

Success Story

Tricorp Group builds on success

With Sage 300 Construction and Real Estate and Sage Office Connector

Tricorp Group, Inc. has built a solid reputation for managing successful projects—from small tenant improvements to multi-million dollar ground-up buildings. The company has been involved with high-profile ventures like the new UC Davis Schaal Aquatic Center, renovations at the California State Capital, and the construction of multiple major hotels and mixed-use urban in-fill projects.

With annual revenues of over \$40 million, Tricorp Group needs a robust construction accounting solution to keep projects on track



and profitable. For Tricorp Group, the solution of choice is Sage 300 Construction and Real Estate with Sage Office Connector.

Sage at the foundation

“We’ve used Sage 300 for years, and more recently added Sage Office Connector,” explains Sylvia Lamas, Tricorp Group’s controller. “Sage is really at the foundation of our accounting operation—everything builds off of it.” Sage Office Connector allows users to move data seamlessly between Excel spreadsheets and Sage 300. In addition, a query wizard within

Company
Tricorp Group, Inc.

Location
Sacramento, CA

Industry
General Contracting

Sage Products
Sage 300 Construction and Real Estate
Sage Office Connector
Procore



Sage

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— Sylvia Lamas, controller, Tricorp Group, Inc.

the solution speeds and simplifies users' access to live data. With dozens of preformatted financial and operations reports available through a familiar spreadsheet interface, Office Connector speeds and simplifies the generation of even the most complex reports.

Lamas says she routinely uses Office Connector to create quick queries. “I use the Query function to quickly search for a particular transaction, such as those of a particular dollar amount, or related to a specific vendor. It's fast, easy and accurate.”

Save months of manual data entry

Some of Tricorp Group's work is government-related and requires the company to file certified payroll reports. While Sage 300 supports certified payroll, one of Tricorp Group's customers required that the data be submitted in a specialized format, retroactively back to the start of the project. It appeared to be an onerous, labor-intensive task until the company's Sage business partner showed them a better way. Office Connector offers a template that matches the required format. Tricorp Group could simply export its payroll data to the Office Connector template, creating the required submittal in just a few simple steps.

“Sage 300 with Office Connector has literally saved us months of time,” says Lamas. “We were able to use an Office Connector template to easily export large quantities of payroll data in the format required to create certified payroll reports. Without it, we would have had to manually enter historic data, which would have taken several weeks.”

Procore integration

Procore is a leading construction management solution with over two million users worldwide. Tricorp Group is one of those users. While Sage 300 forms the backbone of the company's construction accounting functions, Procore is the project-facing piece.

By using Procore's Sage 300 Connector to connect accounting and project management, the company can provide field teams with untethered access to vital financial data they need to do their jobs. Project managers have one-click access to accurate job costing information while on the construction site.



All project management, contract management, subcontracts and purchase orders, change orders, and invoicing is performed in Procore and is then transferred automatically into Sage 300. By pushing commitments straight into accounting, Lamas and the rest of the management team can make informed budgeting and forecasting decisions based on actual project data. The bi-directional integration allows both the finance and the operations teams to have real-time data so that they can accurately monitor the financial health of a project.

Efficiency at work

“We are always investigating ways we can work more efficiently by automating manual tasks and finding technology tools that work together to solve challenges,” concludes Lamas. “Sage 300 Construction and Real Estate, with Office Connector and the Procore integration are great examples of this kind of efficiency at work.”



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