



Effective Resources-  
Gulf States, Ltd.  
*a better way to run your construction business*

# ★ info

Newsletter for Sage Master Builder

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## ERGS News

Don't forget to sign up for your Year End Closing training classes. We have scheduled 3 dates for your convenience **Dec 22, 23 and 29th**. These training sessions will be web based, 1 hr classes, from 3:00 PM - 4:00 PM. To register please contact Brenda at 888-842-9730 or [bmichalak@ergulfstates.com](mailto:bmichalak@ergulfstates.com).

### Training agenda:

- When to backup
- How to audit your books
- What tasks are performed by Close Books
- Contents of the archive folder
- Closing and removing completed jobs
- Removing paid invoices
- Voiding entries from the prior year
- Modifying general ledger accounts

sage

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## Manage Profitably Of Jobs With Sage Master Builder Project Management

In these lean economic times, it is more essential than ever to maximize the profitability of every job. How accurately you schedule work, manage subcontractors, and process documents can make the difference in successfully completed, profitable projects. In this article, we will cover three of the key components of Sage Master Builder project management that help you take control—Project Work Center, Scheduling, and Change Order Management.

### Project Work Center

Successful project management is about staying on top of what's going on in the field, in the office, and with your clients. Project Work Center is your all-in-one command center—one user-friendly window provides access to every essential task. The Hot List gives you a list of all outstanding project management and accounting tasks, so you can take immediate, timely action. The Job Cost summary allows you to see exactly where you stand with a particular job with an overview of job information, such as approved changes and costs to date. Gantt charts give you a graphical view of project schedules that show at a glance where you should be on a project, and where the bottlenecks are. When you stay on top of projects every step of the way, profits increase as you finish jobs sooner and reduce labor costs and potential overages.



### Scheduling

A big part of keeping projects on track is making sure you have the right materials and crews on the right job at the right time. Sage Master Builder has powerful visual tools to make it easy to maintain every aspect of the project schedule.

You can create your schedule easily with the graphical, easy-to-use Critical Path Management scheduling tool. Tasks from Estimating Basic are automatically displayed, and you can quickly assign vendors, equipment, and employees to various tasks.

Once tasks are assigned, the scheduling tool will generate task lists with all vendors and subcontractors already assigned. You can choose to generate a call sheet listing every

## Manage Profitably Of Jobs With Sage Master Builder Project Management

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subcontractor and supplier needed on your jobs, including their phone numbers, dates, schedules, and work descriptions, and use it to communicate with them. You also can automatically generate notices informing them when to perform work and make deliveries. Project notices can be automatically created for your crews as well, assuring you get your teams on the right jobs at the right time.

When the inevitable schedule changes occur, you can act quickly with built-in tools. Drag and drop tasks to their new position, and the software automatically adjusts other tasks, adding or removing time as required. The new notices needed can be generated automatically, and you can print, fax, or e-mail them to subcontractors, suppliers,

clients, and employees, on demand and at set intervals that you select.

### Change Order Management

Change Orders can often make or break the profitability of a project. Making sure changes are properly costed, approved, and billed can make a huge difference in project profitability. Sage Master Builder helps ensure you get paid for all work you do by managing the change order process from budget to completion. You can update your contract, budget, and subcontracts in just one step. Then, because you can approve each part of the change independently, you can still negotiate subcontracts after approval of the prime contract. Sage Master Builder will

automatically update billing once change orders are approved.

Sage Master Builder generates professional change order forms that include complete documentation and can be customized to your needs. Change order status information assures that you avoid starting work without first receiving written approval.

Change order billing is flexible, too. You can invoice for change work separately, and even use a different billing method, such as time and materials billing.

Are you taking full advantage of all the power of these tools? Give us a call for assistance. ✨

## Year-End Processing

Year end is upon us, and with it all the special activities required for government compliance and reporting. If you're new to Sage Master Builder, or unsure of how to get started with year-end tasks, give us a call. If you're more of a do-it-yourself type, there are a variety of documents and tools available to assist you with your year-end close. Here are a few suggestions.

The **Year-End Software Update**, which includes changes to government reporting requirements and forms such as 1099 and W-2, will be available from Sage the first week of January 2009. The update will only be compatible with Sage Master Builder Version 13, so be sure you have upgraded to this version. Give us a call if you have questions about upgrading.

The **Year-End Procedures** page on the

Sage Master Builder Web site provides a series of tips on year-end procedures and recommended knowledgebase entries for current customers. Key in the following link and then enter your customer ID and password and you will go directly to the Year-End Procedures page.

[http://www.sagemasterbuilder.com/login/l\\_cl\\_yearend.asp](http://www.sagemasterbuilder.com/login/l_cl_yearend.asp)

Also on this page is a link to the **Year-End Procedures Complimentary Training**, a new series of 13 Anytime Learning Webcasts created by Sage to ease your way through year-end tasks.. Each 5 to 20 minute lesson is a recorded, instructor-led, online presentation that includes checklists, helpful hints, and a step-by-step guided tour through essential year-end processes. All that is required is a high-speed internet connection and a

computer with headphones or speakers.

The Webcasts cover year-end tasks such as:

- Making prior-year adjustments
- Closing and removing completed jobs
- Removing paid invoices
- Resetting vendor 1099 balances for the new calendar year
- Updating payroll calculations and employee rates and limits
- Printing W-2s and 1099s, and filing them electronically
- Printing reports to help you complete federal and state unemployment forms

Performing year-end procedures on a timely basis and in the correct sequence is essential to the proper operation of your software. Please give us a call if you need assistance. ✨