Sage Estimating (desktop) v26.1

External Reporting Guide

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Contents

Introduction

This guide explains how to use External Reporting to generate Sage Estimating estimate data for a separate SQL Server database so that you can use it with external reporting and business-intelligence tools. It explains what External Reporting is, how it works, and how to perform the tasks required to configure and generate in Sage Estimating data for external reports.

> **Note:** This guide does not provide instructions for designing reports in 3rd-party tools. Those who create reports outside Sage Estimating should have some working knowledge of SQL Server and the external reporting and analysis tools they intend to use.

The organization of this guide

The chapters in this guide emulate the External Reporting workflow, which includes the following stages:

- **Learn about External Reporting.**

  Chapter 1: About External Reporting explains what External Reporting is, how it is different from Advanced Reporting, and what it can do for you. It also introduces you to the External Reporting window that you create and manage external report database configurations and to generate data.

- **Create external report database configurations.** You choose which estimates to include in the external report database, how estimate items are processed, and which users can access the generated data.

  Chapter 2: Creating external report database configurations explains what external report database configurations are and provides detailed steps for creating them.

- **Generate data for external reporting.** You can generate data for one estimate or for multiple estimates.

  Chapter 4: Generating data for external report databases, explains how to generate and regenerate data for report database configurations.

- **Use the generated data for reporting and analysis.** You can access the external report database using SQL Server Management Studio or external reporting tools.

Chapter 5: Using Sage Estimating data on reports is a reference to the tables and fields generated by External Reporting.

Chapter 1: About External Reporting

External Reporting is available in the Estimating Management Console.

What is External Reporting?

External Reporting lets you generate snapshots of Sage Estimating data and store that data in a separate SQL Server database. You can then use the generated data with external reporting, dashboarding, or business-intelligence tools.

External Reporting is useful when you need estimate data to:

- Remain available for repeated analysis
- Be accessed outside Sage Estimating or
- Be used by other users or tools without regenerating reports each time

> **Note:** External Reporting generates estimate data for use in other applications. It does not create reports by itself.

External Reporting compared with Advanced Reporting

External Reporting and Advanced Reporting use the same reporting tables and views. Both tools generate data that is a snapshot of your estimates at a particular point in time. The primary difference is how long the generated data is available:

- Data generated by **Advanced Reporting** is temporary and is removed when you close the report.
- Data generated by **External Reporting** is saved in a separate external report database and remains available until you generate the data again.

Because the data persists, External Reporting is typically used for dashboards, recurring reports, and other scenarios where data needs to be reused.

The External Reporting window

You use the External Reporting window (available in the Estimating Management Console) to create snapshots of your data that you can use to produce custom reports and dashboards, and to analyze using a variety of business intelligence tools. The data is saved in a separate external report database in your SQL Server instance.

To open the External Reporting window:

1. Open the Estimating Management Console.
2. Click [**External Reporting**] on the ribbon.

The External Reporting window includes a catalog pane and the following 3 tabs:

- **Options**, which displays details for a selected configuration.
- **Estimates**, where you select estimates to include in the report database for the configuration. You also use this tab to generate data for all or selected estimates specified by the configuration.
- **User Access**, where you grant access to users who need to generate report data for the configuration.

The next sections describe these tabs in more detail.

> **Note:** This chapter does not describe every field and control on these tabs. You can easily view this information in the online help by pressing the F1 key on your keyboard as you work in the External Reporting window.

The Configuration Catalog pane

The Catalog pane displays the list of existing configurations. You can organize configurations by creating branches and subbranches.

To create a branch:

- Right-click **All Configurations**, and then select **New** > **Branch**.

To start a new configuration:

- Select the branch where you want to store the configuration, and then click **New External Report Database Configuration**.

Configuration Catalog toolbar

Use the toolbar to create branches, to open the New External Report Database Configuration window, delete items, and refresh the catalog.

Configuration status information

When you select a configuration, the status bar can display statistics such as:

- Number of estimates included or excluded,
- Generated data that is current or out of date,
- Locked estimates,
- Estimates with errors.

Chapter 2: Creating external report database configurations

An external report database configuration is a reusable set of options that Sage Estimating uses to generate estimate data into a separate external report database.

Each configuration defines:

- The external report database name,
- Which estimates are included,
- How estimate items are grouped and processed,
- What item and total data is generated, and
- Which non-administrative users have read access.

Each configuration generates a separate external report database. You can add as many configurations as you need.

To add a configuration:

1. Open the Estimating Management Console.
2. On the toolbar, click [**External Reporting**].
3. Click **New External Report Database Configuration**.
4. In the **New External Report Database Configuration** window:
   a. In the box provided, type the name for the new configuration.

      Tip: Give the configuration a meaningful name that will help you remember the type of report data it generates, later.

   b. Tab to the next box, and then type the name for the new external report database.

      Each configuration generates a separate external report database.

c. Specify whether to include all estimates in the configuration by default. (You can include and exclude specific estimates later, manually, as needed.)

d. Specify whether to grant read-only access to the external report database to all users by default. (You can add and remove non-administrative users' access, later.)

e. Specify the branch in the configuration catalog on which you want to locate the new configuration.

f. Click [**OK**].

5. On the **Options** tab of the External Report Database Configuration window:

a. To make totals generated by this configuration available to estimate grids in the Manage Estimates window (in Estimating) or in the Estimates window in the [[[Undefined variable DataMigration.EstimatingManagementConsole]]], select the **Estimate Grid Totals Source** option.

b. For the **Sequence**, select one of the following alternatives:

- To generate data using the last sequence used to view an estimate, select **Current**.
- To generate data using a different sequence:

i. Select **Custom**.

ii. Click the browse button  .

iii. In the **Edit Grouping Hierarchy** window, from the **Available Fields** list, select the fields by which you want to group estimate items.

iv. Click the right arrow key to add each one to the right-hand pane. Then use the  and  buttons to specify the order in which to group the information in the database.

v. Click [**OK**].

c. Specify whether to use the estimates' native system of measurement or to convert all units to Imperial or Metric in the external report database.

d. Use the **Options** checkboxes to specify how to generate item information for the external report database, including whether to include overlines, combine items, allocate addons, and so on.

> **Note:**
>
> - If you select **Generate only Project Information, Branch, and Totals**, the information Estimating writes to report databases is limited to estimate header information, and you do not specify other types of item information to generate.

- If you select Generate only Project Information, Branch, and Totals, you can select the **Generate data on estimate close and save** option to generate report data when you save and close estimates.

6. On the **Estimates** tab:
   a. If you want to include all new estimates in the configuration automatically, select the **Automatically include new estimates in this configuration** option.
   b. If you want to limit the number of estimates generated for the external reports database, select the **Limit generated estimate count** option and then specify the number of estimates that can exist in the external reports database.
   c. In the Estimates grid, select the checkbox for each estimate for which to generate data using this configuration. Clear the checkboxes for estimates for which you do not want this configuration to generate data.

Tip: If a large number of estimates appear in the grid, use the filters in the column headers to display only estimates with specific characteristics.

7. On the **User Access** tab:
   a. Select **Automatically include new users in this configuration** if you want to provide new non-administrative users access to the selected external report database configuration automatically.
   b. In the grid, select the non-administrative users who need to read from the external reports database that this configuration will create. (That is, provide read access to users who will create reports using this data.)

Chapter 3: Generating data for external report databases

You use External Report, available in the Estimating Management Console, to generate estimate data that you can use with reporting and business intelligence software to create reports and dashboards and to analyze your data in different ways. Data is generated and saved in an external report database in your SQL Server instance for each particular configuration, and is current when you generate it.

Note: Any errors that occur during data generation are written to the Windows Event Log.

You can generate data any time you want an updated snapshot of your estimate data.

Tip: You can make the totals generated for an external report database configuration available to the estimate grids in the **Estimates** window in the Estimating Management Console and in the **Manage Estimate** window (in Estimating). For example, you might want to compare total cost information for several estimates so you can choose the best estimate to use as an estimate template. Selecting the option for at least one configuration makes the columns available each use to add to the grids.

In the **External Report** window, on the **External Report Database Configuration** tab, select the **Estimate Grid Totals Source** option for a selected configuration. (If more than one set of data has been generated, the grid displays the most up-to-date totals.)

Before you generate data for external report databases

To generate data for external report databases, you need to add configurations with the settings to use when generating estimate data. A configuration is a set of options used to generate data for external reports.

For more information, see Adding an External Report Database Configuration.

Important! External Reporting generates a snapshot of estimate data. If an estimate changes, you must generate data again for reports to reflect those changes.

Generating data for multiple configurations

If you need to generate data many estimates all at once, run the **Estimating External Report Database Generator** to generate data for all the estimates included in your configurations.

> **Note:** If you generate data for a large number of estimates–for example, by running the Estimating External Report Database Generator–do so only when no other users are working with your Estimating database.

Run the Estimating External Report Database Generator in one of the following ways:

- In the `Program Files\Sage Estimating\Sage Estimating [version]` folder (or the folder where you installed Estimating), double-click `Sage.Estimating.ExternalReportDBGenerator.exe`.

  Any errors encountered during data generation are reported in the Windows Console, as well as in the Windows Event Log.

- Run `Sage.Estimating.ExternalReportDBGenerator.exe` from the Windows command line.
- Create a task in the Windows Task Scheduler.

  > **Note:** Because you should generate data for many estimates only when no other users are working with the Estimating database, set the task to run at night (say, 1 am).

  For information on creating tasks using the Task Scheduler, see the Windows help.

Generating data for one estimate at a time

You can generate external report data for one estimate at a time in either the Estimating application or in the Estimating Management Console.

- In Sage Estimating (desktop), open the estimate for which you want to generate data, and then click the **Generate Data** button on the Reports ribbon.

  > **Note:** The **Generate Data** button is available only if the estimate is included in a configuration.

- In the Estimating Management Console:

  1. Click **External Report**.
  2. From the configuration catalog pane, select a configuration.
  3. If you need to make sure that the estimate information in the Create External Report Database Configuration pane is up to date, click the **Refresh** button () on the

configuration catalog toolbar. (Normally, you won't need to refresh the pane because it is updated when you open the configuration.)

4. In the estimate grid in the **Create External Report Database Configuration** pane, click the **[Generate]** button for each estimate, as needed.

Chapter 4: Using Sage Estimating data on reports

You can view tables and columns generated for an External Reports database in SQL Server Management Studio.

To view table columns:

1. Open SQL Server Management Studio.
2. Connect to the Sage Estimating SQL Server instance.
3. Expand the external report database.
4. Expand **Tables**, and then **Columns**.

List of tables in the External Reports Database

- Report.Addon_v1
- Report.AddonBasis_v1
- Report.Address_v1
- Report.Alternate_v1
- Report.AlternateStatus_v1
- Report.Assembly_v1
- Report.AssemblyAttachment_v1
- Report.AssemblyDetail_v1
- Report.BidGroup_v1
- Report.Branch_v1
- Report.CityCostIndex_v1
- Report.CityCostIndexDetail_v1

- Report.Company_v1
- Report.Crew_v1
- Report.CrewDetail_v1
- Report.CrewResource_v1
- Report.Estimate_v1
- Report.GroupAssembly_v1
- Report.GroupCrew_v1
- Report.GroupModel_v1
- Report.GroupPhase_v1
- Report.Item_v1
- Report.ItemAddonAllocation_v1
- Report.ItemAttachment_v1
- Report.ItemWbsValue_v1
- Report.MaterialClass_v1
- Report.Model_v1
- Report.ModelLine_v1
- Report.NamedNote_v1
- Report.Overline_v1
- Report.Person_v1
- Report.Phase_v1
- Report.ProjectInfo_v1
- Report.RateTable_v1
- Report.RateTableColumnHeading_v1
- Report.RateTableDetail_v1
- Report.ReportOptions_v1
- Report.Subcategory_v1
- Report.SubcontractorBid_v1
- Report.Totals_v1
- Report.Unit_v1
- Report.WbsDefinition_v1
- Report.WbsValue_v1

Appendix: Sample Reports

This appendix contains examples of 2 reports that you can create using External Reports.

- The **Lump Sum Proposal Report** is a professional proposal that presents the total project cost as a single lump sum, along with detailed scope, inclusions, exclusions, schedule assumptions, and contract terms. This report provides a complete, client-ready summary of the project, including payment terms, compliance requirements, and construction timelines.
- The **Standard Proposal by Division Report** is a detailed proposal that breaks down the total project cost by construction divisions (such as concrete, electrical, and finishes), with subtotals and markups. This report helps you present a transparent cost structure while still including the full project scope, schedule, and contractual details in a professional format.

NATIONAL BUILDERS | GENERAL CONTRACTORS

PROPOSAL

Date: 05/19/2026

Client: Lexington Communities INC.
Contact: Clayton Kershaw
Phone: 503-625-4510
Email: clayton.kershaw@lexington.com

Architect: Design Group Architecture
Contact: John Winters
Phone: 503-874-2250
Email: john.winter@design.ga.com

RE: **Terrace Clubhouse Single Phase**
Scope: Interior Remodel
Address: 200 City Boulevard
Orange CA 92868

Engineer: Hertz Engineering Inc.
Contact: Timothy Hertz
Phone: 503-987-2844
Email: tim.hertz@hertzengineering.com

Sage General Contractors is pleased to submit this Construction Proposal for the above referenced project. This proposal is based on our review of the available drawings, specifications, site conditions, and scope requirements.

This proposal outlines the scope of work, contract sum, schedule assumptions, and general terms under which the Work will be performed.

At this time, the Sanitary piping scope of work as well as the Controls Scope of work has been excluded from this proposal.

Project: **Terrace Clubhouse Single Phase**
Scope: Interior Remodel
Address: 200 City Boulevard
Orange CA 92868

Total Sum Amount for Above Project: $861,507.80

Payment Terms: NET 30 Days
This proposal expires after 60 days
Thank you for the opportunity to provide a bid for this project.

Nathaniel Westley

Nathaniel Westley

Sr. Project Manager

Project Overview

This project consists of the construction of a new commercial facility designed to support modern business operations while meeting applicable code, safety, and performance requirements. The work will be executed under Contract delivery method and includes all labor, materials, equipment, supervision, and coordination necessary to complete the project in accordance with the contract documents.
The scope of work includes site preparation, structural construction, building envelope, interior build-out, mechanical, electrical, plumbing (MEP) systems, and associated finishes. Construction will be performed in compliance with all local, state, and federal regulations, including building codes, fire/life safety standards, and accessibility requirements.

The project is designed to provide a durable, efficient, and functional commercial space suitable for office, retail, or mixed-use occupancy. Emphasis will be placed on quality workmanship, schedule adherence, cost control, and minimizing disruptions to adjacent properties and ongoing operations, where applicable.

Scope of Work

1. GENERAL DESCRIPTION
The Contractor shall furnish all labor, materials, equipment, supervision, permits, coordination, and services necessary to construct the commercial project in accordance with the Contract Documents, including drawings, specifications, addenda, and approved submittals. Work shall be completed in compliance with all applicable codes, regulations, and industry standards.

2. PRE-CONSTRUCTION SERVICES
Review of contract documents and constructability
Coordination with Owner, Architect, Engineers, and Authorities Having Jurisdiction (AHJ)
Preparation of project schedule and sequencing plan
Submittals, shop drawings, and material approvals
Site logistics planning and safety program implementation

3. SITE WORK
Mobilization and site setup
Excavation, grading, and compaction
Utility connections and coordination (water, sewer, electric, gas, data as required)
Stormwater management and erosion control
Site concrete, paving, curbs, sidewalks, and striping (where applicable)

4. STRUCTURAL CONSTRUCTION
Foundations, slabs, footings, and structural concrete
Structural steel, framing, and deck installation
Load-bearing walls and structural supports
Coordination of embeds and penetrations for MEP systems

Inclusions

GENERAL & ADMINISTRATIVE
Project management and on-site supervision
Coordination with Owner, Architect, Engineers, and Authorities Having Jurisdiction (AHJ)
Progress meetings and project reporting

MOBILIZATION & SITE MANAGEMENT
Mobilization and demobilization
Jobsite setup, fencing, signage, and access control
Temporary erosion control and stormwater protection
Construction waste management and routine site cleanup

SITE WORK
Earthwork, excavation, and backfill within project limits
Site grading and compaction
Underground utilities within the project boundary
Concrete curbs, sidewalks, and paving shown in plans
Site restoration within disturbed construction areas

STRUCTURAL CONSTRUCTION
Foundations, footings, slabs-on-grade, and structural concrete
Structural steel supply and installation
Load-bearing framing and structural supports
Coordination of sleeves, embeds, and penetrations

Exclusions

PRE-EXISTING CONDITIONS
Hazardous materials identification, testing, monitoring, removal, or remediation (including but not limited to asbestos, lead, mold, PCBs, contaminated soils)
Unknown or concealed site conditions not reasonably discoverable prior to construction
Structural deficiencies or undocumented conditions in existing buildings

DESIGN & ENGINEERING
Architectural, structural, civil, mechanical, electrical, plumbing, or fire protection design services
Engineering revisions not required to construct work as shown in the Contract Documents
Third-party peer reviews or value engineering beyond agreed pre-construction scope

PERMITS, FEES & OFF-SITE COSTS
Rezoning, land use approvals, variances, or entitlement fees
Impact fees, utility district fees, school fees, or development fees
Off-site utility upgrades beyond the project property line or designated point of connection

UTILITIES & SERVICES
Utility company service fees and activation charges
Permanent utility service interruptions caused by utility providers
Temporary power or water beyond what is required solely for construction operations

FURNISHINGS, FIXTURES & EQUIPMENT (FF&E)
Furniture, furnishings, and loose equipment
Owner-furnished fixtures or equipment unless explicitly noted as Contractor-installed
Specialty equipment calibration, programming, or training not shown in plans

Estimated Construction Schedule

SCHEDULE SUMMARY
Estimated Construction Duration: 24-28 weeks
Delivery Method: Lump Sum
Start Date: TBD (Upon permit issuance and Notice to Proceed)
Substantial Completion: Approximately Week 24-26
Final Completion: Approximately Week 26-28

ESTIMATED CONSTRUCTION PHASES
Phase Description Estimated Duration
Pre-Construction Permits, submittals, mobilization 2-4 weeks (overlapping)
Site Preparation Site setup, demolition (if applicable), earthwork 2-3 weeks
Foundations & Slab Footings, foundations, slab-on-grade 3-4 weeks
Structural Framing Structural steel, framing, decking 3-4 weeks
Building Envelope Exterior walls, roofing, windows, doors 3-4 weeks
MEP Rough-In Mechanical, electrical, plumbing rough-ins 4-5 weeks
Interior Build-Out Framing, drywall, ceilings 4-5 weeks
Finishes Flooring, paint, trim, fixtures 4-5 weeks
MEP Trim & Startup Fixtures, controls, testing 2-3 weeks
Final Inspections & Punch List Inspections, corrections, closeout 2-3 weeks

SCHEDULING ASSUMPTIONS
Permits and approvals are issued without delay
Contract documents are complete and approved prior to construction
Long-lead materials are identified early and released promptly
Normal working hours apply (no premium or accelerated schedule)
One inspection cycle per trade, barring deficiencies

Construction Materials

SITE & CIVIL MATERIALS
Aggregates, fill, and base materials meeting local specifications
Concrete curbs, sidewalks, and flatwork (normal-weight concrete)
Reinforcing steel (rebar), wire mesh, and dowels
Underground utility piping (PVC, HDPE, ductile iron, or approved equal)
Temporary erosion control materials (silt fence, wattles, inlet protection)

STRUCTURAL MATERIALS
Cast-in-place concrete for foundations, footings, and slabs
Reinforcing steel per structural drawings
Structural steel framing (beams, columns, joists, decking)
Anchor bolts, embeds, and structural connections
Bearing plates and shim materials

BUILDING ENVELOPE MATERIALS
Exterior wall framing (steel or wood studs, cold-formed members)
Exterior sheathing (gypsum sheathing, cement board, or approved equal)
Weather-resistive barriers and air/vapor barriers
Exterior insulation (rigid board, mineral wool, or spray as specified)
Roofing assemblies (membrane, insulation, flashings, accessories)
Exterior doors, frames, hardware
Windows, storefront, curtain wall, and glazing systems
Sealants, flashing, and waterproofing materials

Work Schedules

BASELINE CONSTRUCTION SCHEDULE
The Contractor shall submit a baseline construction schedule within ten (10) calendar days after Notice to Proceed (NTP), unless otherwise stated.
The schedule shall identify major phases of work, milestones, and the projected date of Substantial Completion.
The baseline schedule shall be used as a management and coordination tool and shall be made available to the Owner upon request.

SCHEDULE FORMAT
Unless otherwise required by the Contract Documents, the schedule may be presented in one or more of the following formats:
Bar chart (Gantt-style) schedule
Milestone schedule
Phase-based summary schedule
Critical path schedules (CPM) shall only be required if expressly stated in the Agreement.

DETAILED WORK SCHEDULES
The Contractor shall maintain detailed trade and phase schedules as required to:
Coordinate subcontractor activities
Sequence work to avoid conflicts and delays
Plan inspections and testing
Track material procurement and long-lead items
These schedules may be maintained internally and updated as necessary to manage field operations.

SUBCONTRACTOR SCHEDULING
All subcontractors shall comply with the Contractor's approved work schedule.
Subcontractors shall provide manpower and resources consistent with scheduled durations.
Failure by subcontractors to meet scheduled activities shall not relieve the Contractor of overall schedule responsibility.

Change Order Policy

DEFINITION OF A CHANGE
A Change Order is a written modification to the Contract Documents that alters:
Scope of Work
Contract Price
Contract Schedule
No verbal instruction or field directive shall be considered authorization to proceed with a change.

CAUSES FOR CHANGE ORDERS
Change Orders may arise from, but are not limited to, the following:
Owner-requested scope changes or revisions
Design changes, errors, or omissions
Code or Authority Having Jurisdiction (AHJ) requirements after permit issuance
Unforeseen site conditions not reasonably discoverable
Material substitutions approved by the Owner

CHANGE REQUEST PROCEDURE
1. Upon identification of a potential change, the Contractor shall submit a Change Order Proposal describing:
· Scope of the change
· Cost impact
· Schedule impact
2. The Owner shall review the proposal and either:
· Approve as submitted
· Reject the proposal
· Request revisions or clarifications

Compliance

LAWS, CODES & REGULATIONS
All Work shall conform to, including but not limited to:
Federal, state, and local laws and regulations
Building, fire, mechanical, electrical, plumbing, energy, and accessibility codes in effect at the time of permit issuance
Occupational Safety and Health Administration (OSHA) regulations
Environmental protection and waste disposal regulations
Americans with Disabilities Act (ADA) requirements, where applicable
Where code conflicts occur, the more stringent requirement shall govern.

CONTRACT DOCUMENT COMPLIANCE
The Contractor shall construct the Project strictly in accordance with the approved drawings, specifications, addenda, and approved submittals.
Deviations from the Contract Documents shall not be permitted without prior written approval.
Work performed outside the approved scope shall be corrected at no cost to the Owner unless authorized by Change Order.

PERMITS & INSPECTIONS
All work shall comply with conditions and requirements of issued permits.
The Contractor shall coordinate and attend required inspections.
Work that fails to meet inspection requirements shall be corrected promptly.
Re-inspection or correction costs caused by non-compliant work shall be borne by the Contractor.

SAFETY & HEALTH COMPLIANCE
The Contractor shall implement and enforce a site-specific Safety Program compliant with OSHA and Owner safety requirements.
All subcontractors and suppliers shall comply with site safety rules.
The Contractor shall be responsible for safety of personnel, visitors, and the public within the Work area.
Unsafe or non-compliant activities may be suspended until corrected

Warranties

CONTRACTOR WARRANTY PERIOD
The Contractor shall provide a minimum one (1) year warranty on workmanship, commencing from the date of Substantial Completion, unless a longer period is specified in the Contract Documents.
This warranty covers defects arising from improper installation, faulty workmanship, or failure to perform Work in accordance with contract requirements.

MANUFACTURER WARRANTIES
All manufacturer, supplier, and equipment warranties applicable to installed materials and systems shall be assigned or passed through to the Owner.
Manufacturer warranties shall be provided at project closeout and shall commence no later than Substantial Completion, unless otherwise specified.
Where manufacturer warranties exceed the Contractor's warranty period, the longer warranty shall apply to the covered material or equipment.

WARRANTY MATERIALS & DOCUMENTATION
At Final Completion, the Contractor shall deliver to the Owner:
Warranty certificates and documentation
Manufacturer operating and maintenance requirements
Warranty start dates and durations
Contact information for warranty claims
Failure to provide required warranty documentation may delay Final Payment.

WARRANTY EXCLUSIONS
The Contractor's warranty does not cover:
Normal wear and tear
Abuse, misuse, or neglect
Lack of proper maintenance by Owner
Acts of God, fire, flooding, or weather events beyond normal conditions
Damage caused by Owner, tenants, or third parties
Work altered or modified by others without Contractor approval

Changes In Work

AUTHORITY TO ORDER CHANGES
The Owner may order changes to the Work through a written Change Order or written directive.
No change shall be binding unless authorized in writing by the Owner (or Owner's authorized representative) and the Contractor.
The Contractor shall not be required to perform changes without written authorization, except in emergency or life-safety situations.

TYPES OF CHANGES
Changes in the Work may include, but are not limited to:
Additions, deletions, or revisions to the Scope of Work
Modifications to materials, systems, or finishes
Design clarifications, revisions, or corrections
Code-driven changes required after permit issuance
Adjustments resulting from unforeseen site conditions

CHANGE ORDER PROCESS
1. The Contractor shall submit a written change proposal detailing:
· Description of the change
· Cost impact
· Schedule impact
2. The Owner shall review and either:
· Approve the Change Order
· Reject the proposed change
· Request revisions or clarification
No change work shall commence until approval is granted, unless otherwise directed in writing.

Payment Terms

1. CONTRACT SUM
The Owner agrees to pay the Contractor the Contract Sum as defined in the Agreement for the full and complete performance of the Work in accordance with the Contract Documents, subject to approved modifications.

2. SCHEDULE OF VALUES
Prior to the first payment application, the Contractor shall submit a Schedule of Values (SOV) allocating the Contract Sum to various portions of the Work.
The Schedule of Values shall be used as the basis for reviewing progress payment applications.
The Schedule of Values is subject to Owner and Architect approval.

3. PROGRESS PAYMENTS
Progress payments shall be made monthly based on the percentage of Work completed and materials suitably stored on site (if approved).
The Contractor shall submit a Payment Application no later than the agreed monthly cutoff date.
Payment Applications shall be reviewed and certified by the Architect or Owner's Representative, if applicable.

4. RETAINAGE
A retainage of ten percent (10%) shall be withheld from each progress payment unless otherwise stated in the Agreement.
Upon Substantial Completion of the Project, retainage may be reduced or partially released in accordance with the Contract Documents.
Final retainage shall be released upon Final Completion and acceptance of the Work.

Permit Approval

GENERAL
All construction shall be performed in accordance with the requirements of the Authorities Having Jurisdiction (AHJ) and applicable federal, state, and local laws, codes, ordinances, and regulations.
No construction activity shall commence until the required permits have been issued.

PERMIT RESPONSIBILITY
The Owner shall be responsible for providing a complete and approved set of construction documents suitable for permitting unless otherwise stated in the Agreement.
The Contractor shall obtain standard building permits and trade permits (mechanical, electrical, plumbing, fire protection) required for construction of the Work, as identified in the Contract Documents.
Specialty permits, zoning approvals, variances, and entitlement approvals are excluded unless specifically included in writing.

PERMIT COSTS
Permit fees identified as construction permits are included in the Contract Price unless stated otherwise.
Fees associated with rezonings, development impact fees, utility district fees, or off-site approvals are excluded unless expressly noted.

REVIEW & APPROVAL PROCESS
The Contractor shall coordinate submission of permit applications, drawings, and required documentation to the permitting authority.
The Contractor shall respond to plan check comments related to construction means, methods, or code compliance within the Contractor's scope.
Revisions required due to design errors, omissions, or Owner-initiated changes may require additional time and cost.

PERMIT REVISIONS & RESUBMITTALS
Revisions to permit documents resulting from Authority comments that do not alter project scope shall be incorporated as part of the Work.
Revisions resulting from Owner-directed scope changes, incomplete documents, or jurisdictional interpretation changes may be subject to Change Order.

Construction Insurance Bond

CONTRACTOR INSURANCE REQUIREMENTS
The Contractor shall maintain the following minimum insurance coverages:
a. COMMERCIAL GENERAL LIABILITY
· Coverage shall include premises/operations, products and completed operations, contractual liability, and independent contractors
· Minimum Limits:
· $1,000,000 per occurrence
· $2,000,000 general aggregate
b. AUTOMOBILE LIABILITY
Coverage for owned, hired, and non-owned vehicles
Minimum Limit: $1,000,000 combined single limit
c. WORKERS' COMPENSATION
· Workers' Compensation Insurance in compliance with applicable state laws
· Employer's Liability coverage with minimum limits of:
· $1,000,000 each accident
· $1,000,000 disease - policy limit
d. UMBRELLA / EXCESS LIABILITY
Excess coverage over General Liability, Auto Liability, and Employer's Liability
Minimum Limit: $2,000,000 per occurrence / aggregate

Contract Termination

TERMINATION FOR CAUSE - BY OWNER
The Owner may terminate the Contract for cause if the Contractor:
Fails to prosecute the Work in accordance with the approved schedule
Fails to comply with Contract Documents after written notice
Performs defective work and fails to correct it promptly
Fails to maintain required insurance or bonding
Fails to pay subcontractors or suppliers
Violates safety or regulatory requirements resulting in project risk
Becomes insolvent, files bankruptcy, or ceases operations

CURE PERIOD
Owner shall provide written notice of default.
Contractor shall have seven (7) to fourteen (14) calendar days to cure the default, unless the condition requires immediate action for safety or code compliance.

OWNER RIGHTS UPON TERMINATION FOR CAUSE
Upon termination for cause:
Owner may take possession of the Work, materials, equipment, and subcontracts
Owner may complete the Work by whatever method deemed appropriate
Contractor shall not be entitled to further payment until completion costs are determined
Contractor shall be liable for costs incurred by the Owner to complete the Work in excess of the remaining Contract Sum

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The Owner may terminate this Contract, in whole or in part, for convenience and without cause upon written notice.
Contractor Entitlements
Upon termination for convenience, the Contractor shall be entitled to payment for:
Work properly executed to date
Materials furnished and materials reasonably ordered for the Project
Reasonable demobilization and closeout costs
Reasonable overhead and profit on Work performed (not on unperformed work)
Payment shall constitute full settlement of all Contractor claims arising from the termination.

Agreement Terms

CONTRACTOR RESPONSIBILITIES
Contractor shall:
Provide competent supervision and coordinate subcontractors and suppliers
Maintain site safety program in compliance with OSHA and project rules
Protect the Work and adjacent property
Keep the site reasonably clean; remove debris routinely
Secure the site and control access as needed
Perform work in a workmanlike manner consistent with industry standards

OWNER RESPONSIBILITIES
Owner shall:
Provide timely decisions, selections, and approvals
Provide access to site and legal right to build
Provide complete design documents suitable for permitting (unless design-build)
Maintain Builder's Risk coverage if assigned to Owner (see Insurance section)
Identify Owner-furnished items and delivery dates

Acceptance:

_____
Signature

_____
Print Name

_____
Title

_____
Date

NATIONAL BUILDERS | GENERAL CONTRACTORS

PROPOSAL

Date: 05/19/2026

Client: Lexington Communities INC.
Contact: Clayton Kershaw
Phone: 503-625-4510
Email: clayton.kershaw@lexington.com

Project: **Terrace Clubhouse Single Phase**
Scope: Interior Remodel
Address: 200 City Boulevard
Orange CA 92868

Architect: Design Group Architecture
Phone: 503-874-2250

Engineer: Hertz Engineering Inc.
Phone: 503-987-2844

Sage General Contractors is pleased to submit this Construction Proposal for the above referenced project. This proposal is based on our review of the available drawings, specifications, site conditions, and scope requirements.

This proposal outlines the scope of work, contract sum, schedule assumptions, and general terms under which the Work will be performed.

Division	Description	Division Totals
01-0000.000	GENERAL CONDITIONS	$102,240.95
01-8100.000	DURATION & RENTED EQUIPMENT	$17,691.86
02-0000.000	EXISTING CONDITIONS & DEMO	$84,453.54
03-0000.000	CONCRETE	$9,292.50
06-0000.000	ROUGH CARPENTRY	$22,823.53
06-2000.000	FINISH CARPENTRY	$1,486.93
07-0000.000	THERMAL & MOISTURE	$7,333.72
09-0000.000	FINISHES	$199,159.35
22-0000.000	PLUMBING	$108,324.00
23-0000.000	HVAC	$38,750.00
26-0000.000	ELECTRICAL	$157,500.00
	Sub - Total	$749,056.38
	Mark Up: Insurance, OH Fee	$112,451.42
	Total Proposal Amount	$861,507.80

Project Overview

This project consists of the construction of a new commercial facility designed to support modern business operations while meeting applicable code, safety, and performance requirements. The work will be executed under Contract delivery method and includes all labor, materials, equipment, supervision, and coordination necessary to complete the project in accordance with the contract documents.
The scope of work includes site preparation, structural construction, building envelope, interior build-out, mechanical, electrical, plumbing (MEP) systems, and associated finishes. Construction will be performed in compliance with all local, state, and federal regulations, including building codes, fire/life safety standards, and accessibility requirements.

The project is designed to provide a durable, efficient, and functional commercial space suitable for office, retail, or mixed-use occupancy. Emphasis will be placed on quality workmanship, schedule adherence, cost control, and minimizing disruptions to adjacent properties and ongoing operations, where applicable.

Scope of Work

1. GENERAL DESCRIPTION
The Contractor shall furnish all labor, materials, equipment, supervision, permits, coordination, and services necessary to construct the commercial project in accordance with the Contract Documents, including drawings, specifications, addenda, and approved submittals. Work shall be completed in compliance with all applicable codes, regulations, and industry standards.

2. PRE-CONSTRUCTION SERVICES
Review of contract documents and constructability
Coordination with Owner, Architect, Engineers, and Authorities Having Jurisdiction (AHJ)
Preparation of project schedule and sequencing plan
Submittals, shop drawings, and material approvals
Site logistics planning and safety program implementation

3. SITE WORK
Mobilization and site setup
Excavation, grading, and compaction
Utility connections and coordination (water, sewer, electric, gas, data as required)
Stormwater management and erosion control
Site concrete, paving, curbs, sidewalks, and striping (where applicable)

4. STRUCTURAL CONSTRUCTION
Foundations, slabs, footings, and structural concrete
Structural steel, framing, and deck installation
Load-bearing walls and structural supports
Coordination of embeds and penetrations for MEP systems

Inclusions

GENERAL & ADMINISTRATIVE
Project management and on-site supervision
Coordination with Owner, Architect, Engineers, and Authorities Having Jurisdiction (AHJ)
Progress meetings and project reporting

MOBILIZATION & SITE MANAGEMENT
Mobilization and demobilization
Jobsite setup, fencing, signage, and access control
Temporary erosion control and stormwater protection
Construction waste management and routine site cleanup

SITE WORK
Earthwork, excavation, and backfill within project limits
Site grading and compaction
Underground utilities within the project boundary
Concrete curbs, sidewalks, and paving shown in plans
Site restoration within disturbed construction areas

STRUCTURAL CONSTRUCTION
Foundations, footings, slabs-on-grade, and structural concrete
Structural steel supply and installation
Load-bearing framing and structural supports
Coordination of sleeves, embeds, and penetrations

Exclusions

PRE-EXISTING CONDITIONS
Hazardous materials identification, testing, monitoring, removal, or remediation (including but not limited to asbestos, lead, mold, PCBs, contaminated soils)
Unknown or concealed site conditions not reasonably discoverable prior to construction
Structural deficiencies or undocumented conditions in existing buildings

DESIGN & ENGINEERING
Architectural, structural, civil, mechanical, electrical, plumbing, or fire protection design services
Engineering revisions not required to construct work as shown in the Contract Documents
Third-party peer reviews or value engineering beyond agreed pre-construction scope

PERMITS, FEES & OFF-SITE COSTS
Rezoning, land use approvals, variances, or entitlement fees
Impact fees, utility district fees, school fees, or development fees
Off-site utility upgrades beyond the project property line or designated point of connection

UTILITIES & SERVICES
Utility company service fees and activation charges
Permanent utility service interruptions caused by utility providers
Temporary power or water beyond what is required solely for construction operations

FURNISHINGS, FIXTURES & EQUIPMENT (FF&E)
Furniture, furnishings, and loose equipment
Owner-furnished fixtures or equipment unless explicitly noted as Contractor-installed
Specialty equipment calibration, programming, or training not shown in plans

Estimated Construction Schedule

SCHEDULE SUMMARY
Estimated Construction Duration: 24-28 weeks
Delivery Method: Lump Sum
Start Date: TBD (Upon permit issuance and Notice to Proceed)
Substantial Completion: Approximately Week 24-26
Final Completion: Approximately Week 26-28

ESTIMATED CONSTRUCTION PHASES
Phase Description Estimated Duration
Pre-Construction Permits, submittals, mobilization 2-4 weeks (overlapping)
Site Preparation Site setup, demolition (if applicable), earthwork 2-3 weeks
Foundations & Slab Footings, foundations, slab-on-grade 3-4 weeks
Structural Framing Structural steel, framing, decking 3-4 weeks
Building Envelope Exterior walls, roofing, windows, doors 3-4 weeks
MEP Rough-In Mechanical, electrical, plumbing rough-ins 4-5 weeks
Interior Build-Out Framing, drywall, ceilings 4-5 weeks
Finishes Flooring, paint, trim, fixtures 4-5 weeks
MEP Trim & Startup Fixtures, controls, testing 2-3 weeks
Final Inspections & Punch List Inspections, corrections, closeout 2-3 weeks

SCHEDULING ASSUMPTIONS
Permits and approvals are issued without delay
Contract documents are complete and approved prior to construction
Long-lead materials are identified early and released promptly
Normal working hours apply (no premium or accelerated schedule)
One inspection cycle per trade, barring deficiencies

Construction Materials

SITE & CIVIL MATERIALS
Aggregates, fill, and base materials meeting local specifications
Concrete curbs, sidewalks, and flatwork (normal-weight concrete)
Reinforcing steel (rebar), wire mesh, and dowels
Underground utility piping (PVC, HDPE, ductile iron, or approved equal)
Temporary erosion control materials (silt fence, wattles, inlet protection)

STRUCTURAL MATERIALS
Cast-in-place concrete for foundations, footings, and slabs
Reinforcing steel per structural drawings
Structural steel framing (beams, columns, joists, decking)
Anchor bolts, embeds, and structural connections
Bearing plates and shim materials

BUILDING ENVELOPE MATERIALS
Exterior wall framing (steel or wood studs, cold-formed members)
Exterior sheathing (gypsum sheathing, cement board, or approved equal)
Weather-resistive barriers and air/vapor barriers
Exterior insulation (rigid board, mineral wool, or spray as specified)
Roofing assemblies (membrane, insulation, flashings, accessories)
Exterior doors, frames, hardware
Windows, storefront, curtain wall, and glazing systems
Sealants, flashing, and waterproofing materials

Work Schedules

BASELINE CONSTRUCTION SCHEDULE
The Contractor shall submit a baseline construction schedule within ten (10) calendar days after Notice to Proceed (NTP), unless otherwise stated.
The schedule shall identify major phases of work, milestones, and the projected date of Substantial Completion.
The baseline schedule shall be used as a management and coordination tool and shall be made available to the Owner upon request.

SCHEDULE FORMAT
Unless otherwise required by the Contract Documents, the schedule may be presented in one or more of the following formats:
Bar chart (Gantt-style) schedule
Milestone schedule
Phase-based summary schedule
Critical path schedules (CPM) shall only be required if expressly stated in the Agreement.

DETAILED WORK SCHEDULES
The Contractor shall maintain detailed trade and phase schedules as required to:
Coordinate subcontractor activities
Sequence work to avoid conflicts and delays
Plan inspections and testing
Track material procurement and long-lead items
These schedules may be maintained internally and updated as necessary to manage field operations.

SUBCONTRACTOR SCHEDULING
All subcontractors shall comply with the Contractor's approved work schedule.
Subcontractors shall provide manpower and resources consistent with scheduled durations.
Failure by subcontractors to meet scheduled activities shall not relieve the Contractor of overall schedule responsibility.

Change Order Policy

DEFINITION OF A CHANGE
A Change Order is a written modification to the Contract Documents that alters:
Scope of Work
Contract Price
Contract Schedule
No verbal instruction or field directive shall be considered authorization to proceed with a change.

CAUSES FOR CHANGE ORDERS
Change Orders may arise from, but are not limited to, the following:
Owner-requested scope changes or revisions
Design changes, errors, or omissions
Code or Authority Having Jurisdiction (AHJ) requirements after permit issuance
Unforeseen site conditions not reasonably discoverable
Material substitutions approved by the Owner

CHANGE REQUEST PROCEDURE
1. Upon identification of a potential change, the Contractor shall submit a Change Order Proposal describing:
· Scope of the change
· Cost impact
· Schedule impact
2. The Owner shall review the proposal and either:
· Approve as submitted
· Reject the proposal
· Request revisions or clarifications

Compliance

LAWS, CODES & REGULATIONS
All Work shall conform to, including but not limited to:
Federal, state, and local laws and regulations
Building, fire, mechanical, electrical, plumbing, energy, and accessibility codes in effect at the time of permit issuance
Occupational Safety and Health Administration (OSHA) regulations
Environmental protection and waste disposal regulations
Americans with Disabilities Act (ADA) requirements, where applicable
Where code conflicts occur, the more stringent requirement shall govern.

CONTRACT DOCUMENT COMPLIANCE
The Contractor shall construct the Project strictly in accordance with the approved drawings, specifications, addenda, and approved submittals.
Deviations from the Contract Documents shall not be permitted without prior written approval.
Work performed outside the approved scope shall be corrected at no cost to the Owner unless authorized by Change Order.

PERMITS & INSPECTIONS
All work shall comply with conditions and requirements of issued permits.
The Contractor shall coordinate and attend required inspections.
Work that fails to meet inspection requirements shall be corrected promptly.
Re-inspection or correction costs caused by non-compliant work shall be borne by the Contractor.

SAFETY & HEALTH COMPLIANCE
The Contractor shall implement and enforce a site-specific Safety Program compliant with OSHA and Owner safety requirements.
All subcontractors and suppliers shall comply with site safety rules.
The Contractor shall be responsible for safety of personnel, visitors, and the public within the Work area.
Unsafe or non-compliant activities may be suspended until corrected

Warranties

CONTRACTOR WARRANTY PERIOD
The Contractor shall provide a minimum one (1) year warranty on workmanship, commencing from the date of Substantial Completion, unless a longer period is specified in the Contract Documents.
This warranty covers defects arising from improper installation, faulty workmanship, or failure to perform Work in accordance with contract requirements.

MANUFACTURER WARRANTIES
All manufacturer, supplier, and equipment warranties applicable to installed materials and systems shall be assigned or passed through to the Owner.
Manufacturer warranties shall be provided at project closeout and shall commence no later than Substantial Completion, unless otherwise specified.
Where manufacturer warranties exceed the Contractor's warranty period, the longer warranty shall apply to the covered material or equipment.

WARRANTY MATERIALS & DOCUMENTATION
At Final Completion, the Contractor shall deliver to the Owner:
Warranty certificates and documentation
Manufacturer operating and maintenance requirements
Warranty start dates and durations
Contact information for warranty claims
Failure to provide required warranty documentation may delay Final Payment.

WARRANTY EXCLUSIONS
The Contractor's warranty does not cover:
Normal wear and tear
Abuse, misuse, or neglect
Lack of proper maintenance by Owner
Acts of God, fire, flooding, or weather events beyond normal conditions
Damage caused by Owner, tenants, or third parties
Work altered or modified by others without Contractor approval

Changes In Work

AUTHORITY TO ORDER CHANGES
The Owner may order changes to the Work through a written Change Order or written directive.
No change shall be binding unless authorized in writing by the Owner (or Owner's authorized representative) and the Contractor.
The Contractor shall not be required to perform changes without written authorization, except in emergency or life-safety situations.

TYPES OF CHANGES
Changes in the Work may include, but are not limited to:
Additions, deletions, or revisions to the Scope of Work
Modifications to materials, systems, or finishes
Design clarifications, revisions, or corrections
Code-driven changes required after permit issuance
Adjustments resulting from unforeseen site conditions

CHANGE ORDER PROCESS
1. The Contractor shall submit a written change proposal detailing:
· Description of the change
· Cost impact
· Schedule impact
2. The Owner shall review and either:
· Approve the Change Order
· Reject the proposed change
· Request revisions or clarification
No change work shall commence until approval is granted, unless otherwise directed in writing.

Payment Terms

1. CONTRACT SUM
The Owner agrees to pay the Contractor the Contract Sum as defined in the Agreement for the full and complete performance of the Work in accordance with the Contract Documents, subject to approved modifications.

2. SCHEDULE OF VALUES
Prior to the first payment application, the Contractor shall submit a Schedule of Values (SOV) allocating the Contract Sum to various portions of the Work.
The Schedule of Values shall be used as the basis for reviewing progress payment applications.
The Schedule of Values is subject to Owner and Architect approval.

3. PROGRESS PAYMENTS
Progress payments shall be made monthly based on the percentage of Work completed and materials suitably stored on site (if approved).
The Contractor shall submit a Payment Application no later than the agreed monthly cutoff date.
Payment Applications shall be reviewed and certified by the Architect or Owner's Representative, if applicable.

4. RETAINAGE
A retainage of ten percent (10%) shall be withheld from each progress payment unless otherwise stated in the Agreement.
Upon Substantial Completion of the Project, retainage may be reduced or partially released in accordance with the Contract Documents.
Final retainage shall be released upon Final Completion and acceptance of the Work.

Permit Approval

GENERAL
All construction shall be performed in accordance with the requirements of the Authorities Having Jurisdiction (AHJ) and applicable federal, state, and local laws, codes, ordinances, and regulations.
No construction activity shall commence until the required permits have been issued.

PERMIT RESPONSIBILITY
The Owner shall be responsible for providing a complete and approved set of construction documents suitable for permitting unless otherwise stated in the Agreement.
The Contractor shall obtain standard building permits and trade permits (mechanical, electrical, plumbing, fire protection) required for construction of the Work, as identified in the Contract Documents.
Specialty permits, zoning approvals, variances, and entitlement approvals are excluded unless specifically included in writing.

PERMIT COSTS
Permit fees identified as construction permits are included in the Contract Price unless stated otherwise.
Fees associated with rezonings, development impact fees, utility district fees, or off-site approvals are excluded unless expressly noted.

REVIEW & APPROVAL PROCESS
The Contractor shall coordinate submission of permit applications, drawings, and required documentation to the permitting authority.
The Contractor shall respond to plan check comments related to construction means, methods, or code compliance within the Contractor's scope.
Revisions required due to design errors, omissions, or Owner-initiated changes may require additional time and cost.

PERMIT REVISIONS & RESUBMITTALS
Revisions to permit documents resulting from Authority comments that do not alter project scope shall be incorporated as part of the Work.
Revisions resulting from Owner-directed scope changes, incomplete documents, or jurisdictional interpretation changes may be subject to Change Order.

Construction Insurance Bond

CONTRACTOR INSURANCE REQUIREMENTS
The Contractor shall maintain the following minimum insurance coverages:
a. COMMERCIAL GENERAL LIABILITY
· Coverage shall include premises/operations, products and completed operations, contractual liability, and independent contractors
· Minimum Limits:
· $1,000,000 per occurrence
· $2,000,000 general aggregate
b. AUTOMOBILE LIABILITY
Coverage for owned, hired, and non-owned vehicles
Minimum Limit: $1,000,000 combined single limit
c. WORKERS' COMPENSATION
· Workers' Compensation Insurance in compliance with applicable state laws
· Employer's Liability coverage with minimum limits of:
· $1,000,000 each accident
· $1,000,000 disease - policy limit
d. UMBRELLA / EXCESS LIABILITY
Excess coverage over General Liability, Auto Liability, and Employer's Liability
Minimum Limit: $2,000,000 per occurrence / aggregate

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Subimitted by:

Nathaniel Westley

Nathaniel Westley

Sr. Project Manager

Acceptance:

_____
Signature

_____
Print Name

_____
Title

_____
Date