

## Reporting And Financial Tools In Sage Master Builder

**R**eporting and financial analysis tools consistently rank as among the most important features of any construction software package. Sage Master Builder offers powerful integrated reporting and analysis tools that deliver timely, relevant data to help you manage all aspects of your construction business. In this article we will take a closer look at reporting and financial tools for Sage Master Builder including: Project Reports, Financial Reports, Customer Report Writers, Report Scheduler, Executive Dashboard, Project Work Center, and the Financial Review component.

### Project Reports

When you have access to accurate, real-time data, you are able to make informed business decisions and react quickly to changing conditions affecting your projects. Sage Master Builder reporting capabilities will help you to:

- Compare actual costs to budget to facilitate more accurate decision making and course corrections.
- See where your costs are coming from, including labor, materials, supplies, equipment, and more.
- Make accurate future estimates—review historical job cost information to apply to future estimates for continued profitability.
- Compare actual versus budgeted labor



by crew to know how effectively you are estimating labor.

- Learn which projects are most lucrative, and why, with complete job cost information.
- Create accurate, specialized job cost reports as needed, including Bonding, Work in Progress (WIP), and loan requirement documentation.

### Financial Reports

While your business revolves around your projects, you must still pay attention to the back office accounting functions in order to remain profitable. Sage Master Builder financial reporting capabilities will help you to:

- Catch project and business-related problems early to allow for corrective action.
- Create mandated reports quickly.

*(continued on page 2)*

## Reporting And Financial Tools In Sage Master Builder

(continued from cover)

- Know and understand the factors that have an impact on your company's profitability.
- Manage and plan for cash flow contingencies.
- Understand business trends by reviewing revenues, costs, profits, losses, and more.
- Export key information and reports to Microsoft Excel to perform further analysis.

### Report Writers

With over 1,000 standard reports available in Sage Master Builder, it is likely you'll find a report to suit your needs, but it is nice to have the convenience of the Sage Master Builder Report Writer when you want the flexibility to adjust reports to meet your specific requirements. The easy-to-use Report Writer can help you create, format, save, and print custom reports. If you are familiar with the industry-standard report writing tool, Crystal Reports, you may use it to dramatically expand your custom reporting options. With either tool your reports can be exported to Excel, Word, or as a PDF.

When you need to access the details behind a number on your report, Sage Master Builder allows you to drill down multiple levels into the record and transaction detail.

### On Your Schedule

The Sage Master Builder Report Scheduler allows you to schedule the automatic delivery of your reports to customers, subcontractors, suppliers, or employees by way of fax, e-mail, or to your own printer. This can be a tremendous time saver, and it ensures that important information gets into the hands of those who need it.

### Executive Dashboard

The Sage Master Builder Executive Dashboard provides a single screen from which you can monitor the overall financial health of your company at a glance—quickly and easily. You can view and drill-down into the details of key business metrics such as: Cash Balances, Cash Position, Company Profitability, Change Orders, and Job Profitability.

### Project Work Center

The Sage Master Builder Executive Dashboard tool provides owners and managers with a high-level view of the company's financial activities and standing. The Project Work Center is similar to the Dashboard, but is job focused, rather than focusing on the company as a whole.

You can customize the Project Work Center to include access to the reports, screens, and tasks important to a particular job, providing a single location from which to launch and view all project-related data. You choose which elements you want to include.

### Financial Review

The Financial Review component of your Sage Master Builder software can help you track and report on your key ratios. Financial Review is a graphing tool that will show you trends and ratios for your company with a few mouse clicks. Whether you would like to see a graph of your overhead rate month by month or a graph of your profit for the year to date—with Financial Review it is simple and quick. Among the many graphs available are: Current Ratio, Quick Ratio, Gross Profit/Sales, Net Profit/Sales, and Overhead to Direct Expense.

Call us with your questions about the reporting and analysis capabilities of Sage Master Builder. ✨

## Converting From QuickBooks To Sage Master Builder

Switching software is not anyone's idea of fun. One factor that complicates many new software implementations is the data conversion between the old and new software package. If the dread of converting your QuickBooks data to Sage Master Builder has kept you from taking the plunge, we have some good news.

There is a simple conversion path from

QuickBooks to Sage Master Builder that can have your data converted and ready for use in Sage Master Builder within a day or two after the data is received. Among the data that can easily be converted are elements from the following areas: General Ledger, Customers/Receivables, Customers/Jobs, Vendors and Payables, Employees and Payroll, and Inventory Parts.

When you can avoid the tedious start-up data entry tasks, you and your staff can be productive right away, and take advantage of the many construction-specific features and broad functionality that Sage Master Builder delivers.

Please call us for more details about converting from QuickBooks to Sage Master Builder. ✨