

Sage 300 CRE  
Online Conference

# Subcontracts and Subcontractor Compliance

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# Learning Objectives

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- Utilizing Commitments in Sage
  - Setup
  - Tracking in Accounts Payable
  - Inquiries and Reports
- Tracking Compliance
  - Features
  - Setup
  - Processing
  - Reporting

# Commitments

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- Setup:
  - JC Settings
    - Commitment
    - Forms
  - PJ Settings for Change Order Forms
  - Security Access for Document Designer
- Processing:
  - Commitments in JC or PJ
  - Document Designer to Create forms in MS Word
  - Change Orders : JC versus PJ
  - AP Invoice Entry
- Reporting

# Subcontractor Compliance

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- Features:
  - Lien Waivers
    - Conditional (typically before paid)
    - Unconditional (typically when paid)
  - Vendor Insurance
  - Certified Reporting
  - Miscellaneous (User Defined)
    - W9
    - Contract Licenses
    - Permits
    - Signed Contract

# Subcontractor Compliance

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- Setup:
  - Certified Reports Service
  - Custom Descriptions
  - AP Settings
  - Vendor Setup (Insurance / Compliance tab)
  - Job Setup (Job Compliance screen)
  - Commitments

# Subcontractor Compliance

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- Processing:
  - Warning Messages in AP
  - Lien Waivers
  - Managing Compliance Items (AP or PJ)
- Reporting

## Subcontract - Tips

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- Change Order entry depends on if you use PJ. If you have PJ, you need to enter the commitments and change orders in PJ module.
- Forms such as Subcontract and Lien Waivers can be modified with Crystal Reports.
  - Don't forget about Custom Fields if you need to add fields to print on forms.
- You can use the Send feature to Send Reports / Forms

# Recap

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- Utilizing Commitments in Sage
  - Setup
  - Tracking in Accounts Payable
  - Inquiries and Reports
- Tracking Compliance
  - Features
  - Setup
  - Processing
  - Reporting





# Resources

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- We appreciate your feedback!
- A link to the session recording will be sent to you.
- Visit our website for additional resources:
  - [Free Sage 300 CRE Procedure Guides](#)
  - [Free recorded Sage 300 CRE webinars and videos](#)

**Contact us:**

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[www.onpoint-software.com](http://www.onpoint-software.com)

**Thank you for being here!**