

Course Agenda

Class 4: Project Management

Sage 100 Contractor | Instructor: Max Duykers

Course Overview

In this class, you will become familiar with the Project Management functions – budgeting, job cost tracking, Document Control, and job reports. This class should be taken with classes 1, 2 & 3 in sequence.

This course is designed for project executives, assistant project managers, controllers, accounting staff, and bookkeepers who will be involved with managing and tracking jobs for your company.

Agenda

- Creating a Client
- Creating a Job
- Creating a Budget
- Creating a Vendor
- Creating a Subcontract
- Creating a Purchase Order
- Discussion of Interconnection between Project Management and Accounting
- Change Orders: Prime only, Prime/Sub, Sub only, Internal only
- Releasing AR & AP Retention
- Job Reports: Subcontract reports, committed cost reports, job cost reports, job status reports, bonding reports
- Gantt Chart Scheduling - brief overview
- Document Control - brief overview: RFI's, RFP's, Transmittals, Submittals, Daily Field Reports, Punch Lists, Hot Lists, Project Work Center