

E-book

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.

Sage



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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 Meta, 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?



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?



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?



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.”

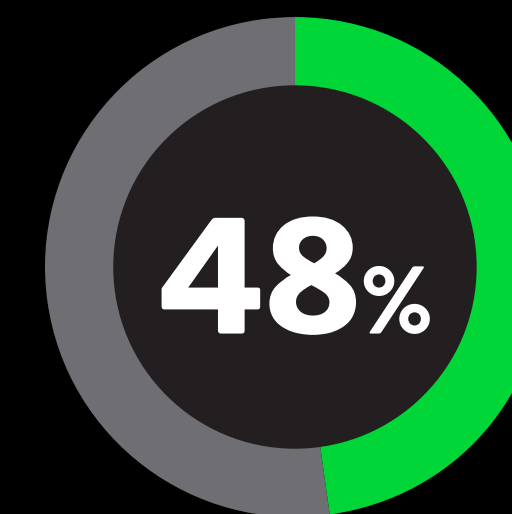
—Joe Murray, CEO, ACT Construction



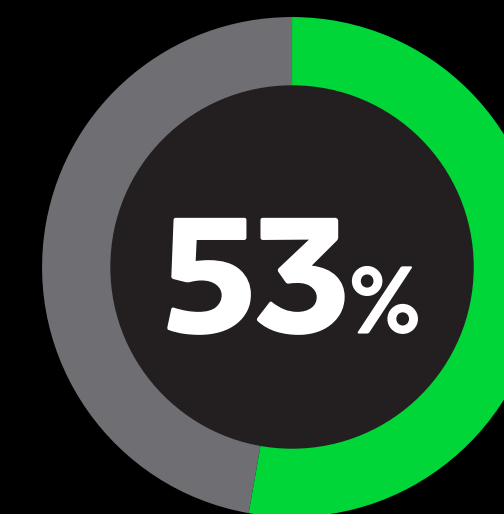
Now that we’ve covered what to think about during your exploration process, let’s dive into Sage Construction and Real Estate. With a legacy of leading construction technology, we understand the issues companies face today, and are poised to tackle the challenges of tomorrow.

Sage offers a complete native-cloud construction suite with preconstruction, operations, finance, and workforce 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% of the ENR Top
400 contractors
use Sage**



**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 estimation accuracy** with AI-powered digital takeoff, estimating, and bid insight tools.
- **Simplify bid day** with cloud-based bid leveling, subcontractor selection, and AI-assisted bid analysis.
- **Precisely plan and staff your jobs**, and monitor all opportunities including related proposals, estimating, and bid activities.



Preconstruction solutions



Featured products

Sage Estimating

Smarter estimating software trusted by top construction companies for over 30 years. Sage Estimating helps teams build accurate estimates, level subcontractor bids, evaluate risk, and award work with confidence. With flexible estimating workflows, cloud-based bid leveling, AI-assisted bid insights, and takeoff integration, Sage Estimating helps improve accuracy, reduce manual work, and win more profitable projects

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 lead and opportunity tracking to help teams prioritize pursuits, manage activity, and improve visibility from preconstruction through execution.

Operations solutions

Operational efficiency is the cornerstone of lasting success. 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, collaborating from any device, and keeping project documents and drawings organized in one place.
- **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, work orders, and more.
- **Take control of the complexities** of property, lease, tenant, and unit management using real-time data.



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.

- **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.
- **Use Sage Ai to make faster, more informed decisions** by helping teams surface project performance trends, understand financial risks, and act with greater confidence while keeping people in control.



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.

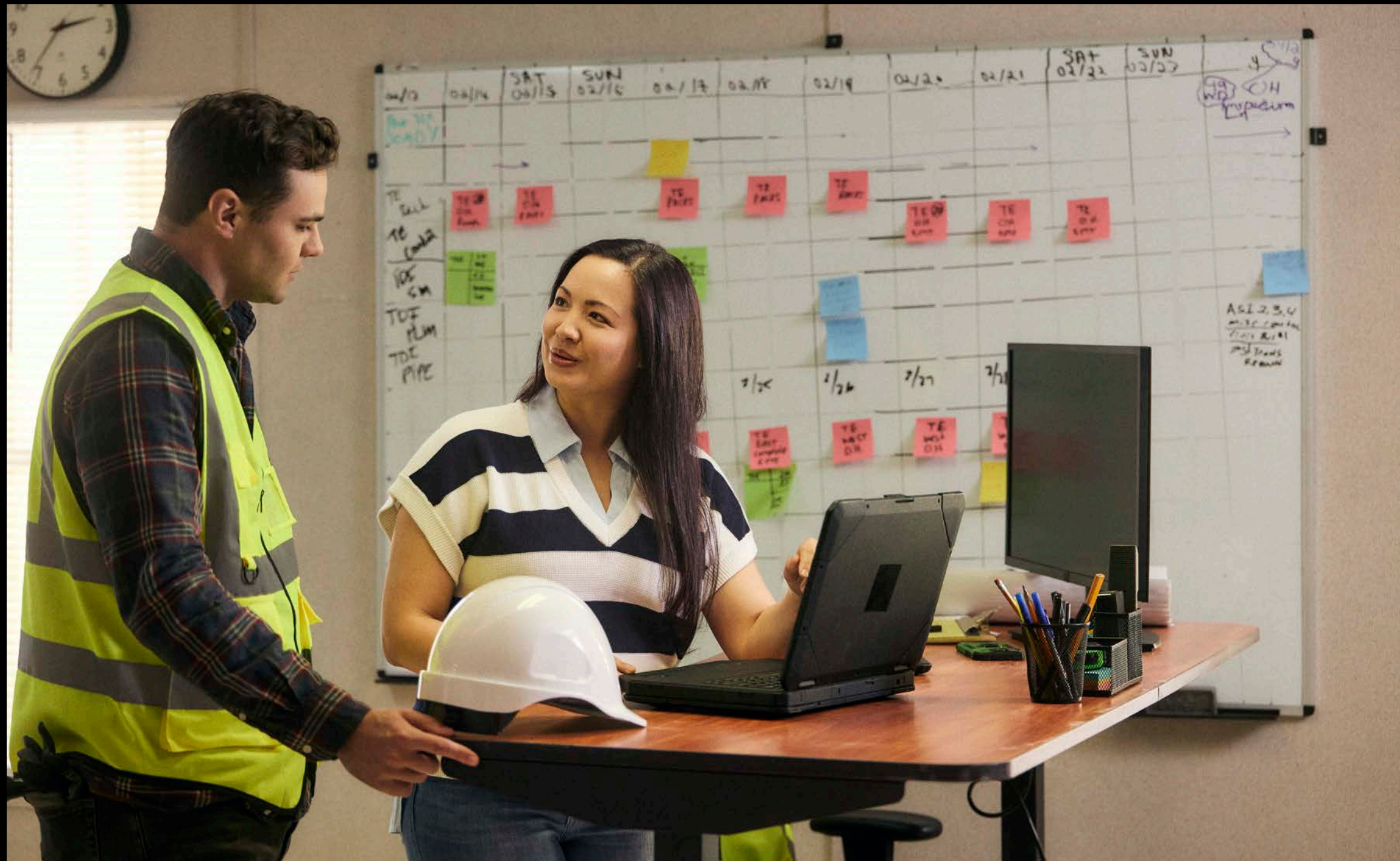
HR + Payroll solutions

Manage your workforce with connected HR and payroll solutions built for construction. Sage helps contractors streamline hiring, onboarding, payroll, compliance, labor tracking, and workforce management—while giving teams the flexibility to choose the solution that best fits their business.

- **Centralize workforce management** with tools for recruiting, onboarding, benefits administration, time tracking, and employee development.
- **Improve payroll accuracy and compliance** with solutions built to handle certified payroll, multi-state labor requirements, union reporting, and complex construction pay rules.
- **Connect field and office operations** with real-time labor data that flows seamlessly into project costing and financial reporting.
- **Gain flexibility and choice with** integrated HR and payroll solutions tailored to different operational needs, business sizes, and growth stages.



HR + Payroll solutions



Featured products

Sage HCM

A unified HR and payroll solution built for construction. Sage HCM streamlines payroll, time tracking, onboarding, benefits, compliance, and workforce management while improving payroll accuracy and connecting labor data directly to projects and financials.

ADP Workforce Now for Construction

An outsourced HR and payroll solution that helps contractors simplify payroll processing, tax compliance, workforce management, and employee self-service with scalable cloud-based tools.

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 200+ partner solutions — like Procore, Autodesk, 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

Integrated document management and accounts payable automation software that helps organizations capture, route, approve, and securely store business-critical documents.

Sage Expense Management

Card-agnostic expense software built to automate receipt collection, expense reporting, and credit card management.

Sage Intacct Planning

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

Other

Fixed Assets, Dynamic Allocations, Multi-entity and global consolidations, and Inventory.

Purpose-built packages for the entire industry

We’ve built comprehensive solutions designed for a variety of construction businesses all with Sage Intacct Construction – our cloud-native finance product – at their core to bring your business to new heights.

Embraced by construction businesses of all sizes and specialties, our products are designed to conquer your diverse and demanding needs.

Whether you’re a general contractor executing ground-up projects, a service-based contractor with field technicians, or a developer managing properties, we’ve got you covered.



Sage Construction Essentials

Designed for growing construction companies of all disciplines, this cost-conscious solution accelerates growth at the right price with a comprehensive suite of preconstruction, operations, and finance software.

Sage for Specialty Contractors	Sage for General Contractors	Sage for Real Estate Developers	Sage for Home Builders	Sage for Heavy Civil Construction
Cloud accounting	Cloud accounting	Cloud accounting	Cloud accounting	Cloud accounting
Construction + inventory management	Preconstruction + bid management	Construction operations	Preconstruction + bid management	Heavy civil operations + fleet management integration
Service + field operations	Construction management	Property management + lease administration	Construction management + client collaboration	

Add-on solutions

Preconstruction	Operations	Financial Management	HR + Payroll
Sage Estimating eTakeoff Dimension	Sage Field Operations* Sage Intacct Real Estate** ToolOps	Multi-entity Consolidations Fixed Assets Dynamic Allocations Sage Intacct Planning Sage Paperless Sage Expense Management	Sage HCM ADP Workforce Now for Construction

*Included in Specialty Contractor package
**Included in Real Estate Developer package

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: 800-628-6583

Email: product.info@sage.com

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.**

sagecre.com
product.info@sage.com
800-628-6583



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