

# Sage 100 Contractor

sage





# See what you've been missing.

Sage 100 Contractor is software built for the type of work you do: construction. It handles critical tasks like estimating, job costing, managing projects, and running payroll with ease. With Sage 100 Contractor, your business can achieve something truly unique. You and your employees can gain the visibility you

need to take decisive action and seize every opportunity to improve profits. 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**



**Running  
the office**



**Managing  
construction**



**Providing  
excellent  
service**



# Overseeing the business

A construction company—your company—must be profitable to survive. As the owner, the pressure is even stronger because so many count on you to effectively lead and 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 his or her specific role—whether it's creating estimates, 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.



Click to learn how this owner addresses his daily business challenges:



Owner



Home



# Owner



Tom needs visibility into the whole organization to make sure no important decisions are delayed, impacting 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 an at-a-glance dashboard that show 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 on a **moment's notice**.

## Improved communications unite the team.

When he meets with customers, lenders, subcontractors, or other team members Tom also has mobile access to key **project status information** and project documents through his smartphone or tablet using Sage Construction Anywhere. Tom still makes a point to visit job sites often, but now he's better prepared to ask the right questions and raise the right issues while he is on the move.



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 reflect 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 health.

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

#### **Resources**

- ▶ [Sage 100 Contractor demo](#)
- ▶ [Sage Construction Anywhere demo](#)
- ▾ [Five reasons to move from QuickBooks](#)
- ▾ [Sage 100 Contractor Reports](#)

#### **Customer success stories**

- ▶ [Fatboy Construction](#)
- ▶ [J.F. Cook Company, Inc.](#)





# 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.



Click to learn how these individuals address their daily business challenges:



Controller



Bookkeeper



Home

# 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 knew how much was 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 literally just click a button and view the most current data. He also can review a **dashboard** each morning to immediately see what may need his attention that day, such as dropping bank balances and 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 Construction Anywhere**, 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 at any time see the remaining budget 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.**

Information is no longer keyed for a second time, last-minute reports created under high pressure, or 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.

**It feels good to stay ahead and make proactive, informed decisions.**

**Resources**

- ▶ [Sage 100 Contractor demo](#)
- ▶ [Sage Construction Anywhere demo](#)
- ▾ [Five reasons to move from QuickBooks](#)
- ▾ [Sage 100 Contractor Reports](#)

**Customer success stories**

- ▶ [Fatboy Construction](#)
- ▶ [J.F. Cook Company, Inc.](#)





# Bookkeeper



The effort to change over to new accounting software paid off in big, unexpected ways for Maggie.

Maggie is an exact type of person. 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 off-the-shelf accounting software and spreadsheet methods. She could see the value of having finances and operations managed together using a single integrated solution, but any new software would be an 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. They provided her with the resources and help she needed to transfer information from QuickBooks and disparate spreadsheets into Sage 100 Contractor. They also identified a variety of training options for Maggie so she could become familiar quickly with the software. After she started to use the software and had a question, she could connect online or by phone with a Sage support expert—someone who specifically supports 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 physically reconcile her job cost totals to her financial records. They always balance with each other! Also, she no longer needs to react to last-minute requests from management or the field to create special reports, or gather the latest



Home



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 payrolls](#), 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 away from her family.

**With everything organized and accurate, she can trust she's on top of her work.**

## Resources

- ▶ [Sage 100 Contractor demo](#)
- ▶ [Five reasons to move from QuickBooks](#)
- ▶ [Sage 100 Contractor Reports](#)

## Customer success stories

- ▶ [Fatboy Construction](#)
- ▶ [J.F. Cook Company, Inc.](#)





# 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.

Click to learn how these individuals address their daily business challenges:



Estimator



Project manager



Foreman



# 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 knew he navigated 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, simply 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. He now knows how much everything on a project really costs so the team can improve a 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 Construction Anywhere** on their mobile devices to submit their payroll **time**, Greg found 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 estimating software specifically designed for construction, Greg now has full confidence in his estimates. He can create faster, more precise estimates, resulting in more jobs. 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.

## Resources

### Sage 100 Contractor

- ▾ [Sage Estimating overview](#)
- ▾ [Sage Estimating sales sheet](#)
- ▾ [Sage 100 Contractor Document Control](#)
- ▾ [Sage 100 Contractor Reports](#)

### Sage Construction Anywhere

- ▾ [Sage Construction Anywhere overview](#)
- ▶ [Sage Construction Anywhere demo](#)

### Customer success stories

- ▾ [Dean Crowder Construction](#)
- ▶ [Fatboy Construction](#)
- ▶ [Smith Heating and Air Conditioning](#)





# Project manager



Nick understands that a project's profitability sometimes 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 fast, 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 financially where things stood was difficult and definitely could not be done on a daily basis. Besides 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 guys on the site would choose to go ahead with an unapproved change order to keep production moving, but doing so would put billable work at risk.

## 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 view [job progress reports](#) by easily clicking on a screen, 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: greater confidence in knowing exactly where the project stands at any given moment. Now, Nick has the visibility he needs to make better decisions for business 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 is sure to catch potential issues before they become true problems. When away from the office, he can easily use his mobile phone or tablet with [Sage Construction Anywhere](#) to instantly share the [latest project information](#)—drawings, documents, and site photos—with everyone on the project team.

Nick has new confidence that everyone is using the latest information to move his or her 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 employee [time](#) worked from the field using mobile devices 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, by job, on a daily basis.

**Making the kind of decisions to keep the job on track and in the black was never easier.**

## Resources

### Sage 100 Contractor

- ▾ [Sage 100 Contractor Document Control](#)
- ▾ [Sage 100 Contractor Reports](#)
- ▾ [Sage Estimating overview](#)
- ▾ [Sage Estimating sales sheet](#)

### Sage Construction Anywhere

- ▾ [Sage Construction Anywhere overview](#)
- ▶ [Sage Construction Anywhere demo](#)

### Customer success stories

- ▾ [Dean Crowder Construction](#)
- ▶ [Fatboy Construction](#)
- ▶ [J.F. Cook Company, Inc.](#)





# Foreman



Yesterday's downpour, a late arrival of materials, or an equipment breakdown. Each new disruption could have significant consequences on Jose's deadlines.

In overseeing each job, Jose's days were filled with activities like calling the office for a delivery status, reviewing paper reports, or digging through bulging project binders to find the latest approvals and instructions—all in addition to managing his crew. Someone always needed something from him, and many days, especially after a jobsite disruption such as sudden weather, felt chaotic.

Sometimes it would take just too much time to track down information or confirm his recollection against documents scattered across different places. But the lack of easily available information could result in some costly mistakes. With so much to keep track of, and project

information difficult to corral and sometimes spotty, Jose and his team spent a lot of time moving forward on the job based on assumptions rather than facts. They sometimes missed opportunities for creating and billing change orders, and the need for rework if their assumptions were wrong caused project delays and increased costs.

## Going to one place for project information seemed almost too easy.

After the company started using Sage 100 Contractor with [Sage Construction Anywhere](#), jobsite challenges started to smooth out. Jose can now get to the information he needs to oversee each day as he walks the site while using his tablet or smartphone, making it easy for him and

his crew to quickly confirm that they are on the right track—right where they are working. He can also easily upload daily site [photos from his phone](#) and tie them directly into the job's online [project files](#), so everyone on the team and back at the office knows exactly where the project stands at any moment in time.

Before, Jose was the only one who could get to the job information needed to direct the crew. Now team members can use their own smartphones or tablets to securely access their own project drawings, documents, and more to get clarifications as they work, keeping the project moving and letting Jose focus on other items needing his attention.





### No more unnecessary office trips.

Reporting field time has also become much easier for Jose. Many of his team members use a mobile app on their phones to enter their own **time** for each type of work they do each day, and Jose can quickly review, approve, and submit time on behalf of any employees if needed via his own tablet. When working out of cell range, the time entries are saved and transmitted as cell range becomes available. With quicker and more accurate time reporting, labor costs are dropping as Jose and the project manager now have earlier visibility to how labor job costs are stacking up and can make corrections as the project progresses. Plus, helping Maggie, their

bookkeeper, on payroll has become more efficient. She can immediately access all the **payroll detail** needed so they can avoid eleventh-hour scrambling and ensure his team gets paid on time!

### Better information access and visibility means fewer project hiccups.

Because Jose now has instant access to all project information in one location and can confidently act knowing the information is the most current, he and his crew can focus on executing their work at the site. While he might not be able to control the weather or always speed up a material delivery, his new tools lessen his administrative hassle

and give him the information he wants so he can make the best informed decisions to keep things moving forward. He likes how responsive he can be to his team and how the easier pace gives him better moments to appreciate his team's accomplishments.

### Making decisions right at the site is the best place to be.

## Resources

### Sage 100 Contractor

- ▶ [Sage 100 Contractor demo](#)
- ▶ [Sage 100 Contractor Document Control](#)
- ▶ [Sage 100 Contractor Reports](#)

### Sage Construction Anywhere

- ▶ [Sage Construction Anywhere overview](#)
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### Customer success stories

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- ▶ [J.F. Cook Company, Inc.](#)





# 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. In other words, with Sage 100 Contractor, you're positioned to maximize your service productivity and effectiveness while providing excellent service to every customer.

Click to learn how these individuals address their daily business challenges:



Service manager



Technician



Home

Learn more at: [www.Sage100Contractor.com](http://www.Sage100Contractor.com)

# 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 the screens 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.

## Saving time all along the way.

As work is completed, technicians now can enter their labor hours from their mobile devices,\* and the information is automatically populated on the work orders for invoicing, and in payroll. This saves Maggie, their **bookkeeper**, the previous 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 their service capacity and enabling their technicians to provide excellent customer service.

### Bob has moved to a place of control and assurance.

## Resources

### Sage 100 Contractor

- ▣ [Sage 100 Contractor Service Receivables](#)
- ▣ [Sage 100 Contractor Inventory](#)
- ▣ [Sage 100 Contractor Equipment Management](#)
- ▣ [Sage 100 Contractor Reports](#)

### Customer success stories

- ▶ [J.F. Cook Company, Inc.](#)
- ▶ [Smith Heating and Air Conditioning](#)

\*Field service mobile devices use an authorized Sage development partner solution.



# 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 was isolated. 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** on his tablet 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.



After the work is complete, David hops back in the truck and checks his tablet 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.**

## Resources

### Sage 100 Contractor

- ▾ [Sage 100 Contractor Service Receivables](#)
- ▾ [Sage 100 Contractor Inventory](#)
- ▾ [Sage 100 Contractor Equipment Management](#)
- ▾ [Sage 100 Contractor Reports](#)
- ▾ [Sage Construction and Real Estate Development Partners](#)

### Customer success stories

- ▶ [J.F. Cook Company, Inc.](#)
- ▶ [Smith Heating and Air Conditioning](#)

\*Field service mobile devices use an authorized Sage development partner solution.





Learn more about how Sage 100 Contractor connects your business in ways no other solution can.

Visit: [www.Sage100Contractor.com](http://www.Sage100Contractor.com)

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