driven decisions.

Sage 300 Construction and Real Estate
Formerly known as Timberline, this longstanding on-premises product is the market leader in end-to-end construction finance and property management software.

Sage 100 Contractor
An ideal step-up for small companies using Excel or other generic accounting software, this on-premises solution provides easy access to job cost and project management information.

Sage Intacct Construction Payroll
Whether you need in-house or outsourced payroll, we offer construction-specific solutions that will meet your complex payroll needs.

The power of choice and flexibility

Versatile integrations

While our end-to-end suite delivers the most complete solution on the market, we understand that software isn't one size fits all. That's why we're committed to being an open platform and continuing to grow our ecosystem of partner solutions — like Procore, Autodesk, TimberScan, and others — that integrate with the Sage construction suite.

Our priority is to provide the power of choice — the simplicity to choose Sage's all-in-one solution, and the flexibility to select the right mix of integrated products that makes sense for your business.

Add-ons that pack a punch

We're proud to offer an array of integrated add-on products so you can customize your solution even further. Below are just a few of the many add-ons available:

Sage Paperless for Construction
An intelligent, automated cloud-based or on-premises solution that imports, indexes, routes, and stores documents in one secure place.

Sage Intacct Planning
A powerful cloud-based business planning tool that offers budgeting, forecasting, what-if scenario modeling, reporting, and data visualization.

GCPay
A web-based platform that manages the subcontractor pay application process.

Other
Fixed Assets, Dynamic Allocations, Multi-entity, Consolidations, and Inventory.

Where can you buy?

We get it — taking the leap to invest in new software can feel overwhelming. Having a partner that understands how you do business is key to ensuring your success. We sell our products through our network of value-added, locally-based, independent partners, rather than mass merchants, and we're proud to have built the largest and most experienced partner network in the construction industry. What advantages do our partners provide to you? For starters:

- All our partners have extensive experience in the construction industry, which means you'll have experts by your side who have worked with companies just like you.
- They can offer fast, professional, local service if the need arises.
- They'll help match your business with a solution that best addresses your current and future needs.
- They can provide on-going consultation and value-added services.
- They enable you to support a local business.

To find a value-added partner:

Call: 877.979.5462

Email: info@swktech.com

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What training and support is available?

Sage training covers a broad range of topics to ensure your workforce gets up and running quickly with maximum productivity. Courses are available in three formats:

- Anytime Learning: Prerecorded, online training available 24/7
- Real-time Learning: Live, online, virtual classroom environment
- Replay Learning: Recordings of previous live online classes available anytime

Training topics include:
- Construction accounting and job costing
- Contracts and billing
- Estimating fundamentals
- Project management
- Purchasing and inventory
- Service receivables and service management
- Custom report and form design, including Crystal Reports financial statement design
- Year-end procedures

Technical support
We offer a variety of support plans that can be tailored to meet your specific needs. Services include phone and chat support with a support representative, online access to Knowledgebase, and peer-to-peer community.

Join over 50,000 construction companies who trust and rely on Sage.

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