

Sage Software — Sage Master Builder

800-726-6278

www.sagemasterbuilder.com

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From the April/May 2007 [Review of Construction Accounting Software](#)

In May 2006, Sage Software purchased Master Builder from Intuit. Master Builder is well suited to midsize construction companies and related service contractors, including electricians, heavy construction contractors, plumbing and HVAC, and homebuilders. Master Builder has a multitude of strong features, including the Executive Dashboard, which allows users to check important business statistics, including cash balance, profitability, job status and any change orders. The Executive Dashboard also allows for the monitoring of receivables balances, aged accounts, payable balances and income from operations. An excellent client-tracking feature allows for the maintenance of all potential and current customers. The job cost feature allows jobs to be kept on budget and tracks costs when they do go over. The equipment management tracks every piece of equipment, including maintenance and historical costs. Service managers will appreciate the integrated service management feature that allows for the tracking of service contracts, the dispatch of technicians, and the maintenance of work orders.

LEARNING CURVE -- 5 Stars

Sage Master Builder is easily installed with activation codes provided for all purchased modules. The updated Sage license server makes it easier than ever to have the program up and running. The main screen of Master Builder contains a small drop-down menu to change companies, activate the Executive Dashboard or access Help files.

To the left of the screen is a list of installed system modules. Clicking on a module will expand the menu to display the relevant features found within that module. Data-entry screens are easily navigated, with lookup options available on all fields. Job costs are organized by job detail, phase, cost codes and cost types. Users can formulate their own job cost numbering format or import a list from another source. Icons representing functions such as save, print, change posting date, and notes can also be found on the user interface screen. A drop-down menu is available within the entry screen for copying and pasting documents, editing transactions and searching for transactions. Sage Master Builder also comes with an excellent and recently updated Help file, along with a sample company that can be installed prior to going live with company files.

MODULES & ADD-ONS – 5 Stars

Modules include GL, AR (including job costing and progress billing), AP, Payroll, Project Management (including subcontracts, proposals and document control capability), Equipment Management, Estimating, Scheduling, Service Receivables and Inventory. Also included is a Review and Reporting module that includes the Executive Dashboard reporting feature and a built-in report writer function. Numerous third-party applications are available that integrate with Master Builder, including CAD Integration; Point of Sale; a Scale Management and Weighing System; Service Management; Time, Attendance and Job Tracking; and CRM/Sales Process Management.

PRODUCTIVITY TOOLS – 5 Stars

Master Builder contains extensive tools designed for more efficient tracking of customers, expenses, jobs and phases. Such tools include the Client Tracking module, which works from initial client solicitation to recording notes and scheduling follow up contact. The Scheduling module allows resources to be allocated where and when needed. The Document Control/Management module easily tracks RFIs and RFPs. The Dispatching feature allows users to assign jobs by priority and by technician expertise. And the Executive Dashboard will update essential personnel with the latest statistical information, including current cash position, income from operations and under-billed jobs.

IMPORT/EXPORT & INTEGRATION – 4.5 Stars

Sage Master Builder API is a tool designed to assist Master Builder users when using a third-party software application. Data can be imported using copy-and-paste techniques, and the third-party applications discussed earlier provide an extensive tool for importing data from other sources. Budget and proposal files can be easily exported as can scheduling files. And financial reports can be easily exported to Excel by clicking on the Excel icon in the reporting function.

REPORTING – 5 Stars

Master Builder contains top-of-the-line reporting capabilities with over 1,000 reports available. A built-in Report Writer function allows for the creation of customized reports, and using the Form/Report Page Design allows users to import company logos and create customized client invoices and letterhead. Reports can be exported to Excel spreadsheets or directly e-mailed to recipients. The Quick Reports function allows basic reports to be quickly created for review. And the report scheduling feature allows reports to be scheduled to print on a specific date and time.

SUPPORT & TRAINING – 5 Stars

Master Builder's Maintenance and Support program offers two levels of support — BasicCare and TotalCare. Both levels include product and tax updates, along with access to the Customer Knowledgebase. Gold level support also includes technical support, the Discovery Training Package, and Audit Repair and Account Period Close Assistance. Technical support is also available during regular business hours. Over 200 brief tutorials are included with Master Builder, and the previously mentioned Discovery Package includes New Customer Training Classes, Quick Start-Up and Product Upgrade classes. Training classes are accessed via WebEx technology and require advance registration.

RELATIVE VALUE – 5 Stars

Master Builder is an excellent product, and, with its purchase by Sage Software, it will undoubtedly continue to be a leader in the construction/contractor software industry. Strong job tracking and reporting modules along with a complete GL and Payroll module make this a complete construction accounting and management product that will fit with virtually any size company. Master Builder starts at less than \$3,000 for a single-user system.

2007 Overall Rating – 5 Stars

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