



# Sage 100 REPORTS

CUSTOM  
REPORTS  
Sage 100  
Contractor

JIM SCHUETT  
480.277.7550  
Jim@Sage100  
Reports.com

Sage100Reports.com  
**BLS** **BOTTOM-LINE**  
DESIGN SERVICES  
607 W Flannagon St.  
Idaho Falls, ID 83402

**SAMPLE CUSTOM REPORT "SCOPE OF WORK"**

**www.Sage100Reports.com**

## SCOPE WORKSHEET

*This worksheet is provided as a guide, to provide details for the report you are requesting.  
Anything that is unclear, just leave it for questions later.*

### SCOPE OF WORK FOR NEW CUSTOM REPORT REQUEST

This description of my new custom report request represents the entire scope, and is the basis for my estimated hours received for completion of this custom report. Any changes may affect the quoted price and delivery date.

**I AGREE:**

Enter Your Full Name Below

### YOUR CONTACT INFO

YOUR NAME:

YOUR COMPANY'S NAME:

YOUR COMPANY'S ADDRESS:

YOUR COMPANY PHONE / EXT #

YOUR EMAIL:

DIRECT #

YOUR EMAIL:

### YOUR SOFTWARE INFO

YOUR SOFTWARE: **SAGE 100 CONTRACTOR**

VERSION #:

HOW LONG HAVE YOU USED:

### MODULES YOU HAVE LICENSED: (Circle)

Document Control

Estimating

Service Receivables

Inventory

Equipment Management

Plug-in for ACT!

**REPORT TITLE AND MENU #**

TITLE: \_\_\_\_\_

REPORT # \_\_\_\_\_

Example: 06-01-02-12 (Sage menu and report #)

Please send a screenshot of your report selection screen where you want the report to be located.

**REPORT SIZE & SHAPE**

- |                                     |           |                          |                        |
|-------------------------------------|-----------|--------------------------|------------------------|
| <input type="checkbox"/>            | LANDSCAPE | <input type="checkbox"/> | LETTER SIZE (8½X11)    |
| <input checked="" type="checkbox"/> | PORTRAIT  | <input type="checkbox"/> | LEGAL SIZE (8½X14)     |
|                                     |           | <input type="checkbox"/> | TABLOID (11X17)        |
|                                     |           | <input type="checkbox"/> | ALWAYS EXPORT TO EXCEL |

**GROUPINGS / SUBTOTALS:**

Groups provide subtotalling for the data within the group.

**GROUPS / SUBTITLES**

(Up to 3 Groupings)

- 1
- 2
- 3

<b>ENTER TYPE OF DATA FOR EACH GROUP BELOW</b>	
<i>(Up to 3)</i>	
	SEE
	EXAMPLES
	BELOW

**EXAMPLES:**

JOBS	AR INVOICES	VENDORS	PAYROLL	JOB COSTS	SERVICE
JOB #	INV DATE	NAME (ALPHA)	EMPLOYEE #	JOB #	CLIENT #
PHASE #	RECORD #	NONE	PAY PER END	COST TYPE #	LOCATION
COST CODE #	NONE	NONE	PAY TYPE #	COST CODE #	DATE



**ADDITIONAL INSTRUCTIONS:**

*PLEASE EXPLAIN  
AS MUCH AS POSSIBLE.*

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10


**QUESTIONS / COMMENTS:**

Thank you for taking the time to provide this information. It will assist in the creation of your report.  
RETURN THIS FORM TO [JIM@SAGE100REPORTS.COM](mailto:JIM@SAGE100REPORTS.COM)