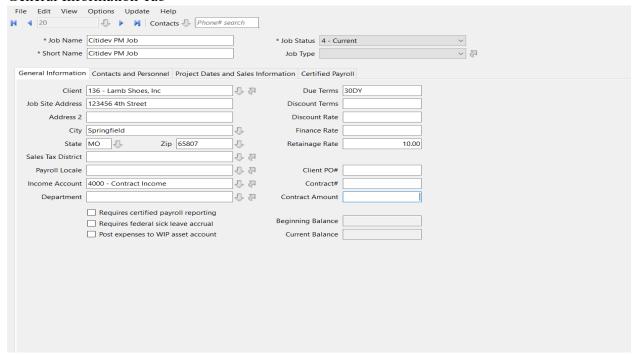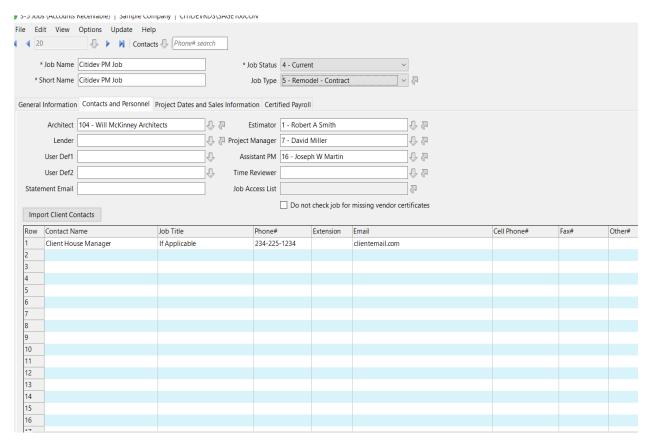# Sage 100 Contractor Standard Job Flow

Step One

Set Up Job Information
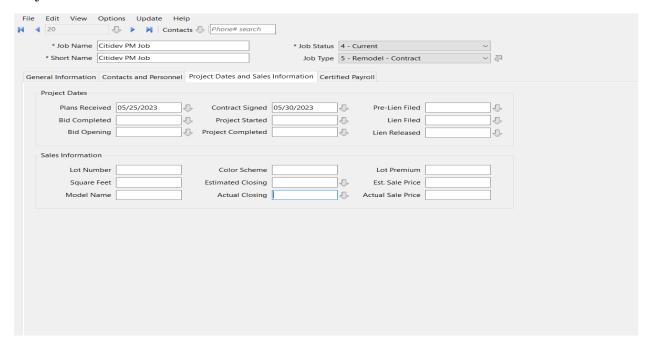3 – Accounts receivable and 5 - Jobs Set up your job information in each tab
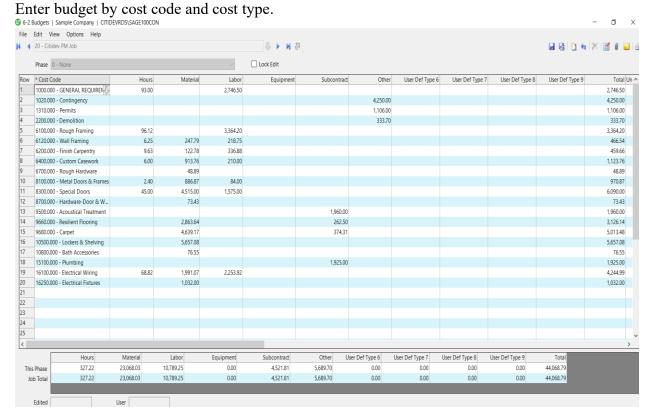General Information Tab
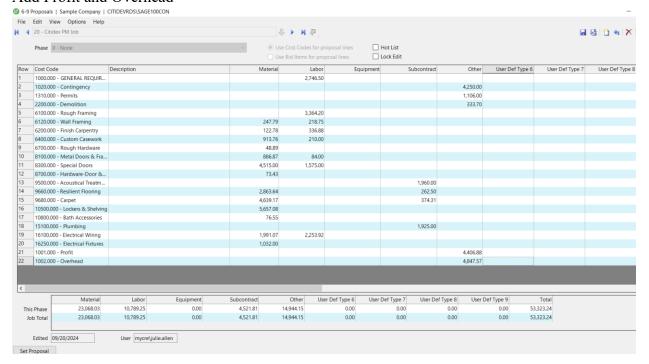

Contacts and Personal Tab

Project and Dates Tab

File   Edit   View   Options   Update   Help

* Job Name	Citidev PM Job	* Job Status	4 - Current
* Short Name	Citidev PM Job	Job Type	5 - Remodel - Contract

General Information   Contacts and Personnel   Project Dates and Sales Information   Certified Payroll

Project Dates

Plans Received	05/25/2023	Contract Signed	05/30/2023	Pre-Lien Filed	
Bid Completed		Project Started		Lien Filed	
Bid Opening		Project Completed		Lien Released	

Sales Information

Lot Number		Color Scheme		Lot Premium	
Square Feet		Estimated Closing		Est. Sale Price	
Model Name		Actual Closing		Actual Sale Price	

Step Two

Setting up Job Budget
6 – Project management 2 – Budget
Enter budget by cost code and cost type.

6-2 Budgets | Sample Company | CITIDEVRDS\SAGE100CON

File   Edit   View   Options   Help

20 - Citidev PM Job

Phase 0 - None   ☐ Lock Edit

Row	* Cost Code	Hours	Material	Labor	Equipment	Subcontract	Other	User Def Type 6	User Def Type 7	User Def Type 8	User Def Type 9	Total	Un
1	1000.000 - GENERAL REQUIREM	93.00		2,746.50								2,746.50	
2	1020.000 - Contingency						4,250.00					4,250.00	
3	1310.000 - Permits						1,106.00					1,106.00	
4	2200.000 - Demolition						333.70					333.70	
5	6100.000 - Rough Framing	96.12		3,364.20								3,364.20	
6	6120.000 - Wall Framing	6.25	247.79	218.75								466.54	
7	6200.000 - Finish Carpentry	9.63	122.78	336.88								459.66	
8	6400.000 - Custom Casework	6.00	913.76	210.00								1,123.76	
9	6700.000 - Rough Hardware		48.89									48.89	
10	8100.000 - Metal Doors & Frames	2.40	886.87	84.00								970.87	
11	8300.000 - Special Doors	45.00	4,515.00	1,575.00								6,090.00	
12	8700.000 - Hardware-Door & W...		73.43									73.43	
13	9500.000 - Acoustical Treatment					1,960.00						1,960.00	
14	9660.000 - Resilient Flooring		2,863.64			262.50						3,126.14	
15	9680.000 - Carpet		4,639.17			374.31						5,013.48	
16	10500.000 - Lockers & Shelving		5,657.08									5,657.08	
17	10800.000 - Bath Accessories		76.55									76.55	
18	15100.000 - Plumbing					1,925.00						1,925.00	
19	16100.000 - Electrical Wiring	68.82	1,991.07	2,253.92								4,244.99	
20	16250.000 - Electrical Fixtures		1,032.00									1,032.00	
21													
22													
23													
24													
25													

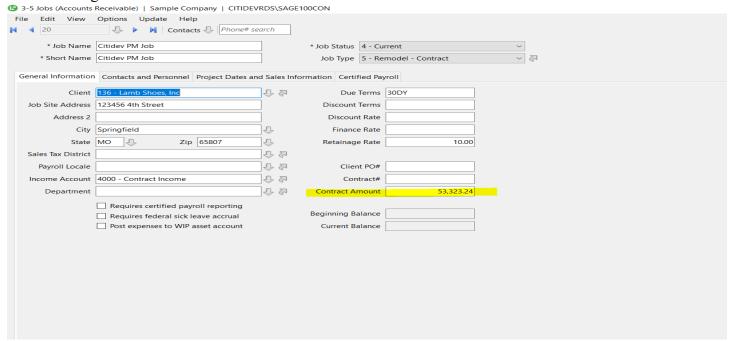|	Hours	Material	Labor	Equipment	Subcontract	Other	User Def Type 6	User Def Type 7	User Def Type 8	User Def Type 9	Total
This Phase	327.22	23,068.03	10,789.25	0.00	4,521.81	5,689.70	0.00	0.00	0.00	0.00	44,068.79
Job Total	327.22	23,068.03	10,789.25	0.00	4,521.81	5,689.70	0.00	0.00	0.00	0.00	44,068.79

Edited _____   User _____

Step Three

6- Project Management – 9 – Proposal
Under Options, Import Budget by Cost Codes
Add Profit and Overhead

Row	Cost Code	Description	Material	Labor	Equipment	Subcontract	Other	User Def Type 6	User Def Type 7	User Def Type 8
1	1000.000 – GENERAL REQUIR...			2,746.50						
2	1020.000 – Contingency						4,250.00			
3	1310.000 – Permits						1,106.00			
4	2200.000 – Demolition						333.70			
5	6100.000 – Rough Framing			3,364.20						
6	6120.000 – Wall Framing		247.79	218.75						
7	6200.000 – Finish Carpentry		122.78	336.88						
8	6400.000 – Custom Casework		913.76	210.00						
9	6700.000 – Rough Hardware		48.89							
10	8100.000 – Metal Doors & Fra...		886.87	84.00						
11	8300.000 – Special Doors		4,515.00	1,575.00						
12	8700.000 – Hardware-Door &...		73.43							
13	9500.000 – Acoustical Treatm...						1,960.00			
14	9660.000 – Resilient Flooring		2,863.64				262.50			
15	9680.000 – Carpet		4,639.17				374.31			
16	10500.000 – Lockers & Shelving		5,657.08							
17	10800.000 – Bath Accessories		76.55							
18	15100.000 – Plumbing						1,925.00			
19	16100.000 – Electrical Wiring		1,991.07	2,253.92						
20	16250.000 – Electrical Fixtures		1,032.00							
21	1001.000 – Profit						4,406.88			
22	1002.000 – Overhead						4,847.57			

	Material	Labor	Equipment	Subcontract	Other	User Def Type 6	User Def Type 7	User Def Type 8	User Def Type 9	Total
This Phase	23,068.03	10,789.25	0.00	4,521.81	14,944.15	0.00	0.00	0.00	0.00	53,323.24
Job Total	23,068.03	10,789.25	0.00	4,521.81	14,944.15	0.00	0.00	0.00	0.00	53,323.24

Edited 09/20/2024   User mycre\julie.allen

Set Proposal

Step Four

Enter the Original Contract Amount in the Job Cost Screen
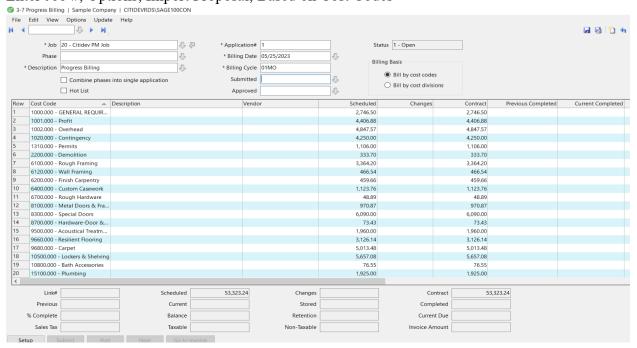

The Delta between the Client Contract amount and your budget is the estimated profitability from the start of the project.

Over/Under Billings
09/20/24

citidev   Managed Rite Construction

Over/Under Billings
Extended
Job 20 to 20

Job Supervisor	Job#	Total Contract	Est. Cost At Completion	Estimated Gross Profit	Percent Complete	Cumulative Total To Date			Over Billed	Under Billed	Estimated Total at Completion		
						Billed	Costs	Income			Earned Revenue	Cost of Revenue	Gross Profit
Current (Job Status = 4)													
Joseph Martin	20 - Citidev PM Job	53,323.24	44,068.79	9,254.45									
	Total Current:	53,323.24	44,068.79	9,254.45									
	Grand Total:	53,323.24	44,068.79	9,254.45									

Step Five

Creating the Schedule of Values/Progress Billing
3 – Accounts Receivable, 7 – Progress Billing
Enter Job #, Options, Import Proposal, Based on Cost Codes

	* Job	20 - Citidev PM Job		* Application#	1		Status	1 - Open

Phase

* Description   Progress Billing

☐ Combine phases into single application
☐ Hot List

* Billing Date   05/25/2023
* Billing Cycle   01MO
Submitted
Approved

Billing Basis
◉ Bill by cost codes
○ Bill by cost divisions

Row	Cost Code	Description	Vendor	Scheduled	Changes	Contract	Previous Completed	Current Completed
1	1000.000 - GENERAL REQUIR...			2,746.50		2,746.50		
2	1001.000 - Profit			4,406.88		4,406.88		
3	1002.000 - Overhead			4,847.57		4,847.57		
4	1020.000 - Contingency			4,250.00		4,250.00		
5	1310.000 - Permits			1,106.00		1,106.00		
6	2200.000 - Demolition			333.70		333.70		
7	6100.000 - Rough Framing			3,364.20		3,364.20		
8	6120.000 - Wall Framing			466.54		466.54		
9	6200.000 - Finish Carpentry			459.66		459.66		
10	6400.000 - Custom Casework			1,123.76		1,123.76		
11	6700.000 - Rough Hardware			48.89		48.89		
12	8100.000 - Metal Doors & Fra...			970.87		970.87		
13	8300.000 - Special Doors			6,090.00		6,090.00		
14	8700.000 - Hardware-Door &...			73.43		73.43		
15	9500.000 - Acoustical Treatm...			1,960.00		1,960.00		
16	9660.000 - Resilient Flooring			3,126.14		3,126.14		
17	9680.000 - Carpet			5,013.48		5,013.48		
18	10500.000 - Lockers & Shelving			5,657.08		5,657.08		
19	10800.000 - Bath Accessories			76.55		76.55		
20	15100.000 - Plumbing			1,925.00		1,925.00		

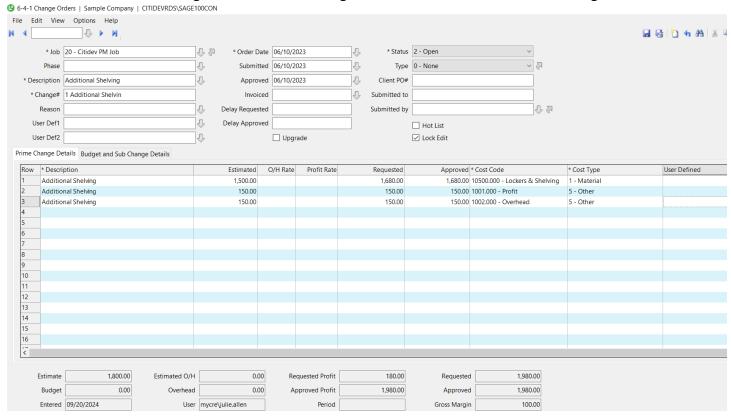| Link#		Scheduled	53,323.24	Changes		Contract	53,323.24
Previous		Current		Stored		Completed	
% Complete		Balance		Retention		Current Due	
Sales Tax		Taxable		Non-Taxable		Invoice Amount	

Setup   Submit   Post   Next   Go to Invoice

From 6 – Project Management and 1- Reports, select 2 – Job Cost Summary and report 41 – By Cost Code
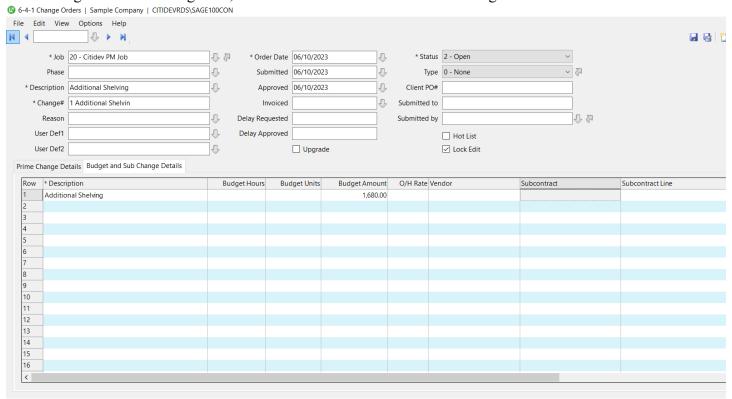Enter the costs into the progress billing and calculate

Step Six

Change Orders
In 6 – 4 – 1, The Prime Change Tab, Enter the Change increase/decrease for the client change.
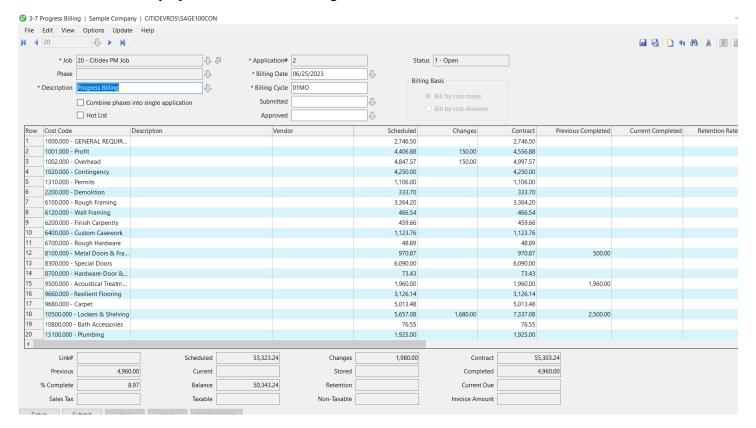

In the Budget and Sub Change Tab, enter the costs associated with the change order

For the Next Progress Billing, you can add the approved client change order to the progress billing by selecting Update, Change Orders, Add to existing lines.

This will automatically update the contract billing amount.

This will also update the budget associated with the cost of the change order

Review Job cost Summary