

## **What project information is synchronized?**

- When you synchronize your Sage Construction Project Center site with Sage 300 Construction and Real Estate, your standard cost codes and categories are uploaded. This job reference explains how standard cost codes and categories, projects, and job cost codes and categories are used by the system. (For step-by-step instructions to configure synchronization, see the Sage Construction Project Center and Sage Bid Management Setup Guide.)

## **Synchronize at the organizational level**

- During initial install of the Sage 100 Contractor and configure synchronization with Sage 300 Construction and Real Estate, standard cost codes and categories are uploaded to the cloud automatically
- Go to Setup and click Advanced List Management

Setup

List Management

Advanced List Management

Bidder Categories

Org Project Options

User Groups

Integrations Setup

Performance Evaluation Setup

Org Bid Package Template


Org Bid Package Message Template

- Select the Cost Codes list. This list matches the Standard Cost Codes you have set up in the system, including the standard categories assigned to each. Notice that the list is defined at the Organizational Level.

Edit	Cost Codes	Advanced List
<b>List defined at the <i>Organization</i> level</b>		
Code	Division Description	Sort
> 01	GENERAL REQUIREMENTS	1
> 02	EXISTING CONDITIONS	2
> 03	CONCRETE	3
> 04	MASONRY	4
> 05	METALS	5
> 06	WOOD, PLASTICS, & COMPOSI	6
> 07	THERMAL & MOISTURE PROTEC	7
> 08	OPENINGS	8
> 09	FINISHES	9
> 10	SPECIALTIES	10
> 11	EQUIPMENT	11
> 12	FURNISHINGS	12
> 13	SPECIAL CONSTRUCTION	13
> 14	CONVEYING EQUIPMENT	14
> 15	MECHANICAL	15
> 16	ELECTRICAL	16
> 17	MINORITY SUBCONTRACTOR	17
> 21	FIRE SUPPRESSION	18
> 22	PLUMBING	19
> 23	HVAC	20
> 25	INTEGRATED AUTOMATION	21
> 26	ELECTRICAL	22
> 27	COMMUNICATIONS	23
> 28	ELECTRONIC SAFETY & SECUR	24
> 31	EARTHWORK	25
> 32	EXTERIOR IMPROVEMENTS	26
> 33	UTILITIES	27
> 34	TRANSPORATION	28
> 40	EQUIPMENT	29
> 90	SMALL JOBS	30
> 99	TAXES AND INSURANCE	31

*This list is controlled by an outside source and may not be modified here*

- Select the Cost Code Categories list. This list matches the standard categories set up in the system, and is also defined at the Organizational Level. Neither list can be edited in Sage Construction Project Center. Add any standard cost codes or categories in Job Cost (Setup > Standard Cost Codes or Standard Categories). New items will be uploaded to the cloud during the next scheduled synchronization.

Edit **Cost Code Categories**  Advanced List

**List defined at the *Organization* level**

☐

Code	Description	Allocation
E	Equipment	Equipment
L	Labor	Labor
M	Material	Material
O	Other	Other
OH	Overhead	Overhead
OT	Overtime	Labor
S	Subcontract	Subcontract
G	General	Overhead

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## Synchronize at the project level

- When you first configure a project to synchronize with Sage 300 Construction and Real Estate, the cost codes and categories associated with that job are uploaded to the cloud automatically.
- Go to Project Setup and click Advanced List Management
- Select the Cost Codes list. This list matches the Cost Codes set up for this job. Notice that not all standard cost codes have been added to the job. The list is defined at the Project Level.

Edit	Cost Codes	Advanced List
<b>List defined at the <i>Project</i> level</b>		
	Code	Division Description
>	01	Site Project Manager
>	02	Site Construction
>	03	Concrete
>	04	Masonry
>	05	Metals
>	06	Wood & Plastics
>	07	Thermal & Moisture Protec
>	08	Doors & Windows
>	09	Finishes
>	10	Cost Code 10001
>	11	Equipment
>	12	Furnishings
>	13	Special Construction
>	14	Conveying Systems
>	15	Mechancial
>	16	Electrical
>	43	General Design
>	75	Contingency
>	90	Site Manager Income
>	92	NR Equip Repairs
>	98	Warranty
>	99	Extra Estimates

*This list is controlled by an outside source and may not be modified here*

- Select the Cost Code Categories list. This list shows the list of all categories that have been set up for at least one cost code on the project. This list is also defined at the Project Level.

Edit
**Cost Code Categories**
▼
Advanced List

### List defined at the *Organization* level

<input type="checkbox"/>	Code	Description	Allocation
	E	Equipment	Equipment
	ER	Equipment - Rented	Equipment
	L	Labor	Labor
	LB	Labor Burden	Labor
	M	Material	Material
	O	Other	Other
	OH	Overhead	Overhead
	OT	Overtime	Labor
	S	Subcontracts	Subcontract

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## Add cost codes to a job

- When creating a commitment in Sage Construction Project Center, line items corresponding to existing cost codes and categories on the job can be added—or cost codes and categories can be added from the standard cost code list. In this example, cost code 09-260 Gypsum Board Systems has not been set up on the job yet
- Click Show Standard Cost Codes to select a cost code that has not yet been added to the job. (The button name changes to Show Project Cost Codes.)

Add New Commitment Cost Code

Extras Group
▼

Show Standard Cost Codes

Project Cost Codes
**01-0102 (Site Project Manager) Site Project Manager**
▼

Cost Code Category
**(L) Labor**
▼

Line Item Description

Retainage
0%

Cost Code Amount

Save
Cancel

- Save the commitment lines and click Request Synchronization. The commitment is sent to Job Cost and the new cost code is added to the job.