



Sage Fixed Assets—Planning

# Powerful and complete CIP management

Project control before assets even hit the books? Absolutely.

Imagine a world where every asset is tracked and accounted for even before it becomes a fixed asset. With Sage Fixed Assets—Planning, that world is your reality.

**Before it's fixed, it must be accounted for**

Welcome to proactive project control with Sage Fixed Assets—Planning. Here, every facet of your assets is accounted for from the start so you can easily manage capitalized and expensed assets and get key project information instantly and effortlessly transfer assets into service.

**Clarity in construction...and beyond**

Disorganized asset tracking is a recipe for chaos. With Sage Fixed Assets—Planning and Depreciation, the days of misplaced invoices and misallocated payments are over. Easily manage any construction-in-progress, forecast tax implications accurately, and ensure accurate property tax reporting.

Sage

 Platform  
Technology Advisors

# Key advantages

## Make planning and transition to service a breeze

Planning lets you effectively manage your assets from inception to deployment. It's useful for any business but essential for those that assemble multi-component equipment, upgrade machinery, or construct or renovate buildings.

With our fully integrated solution, your fixed assets are instantly created in Sage Fixed Assets—Depreciation when ready for service, enhancing overall asset management efficiency. And our Depreciation application easily connects to Sage Intacct, 100, and 300—or connect with your existing accounting solution using Sage Expert Services.

- **Complete project lifecycle management**—From initial costs to placing assets in service, manage it all within the Sage Fixed Asset suite.
- **Detailed cost visibility**—Track every penny, anticipate future fixed assets, and align actual spending with your financial strategies. Effortless workflow integration—Leverage over 45 customizable fields to reflect your unique business processes.
- **Enhanced security**—Custom access profiles ensure your data remains secure and accessible to the right individuals.
- **Comprehensive oversight**—Holistically assess your projects' health at any level—whether at the project, line-item, or transaction.
- **Flexible expense handling**—Adapt costs with functions to copy, adjust, and divide line items, keeping your ledger accurate.
- **Real-time financial synchronization**—Reflect project financials in your general ledger, backed by timely reporting.
- **Simplified data entry**—Import purchasing data directly, streamlining your accounts payable process.

- **Get a bird's eye view**—Monitor project trajectories and financial milestones—including spend against budget.
- **Deep dive reporting**—Go beyond the surface with built-in reports designed to shine a light on the full narrative of your project's financial journey.
- **Total project oversight**—Manage the ebb and flow of multiple projects, no matter the type or size, with comprehensive cost management. Enjoy a bird's eye view of your entire project landscape, including spend against budgets—both original and revised.

Integrate seamlessly with the entire suite of Sage Fixed Assets management apps to easily manage the entire life of your fixed assets—even before they're placed in service.

## Seamless integration. Powerful results.

Pair the entire suite of Sage Fixed Assets—Planning, Tracking, Depreciation, and Reporting applications for a powerful combo that creates transparency from before your assets are placed in service to the end of their useful life—including construction in progress oversight, transparent tracking and maintenance, accurate depreciation, and invaluable insights at every stage of your asset's life.

- **Seamless integration** with the entire line of Sage Fixed Assets suite.
- After project completion, **instantly create new fixed assets** in Sage Fixed Assets—Depreciation, including multiple assets from a single line item.
- **Point-in-time reporting** helps to easily tie out project balances to your general ledger.
- **Easily import monthly invoicing transactions** from your accounts payable system to keep your projects up to date using the convenient "import wizard".
- **Create unlimited custom reports** on every aspect of your project – including project status, asset financials, and invoice details – with Sage Fixed Assets—Reporting.

# Ready to learn more?

## Own your asset management from start to finish

The Sage Fixed Assets suite creates seamless management of your fixed assets so you can tackle your capital projects with confidence and ease—capture all costs, know and track each item that will become fixed assets once in service, and report against costs as your project matures—so you can.

Our flexible workflow allows you to send completed assets to Sage Fixed Assets—Depreciation, eliminating double entry and increasing accuracy.

## We've got you!

We're here to make managing the entire life of your fixed assets easy, accurate, and more efficient.

Call us at 800-368-2405 today to learn more or visit [sagefixedassets.com](http://sagefixedassets.com).

**Group View** Project Status: **ACTIVE**  
Project Code: 5578-0002

Line Items Group: <All Line Items>

Line Item ID	Description	Status	Type	GL CIP Acct No	Start Date	End Date	# of Trans	Last Trans Date	Original Budget	Actual
- GL CIP Acct No :										
9999	PENDING TRANSA...	A	P		1/1/2011	12/31/2011	6	6/14/2021	\$0.00	\$8,129.13
14		A	C		5/1/2012	1/30/2013	0		\$0.00	\$0.00
15	Desks	A	C		5/1/2021	1/30/2022	1	6/12/2021	\$0.00	\$7,255.83
- GL CIP Acct No : 01-100-5500										
2	Land	C	C	01-100-5500	1/1/2012	3/31/2012	1	2/19/2012	\$490,000.00	\$440,000.00
7	Landscaping	A	E	01-100-5500	3/1/2012	7/15/2012	3	6/5/2012	\$3,500.00	\$3,435.00
- GL CIP Acct No : 01-200-5500										
1	Building Expansion	C	C	01-200-5500	1/1/2012	1/30/2013	23	2/12/2013	\$1,300,000.00	\$1,093,400.0
4	HVAC	C	C	01-200-5500	2/1/2012	6/30/2012	1	2/17/2012	\$75,000.00	\$72,848.1
5	Light Fixtures	C	C	01-200-5500	3/15/2012	5/30/2012	3	5/3/2012	\$14,000.00	\$14,118.4
6	Security System	C	C	01-200-5500	4/1/2012	5/30/2012	2	5/22/2012	\$9,000.00	\$8,575.3
3	Signs (3)	C	C	01-200-5500	6/30/2012	7/15/2012	2	7/14/2012	\$12,000.00	\$13,937.1
8	Door & Window Acc...	A	C	01-200-5500	1/15/2013	2/20/2013	1	2/1/2013	\$2,000.00	\$1,974.2
- GL CIP Acct No : 01-500-5500										
10	Stamping Machine	A	C	01-500-5500	7/1/2012	1/30/2013	1	7/28/2012	\$26,500.00	\$24,587.41
12	Main Assembly Unit	A	C	01-500-5500	7/1/2012	1/30/2013	1	7/15/2012	\$38,000.00	\$25,684.33
11	Lathes (2)	A	C	01-500-5500	9/1/2012	10/30/2012	1	9/15/2012	\$14,000.00	\$14,235.77
13	Conveyor Section	A	C	01-500-5500	9/1/2012	10/30/2012	5	10/29/2020	\$25,000.00	\$39,504.48
9	Cutting Assembly	A	C	01-500-5500	11/1/2012	1/30/2013	1	11/23/2012	\$55,000.00	\$45,873.96

Buttons: New Line Item, Export, Detail View, Help



[www.platformtechnologyadvisors.com](http://www.platformtechnologyadvisors.com)  
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