

Sage
Professional
Services



Sage Professional Services is a team of highly skilled professionals with an average tenure of more than 24 years' experience working in the construction industry and with Sage. This team is dedicated to providing services that are more complex and beyond the scope of traditional technical support, such as when a change in your business operations might require significant adjustments to your Sage software configuration.

Sage Professional Services can help you get more out of your software investment both in terms of productivity and profitability. All services are fee-based and include:

Key Changes

Finding and replacing all occurrences of the key fields based on the spreadsheet or criteria you provide. Companies often outgrow their initial setup and need a key change in order to keep the software working at optimal performance. Perhaps a naming convention was applied that no longer works, or numeric vendor IDs or GL accounts are no longer in proper order. Changes in your business might also drive the need for adjustments in fields like customers, employees, jobs, and cost codes.

Data Merges

Merging multiple data folders into one. The original setup might have been to put the data in separate folders, but due to business expansion or new processes, it now would be more feasible (and easier to use) if everything was stored in a single data folder. Most data merges also require key changes.

Data Splits

Separating a data folder that holds multiple companies. This could occur because some of the companies are sold or users can better access and view data for a particular company/location when it is stored individually.

Data modifications

When a change to data is not possible directly through the software or impractical by going record by record. Examples include: updating employee pay information (from monthly to biweekly for example), adding a new bank ID to AP distributions, changing the GL retrieval method in Job Cost, changing the accounting method from cash to accrual, removing unwanted data (like New.BLT transactions), changing GL period or fiscal end dates, and so on.

Dictionary Modifications

If your business is developing an external solution for which you need to amend or insert data in your current Sage database, you may find that you can't change the field or add the record because the data is locked down. Sage can modify dictionary files to make a record ODBC-creatable or a field ODBC-replaceable. A request form and legal documentation are needed.

External Data Merges

If your company has recently acquired an outside organization, you might need to merge data from the new organization into your current database.

Packaged Services

These include, MyAssistant Quick Start, Sage Construction Project Center on-boarding, Sage Service Operations on-boarding, Sage Paperless Construction implementation and training and Sage 300 CRE Health Check services.

Reporting Services

Our report design team will work with you to develop, test, and implement custom reporting requirements for your business needs.

Consulting Services

Helping clarify business processes, increase efficiencies, and more effectively manage key aspects of your operation. We can provide valuable insights to help streamline workflows, increase operational effectiveness, and drive profitability.

IT Services

Whether upgrading to the next version of software, or migrating to a new server environment, Sage consultants can provide valuable technical advice and support.

Contact us at Professional.Services@Sage.com with any questions.