

The ULTIMATE REPORTS Guide

SAGE MASTER BUILDER






**Sample Reports
Service Contractors**



www.cfosonthego.net

The Ultimate Reports Guide

for Sage Master Builder

-  There are over 1000 reports available in the Sage Master Builder construction management software. How can you quickly locate the report you need, when you need it? The help you need can be found in **“The Ultimate Reports Guide”**.
-  **No more wasted time running report after report to find the one you need.** Quickly locate desired reports from alpha and numeric indexes.
-  Informative color “annotations” help you understand the usefulness and value of each report to aid in the education of the software, as well as the information obtainable using specific reports.
-  Quickly determine “Locked” reports by the identifiable “🔒” symbol so you know which ones can be modified in Report Writer.
-  Returning customers receive a “Prior Purchase” discount when updating to a new version!

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Managed Rite Construction

825 Gravenstein Hwy
Sebastopol CA 95472
707 529-2414

License: 582956

Service Quote

Invoice#: 55980-1

Date: 01/30/2002

Billed To: NE Enterprises
39652 Northwestern Hgwy
Detroit MI 48154

Project: G-5700 Southfield Highway
Southfield MI 48567

This quote is valid until03/01/2002

Order#: 83478

Assembly#	Part#	Description	Quantity	Price	Ext Price	Sales Tax
21460		4.0 Ton Compressor Chang	1.0000	1,995.94	1,995.94	Y
	20	Plumber	9.5000			N
	912	4.0 Ton 3 Phase Compress	1.0000			Y
	1001	1/2" Liquid Line Dryer	1.0000			Y
	1002	3/4" Suction Line Dryer	1.0000			Y
	998	Terminal Wire Kit	1.0000			Y
	1015	3/8" OD CXC 90	1.0000			Y
	1020	3/4" OD CXC 90	1.0000			Y
	1012	3/8" OD CXC Coupling	1.0000			Y
	1013	3/4" OD CXC Coupling	1.0000			Y
	267	Silver Solder Stick	2.0000			Y
	1010	Freon R-22	8.0000			Y
	1032	Refrigerant Recovery/Recla	1.0000			Y
	1006	Rubber Compressor Feet	1.0000			Y
	100	Miscellaneous Task Parts	10.0000			Y

Notes

This installation is quoted as is. No substitutions or modifications accepted. A new quote may be obtained if modifications are required.

Four (4) simple steps makes this report (11-2-0-53) easy to use:

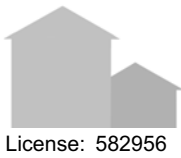
Step 1: Create Quote if accepted.

Step 2: Change to Work Order for technician.

Step 3: Edit Work Order with actual work done by technician.

Step 4: Post and print Invoice.

Non-Taxable Amount:	0.00
Taxable Amount:	1,995.94
Sales Tax:	119.76
Quote Total	2,115.70



Managed Rite Construction
 825 Gravenstein Hwy
 Sebastopol CA 95472
 707 529-2414

License: 582956

Work Order

Order#: 55980

Order Date: 01/30/2002

Billed To: NE Enterprises
 39652 Northwestern Hgwy
 Detroit MI 48154

Project: Detroit Medical Labratories
 G-5700 Southfield Highway
 Southfield MI 48567

Scheduled: 03/01/2002
Time: 08:30 AM

Employee: 387
 Kelly Lambert

Order#: 83478

Assembly#	Part#	Description	Unit	Quantity
21460		4.0 Ton Compressor Changeout 1Ph or	Each	1.0000
	20	Plumber	Hr	9.5000
	912	4.0 Ton 3 Phase Compressor	Each	1.0000
	1001	1/2" Liquid Line Dryer	Each	1.0000
	1002	3/4" Suction Line Dryer	Each	1.0000
	998	Terminal Wire Kit	Each	1.0000
	1015	3/8" OD CXC 90	Each	1.0000
	1020	3/4" OD CXC 90	Each	1.0000
	1012	3/8" OD CXC Coupling	Each	1.0000
	1013	3/4" OD CXC Coupling	Each	1.0000
	267	Silver Solder Stick	Each	2.0000
	1010	Freon R-22	Each	8.0000
	1032	Refrigerant Recovery/Reclamation/Ev	Each	1.0000
	1006	Rubber Compressor Feet	Each	1.0000
	100	Miscellaneous Task Parts	Each	10.0000

Notes

Kelly, Unit 7 on roof is leaking and shut down. Also, please stop by Main office to check in with Bill Smithe, the maintenance supervisor.

Technician knows what material is
 required but no costs are shown
 when printing this report (11-2-0-42).
 * * *
 Customize, using Report Writer
 module within
 Sage Master Builder™.



Service Route Sheet
with Address; and Notes
Status = 9

Order#	Location	Start	Finish	Hours
Tuesday September 24, 2002, Route 1				
9855	NE Main Offices 39652 Northwestern Hwy. Troy MI 48856 Unit 7 on roof leaking and shut down.	02:45 PM	05:00 PM	2.25
4377	Detroit Medical Laboratories G-5700 Southfield Highway Southfield MI 48567 See Joe for details.	09:00 AM	10:30 AM	1.50
4368	Riverbend Women's Clinic 6745 Woodward Ave. Southfield MI 48567 Apparant leak in Women's bathrrom near rear entrance. Third stall from the left.	11:00 AM	02:00 PM	2.00

Keep your technicians
happy and productive
with a daily route report.



Managed Rite Construction
 825 Gravenstein Hwy
 Sebastopol CA 95472
 707 529-2414

Service Invoice

Invoice#: 55980

Date: 03/10/2002

License: 582956

Billed To: NE Enterprises
 39652 Northwestern Hgwy
 Detroit MI 48154

Project: Detroit Medical Laboratories
 G-5700 Southfield Highway
 Southfield MI 48567

Scheduled: 03/01/2002
Time: 08:30 AM

Employee: 387
 Kelly Lambert

Order#: 83478

Assembly#	Part#	Description	Quantity	Price	Ext Price	Sales Tax
21460		4.0 Ton Compressor Chang	1.0000	1,995.940000	1,995.94	Y
	20	Plumber	9.5000			N
	912	4.0 Ton 3 Phase Compress	1.0000			Y
	1001	1/2" Liquid Line Dryer	1.0000			Y
	1002	3/4" Suction Line Dryer	1.0000			Y
	998	Terminal Wire Kit	1.0000			Y
	1015	3/8" OD CXC 90	1.0000			Y
	1020	3/4" OD CXC 90	1.0000			Y
	1012	3/8" OD CXC Coupling	1.0000			Y
	1013	3/4" OD CXC Coupling	1.0000			Y
	267	Silver Solder Stick	2.0000			Y
	1010	Freon R-22	8.0000			Y
	1032	Refrigerant Recovery/Recla	1.0000			Y
	1006	Rubber Compressor Feet	1.0000			Y
	100	Miscellaneous Task Parts	10.0000			Y

Notes:

Regular Maintenance is important. A maintenance contract form is included with this invoice for your convenience. Please call our office if you have any questions.

Invoices never have to be keyed. They are created from a Work Order. They are printed, using this report (11-2-0-22).

A service charge of 18.00 % per annum will be charged on all amounts overdue on regular statement dates.

Thank you for your prompt payment!

Non-Taxable Amount:	0.00
Taxable Amount:	1,995.94
Sales Tax:	119.76
Amount Due	2,115.70

Service Invoice Profitability

08/28/05



Managed Rite Construction

Work Order#	Mat'l Cost	% of Billing	Labor Cost	% of Billing	Other Cost	% of Billing	Total Cost	% of Billing	Billing Amount	Gross Profit	% of Billing
2 Service Only											
155 Smith Warranty											
4	250.00	98.90 %		%		%	250.00	98.90%	252.78	2.78	1.10%
Job Totals							250.00		252.78	2.78	
2002 Misc Service Jobs											
12379	89.40	12.59 %	178.72	25.17 %	150.00	21.13 %	418.12	58.89%	710.00	291.88	41.11%
2442	700.00	41.18 %		%	150.00	8.82 %	850.00	50.00%	1,700.00	850.00	50.00%
2464	118.52	49.61 %	68.33	28.60 %	31.48	13.18 %	218.33	91.39%	238.89	20.56	8.61%
Job Totals							1,486.45		2,648.89	1,162.44	
9999 Jacksons											
12358	3.00	6.00 %		%		%	3.00	6.00%	50.00	47.00	94.00%
Job Totals							3.00		50.00	47.00	
Invoice Type Totals							1,739.45		2,951.67	1,212.22	
Grand Totals							1,739.45		2,951.67	1,212.22	

This report not only gives you your Gross Profit for each Service Invoice, but breaks it out for the percentage of billing for material, Labor and other costs.



Client Balances

Client #	Client Name	Status	Type	Beginning Balance	Ending Balance
1	Randy Smith	6 C.O.D.	1 Residential	130.00	4,630.00
100	IMB Industries	1 Current	3 Industrial	175.50	283.50
101	Ralph Kramer	1 Current	2 Commercial	1,285.90	2,926.98
102	Sam Malone	1 Current	1 Residential		
103	Harmon Fraizier Inc	1 Current	2 Commercial		
104	Bob Grant	1 Current	2 Commercial		
105	Robert Miller	1 Current	1 Residential		311.70
106	Youngblood Development	5 Alert	2 Commercial	727.07	727.07
107	D & R Glass	1 Current	2 Commercial		620.00
108	Hampton Beach	1 Current	2 Commercial		
109	Miller, Roger	2 Previous	1 Residential		
112	Henry White	1 Current	1 Residential		3,728.04
113	D & R Glass	1 Current	2 Commercial		
114	Blue Blazes	1 Current	1 Residential		
115	Frazier Holmes	1 Current	1 Residential		689.00
116	Grant Roberts	1 Current	2 Commercial		2,500.00
117	John Ashley	1 Current	1 Residential		4,325.00
118	Federal Government	1 Current	4 Government	572.53	1,251.38
119	DBC Industrial Tech	1 Current	3 Industrial		3,233.00
120	Highpoint Enterprises	1 Current	2 Commercial		678.85
Grand Total:				2,891.00	25,904.52

Client balances by status and type.



Service Invoice List

by Client/Location

Client# 6 to 6

Record#	Invoice#	Date	Description	Invoice Total	Balance
6 NE Enterprises					
34	155	09/04/2002	Clean filters and Ductwork	1,995.94	Quote
Location Subtotal:				1,995.94	Quote
2 Detroit Medical Laboratories					
37	55980	01/30/2002	South wing AC Unit	2,115.70	Order
42	56934557	01/30/2002	East wing AC Unit	2,265.70	2,265.70
Location Subtotal:				4,381.40	2,265.70
3 Riverbend Women's Clinic					
43	995346	09/24/2002	R&R Toilet	2,634.75	2,634.75
Location Subtotal:				2,634.75	2,634.75
Client Subtotal:				9,012.09	4,900.45
Grand Total:				9,012.09	4,900.45

Monitor client activity by each of their locations for excessive repairs to their equipment.



Managed Rite Construction

XXXX Main St
Anywhere CA 99999
800 555-5555

STATEMENT

Statement Date: 08/19/2005

License: 999999

TO: Lamb Shoes, Inc
232 Counter Dr
Springfield MO 65807

Past Due: \$1,612.50

Invoice#	Inv Date	Due Date	Description	Job/Work Order	Amount	Paid/Credit	Balance
4	07/15/05	07/30/05	Monthly Service Check	4	1,612.50		1,612.50
222	06/15/07	06/30/07	T&M Billing	220 - Lamb Shoes	4,506.89		4,506.89
CR-Storage	06/18/07	07/03/07	Credit for storing Materi	220 - Lamb Shoes	-200.00		-200.00
Totals:					5,919.39		5,919.39

Print Combined Statements (Report 3-4-0-24)
to show a customer how much they owe
you for both Contract and Service work.

Current 4,306.89	1-30 Days 1,612.50	31-60 Days 0.00	61-90 Days 0.00	91 + Days 0.00	Retention 0.00
---------------------	-----------------------	--------------------	--------------------	-------------------	-------------------

Please Pay This Amount

5,919.39

Thank you for your prompt payment!

Managed Rite Construction
XXXX Main St
Anywhere CA 99999

08/19/2005

Lamb Shoes, Inc
232 Counter Dr
Springfield MO 65807

Dear Mr. Robson

Enclosed please find a statement of your account as of 08/19/2005

Statements are normally printed once a month and will reflect all invoices and payments received to date. If you have already sent payment on any of the listed invoices, please feel free to contact our office to verify that we have received your payment.

We consider current and accurate information on your account part of the service we provide. Please call if you have any questions regarding this statement or any of the listed invoices. We appreciate your prompt payment. It allows us to provide better service, and obtain the highest quality materials and subcontract services for your project.

Please let us know how we can serve you better!

Sincerely,

Judy Hirsch

Customize your statement letter to print with your logo and specific verbiage on this report (3-4-0-24). Or you can quickly modify the report and remove page 3 to stop it from printing.



Job Profitability

*Combined Contract and Service
Period <= 7, Job Status = 4*

Job	Total Costs	Costs % of Billing	Contract Billing	Service Billing	Gross Profit	Profit % Billing
186 Williams Post Off	371,652.68	68.75	540,551.80		168,899.12	31.25
201 Trappen Motel	535,645.13	70.89	755,639.12		219,993.99	29.11
207 Wood Elementar	551,876.51	73.58	750,030.57		198,154.06	26.42
220 Lamb Shoes	6,835.34	65.61	9,327.63	1,089.90	3,582.19	34.39
Grand Totals:	1,466,009.66		2,055,549.12	1,089.90	590,629.36	

When doing both Service Receivable and/or Contract work, stay on top of the profit % for both industries or it can be a great report even if you only perform work in one of the industries.

Service Invoice Aging

08/19/05



Managed Rite Construction

Service Invoice Aging
Land

Record#	Invoice#	Due Date	Balance	Current	1 - 30	31 - 60	61 - 90	91+	Total Due
135 Christina Jimenez									
2	2	06/30/2005	250.00			250.00			250.00
	Client Totals:		250.00			250.00			250.00
136 Lamb Shoes, Inc									
4	4	07/30/2005	1,612.50		1,612.50				1,612.50
	Client Totals:		1,612.50		1,612.50				1,612.50
Grand Totals:			1,862.50		1,612.50	250.00			1,862.50

Age your open Service invoices seperately
from your open Contract invoices!



Managed Rite Construction

Client Current Aging

09/19/02

Client Current Aging

Land: Alpha
 Status < 4

Client#	Name	Current	1 - 30	31 - 60	61 - 90	91 +	Total
107	D & R Glass	620.00					620.00
119	DBC Industrial Tech	3,233.00					3,233.00
118	Federal Government		678.85	572.53			1,251.38
115	Frazier Holmes	689.00					689.00
116	Grant Roberts			2,500.00			2,500.00
112	Henry White	3,728.04					3,728.04
120	Highpoint Enterprises	678.85					678.85
100	IMB Industries	108.00					108.00
117	John Ashley	4,325.00					4,325.00
101	Ralph Kramer		1,641.08				1,641.08
1	Randy Smith	4,500.00					4,500.00
105	Robert Miller	311.70					311.70
Grand Totals:		18,193.59	2,319.93	3,072.53			23,586.05

Print agings by client and see all monies owed to you in total by client.



Service Call Sheet
with Invoice Detail
Client# 118 to 120, Status < 4

Client#	Name	Contact	Days Aged	Balance	Past Due
Invoice#	Due Date	Description			
118 Federal Government			Donald Garfield		
Phone: 888 754-0924	Ext:	Phone 2:	Fax: 707 255-3056		
200204	07/29/2002	Federal Housing Apartments	52	572.53	572.53
200210	09/15/2002	Clean Filters	4	678.85	678.85
				Client Totals:	1,251.38
					1,251.38
119 DBC Industrial Tech			Burt Franz		
Phone: 707 725-5305	Ext:	Phone 2:	Fax: 707 725-5306		
200218	10/23/2002	Water heater Install		3,233.00	
				Client Totals:	3,233.00
120 Highpoint Enterprises			Lila Josephs		
Phone: 800 455-6709	Ext:	Phone 2:	Fax: 707 655-2367		
200219	10/25/2002	Clean Filters		678.85	
				Client Totals:	678.85

Everything you need to call customers who have outstanding balances weekly!
NOTE: Name, Phone #, days aged and balance due can also be printed with client notes.



Managed Rite Construction

XXXX Main St
Anywhere CA 99999
800 555-5555

License: 999999

Reminder

Date: 05/03/2005

To: Christina Jimenez
100 First St South
Sonoma CA 95476

Statement Date: 05/03/2005

Invoice#	Due Date	Description	Invoice Total	Inv Bal	Past Due
2	02/15/2005	Misc	250.00	250.00	250.00
Totals:			250.00	250.00	250.00

Notify your overdue clients weekly on this report (11-1-11-21) until payment is made. These can be faxed or emailed.



Service Ledger

Client# 105 to 115, Period 1 to 12

Record	Trans#	Date	Description	Debit	Credit	Balance
105 - Robert Miller						Balance Fwd:
50	200214	09/07/2002	New Installation	311.70		311.70
Totals:				311.70		311.70
107 - D & R Glass						Balance Fwd:
46	200207	09/19/2002	Annual Service w/Monthly Insp	620.00		620.00
Totals:				620.00		620.00
112 - Henry White						Balance Fwd:
49	200212	09/05/2002	New Installation	3,728.04		3,728.04
56	200222	09/05/2002	Repair	3,962.60		7,690.64
57	227	09/19/2002	Partial Payment		2,500.00	5,190.64
Totals:				7,690.64	2,500.00	5,190.64
115 - Frazier Holmes						Balance Fwd:
53	200217	09/12/2002	Annual Service w/Monthly Insp	689.00		689.00
59	200223	09/12/2002	Replace Filters	924.00		1,613.00
Totals:				1,613.00		1,613.00
Grand Totals:				10,235.34	2,500.00	7,735.34

WOW! A General Ledger for only your Service Department!



Service Tax Report

Tax District in list 1,5, Period 1 to 12, Status < 5

Tax District	Rate	Non-Tax	Taxable	Sales Tax
1 California	7.00	7,166.08	16,185.10	1,132.97
5 Nevada	6.50		28,982.25	1,883.85
Total:		7,166.08	45,167.35	3,016.82

Sage Master Builder™ handles all local tax jurisdiction reporting needs. Tax reports by taxable, exempt status, various tax districts, school districts or countries.

Kitchen Appliances

Assembly#		Description	Standard	Value	You Save
200		Dispoal 3/4 hsp - purchase and installation	238.89	215.00	23.89
		1-year warranty			
		Add On	205.39	184.85	20.54
120	136.01	90	119.26		
210		Dispoal 1 hsp - purchase and installation	335.40	301.86	33.54
		7-year warranty			
		Add On	301.90	271.71	30.19
120	200.35	90	183.60		
220		Dispoal 1 hsp - replacement	254.40	228.96	25.44
		Add On	220.90	198.81	22.09
60	159.85	30	143.10		

Print Flat Rate Pricing book by page(s), part or class. No need to print an entire section at a time! This report (11-1-13-47) prints without detail. Print Report #11-1-13-76 which includes parts.

NOTE: Very important date is printed.

Kitchen Appliances

Assembly#	Description	Standard	Value	You Save
200 Disposal 3/4 hsp - purchase and installation				
1.0000	ea Disposal			
1.0000	Each 2" CI P-Trap			
2.0000	Each No Seep Wax Ring			
		238.89	215.00	23.89
	Add On	205.39	184.85	20.54
120	136.01 90 119.26			
210 Disposal 1 hsp - purchase and installation				
1.0000	ea Disposal - 1 Horsepower			
1.0000	Each 2" CI P-Trap			
2.0000	Each No Seep Wax Ring			
		335.40	301.86	33.54
	Add On	301.90	271.71	30.19
120	200.35 90 183.60			
220 Disposal 1 hsp - replacement				
1.0000	ea Disposal - 1 Horsepower			
1.0000	Each 2" CI P-Trap			
2.0000	Each No Seep Wax Ring			
		254.40	228.96	25.44
	Add On	220.90	198.81	22.09
60	159.85 30 143.10			

This report (11-1-13-76) prints Flat Rate Price book to show parts included in the assembly.



Service Employee Report

Status <= 4

Emp#	First	Last	Value	Material	Labor	Other
200	Dan E.	King	7,690.64			
201	Ralph	Cramdon	4,636.70			
264	Micheal	Fenton	5,141.08			
265	William	Johnson	3,019.85	348.85	550.00	
388	John	Malcolm	572.53			
401	Charlie	Musselwhite	3,911.85	278.85		
402	Elvin	Bishop	10,000.00			
Totals:			34,972.65	627.70	550.00	

See which technicians are
bringing in the most business!



Service Advertising Report

Source#	Description	Invoice#	Date	Invoices	Value	High	Low	Average
	Rec#			Client#	Description			Amount
1 Yellow Pages								
	21	200204	07/12/2002	118	Federal Government			572.53
	45	200201	08/30/2002	100	IMB Industries			108.00
	46	200207	09/19/2002	107	D & R Glass			620.00
Source Totals:				3	1,300.53	620.00	108.00	433.51
2 Newspaper								
	4	CON-101		101	Ralph Kramer			200.00
	48	200210	08/23/2002	118	Federal Government			678.85
	55	200219	09/25/2002	120	Highpoint Enterprises			678.85
Source Totals:				3	1,557.70	678.85	200.00	519.23
3 Builders Exchange								
	17	200203	07/13/2002	116	Grant Roberts			5,500.00
	47	200205	09/18/2002	117	John Ashley			4,325.00
	50	200214	09/07/2002	105	Robert Miller			311.70
	53	200217	09/12/2002	115	Frazier Holmes			689.00
	58	200223	09/12/2002	115	Frazier Holmes			924.00
Source Totals:				5	11,749.70	5,500.00	311.70	2,349.94
4 Cust. Referral								
	3	200202	08/22/2002	101	Ralph Kramer			5,141.08
	42	200206		101	Ralph Kramer			200.00
	49	200212	09/05/2002	112	Henry White			3,728.04
	51	200215	09/25/2002	1	Randy Smith			4,500.00
	52	200218	09/23/2002	119	DBC Industrial Tech			3,233.00
	56	200222	09/05/2002	112	Henry White			3,962.60
Source Totals:				6	20,764.72	5,141.08	200.00	3,460.79
Grand Totals:				17	35,372.65			2,080.74

Analyze how people hear about you. Are you getting the best return for your advertising dollar? Who are you targeting with each source of advertising?



Service Resource Report

by *Employee/Part*
Technician 200 to 201

Part#	Description	Unit	Quantity
200 Dan E. King	Service call		13
113	PLUMBER - ROUGH-IN	HR	28.32
119	PLUMBER - FIXTURES	HR	45
2661300349	BRAS OCR39-C CHR ANGLE VLV	Each	6
3305629570	AS 2258.125-020 WHT AFWALL AQMT BWL	Each	6
3887740500	PP 19-020 TRN-STP WST & OVERFLOW	Each	6
3887740539	PP 23-010 BATH COCK	Each	6
3992319438	NIBCO 5803-2-1-1/2 SPGXFIP ADAPTER	Each	6
3992320388	NIBCO 5811-14V-1-1/2 HXHXF VENT TEE	Each	6
3992320680	NIBCO 5892-1-1/2 PXSJ P-TRAP	Each	6
3992334766	NIBCO 701-D-1/2 CXC COUPL	Each	24
3992337528	NIBCO 714-1/2NOM CFXFC TEE	Each	18
4068815752	KOH K-11608-P-CP TREND B&S FCT	Each	6
4068815754	KOH K-11608-PC-CP TREND DVTR SPOUT	Each	6
4068815815	KOH K-11730-PC-CP TREND UNION CONN	Each	6
8416915481	EASTMAN ZRL612 FLEX RISER TUBE	Each	12
66238636084	CERRO L-1/2-SOFT-TUBE-PER-FOOT	Each	120
66835770010	ABSDV 150-PIP-P/FT ABS-DWV PIPE	Each	18
66836321860	PVCDV 400-CLF HUB CLOSET FLANGE	Each	6
67102460365	F-STONE 6036TS-3W-R-WHT SHWR/BATH	Each	6
67125202250	SPEAKMAN S-2252-AF SHWR HEAD W/REG	Each	6
67143020475	CHATHAM 8F 7-1/2I SHWR ARM W/FLANGE	Each	6
67171910315	DEBEST 510 WALL HUNG BOWL WAX	Each	6
201 Ralph Cramdon	Premier Kitchen Faucet Single Handle w/Spray	Each	5
19381	FCT MOEN SINK W/SPRAY CP	EA	6

See, at a glance, if a particular technician favors a particular part or manufacturer. Maybe that is what makes your best tech's customers happy!