

Accordant Bulletin

Welcome to the Accordant Bulletin for Sage Master Builder users!

February 2011

Our goal is to provide you with tips and tricks to make you an expert in Sage Master Builder software.

Accordant's consultants will teach you how to improve your productivity and knowledge of this powerful solution.



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Our Sage Master Builder expert this month is Peg Dolente. Peg became a Master Builder consultant in 2004 with 15 years of previous experience working as a technology consultant and CPA. She has helped many companies master a variety of accounting software packages. Using tools such as Crystal Reports, Liberty Reports and Microsoft Office, Peg specializes in helping clients get the information they need to run their businesses effectively.



Sage Master Builder Version 16

Key Enhancements:

- *Improved Export to Excel Feature*
- *Centralized Contact Management Menu Option*
- *New Contact Grids on Jobs, Clients, Vendors and Employees*
- *Extensive Updates to Report Writer and Form Design*

Here are Peg's tips on Using Master Builder's Queries and Excel Pivot Tables To Create Reports:

Ever wish you could see a summary of job costs by job and division, overtime hours by employee, etc.? This type of analysis is easy to do with Master Builder's query tool and Excel. You can export data from many MB screens directly to Excel. Once the data is in Excel, create a pivot table in which you decide what the rows and columns will be. For example, to analyze your job costs by division: Click the MB query button (binoculars) on the toolbar of 6-3. The Version 16 wizard will walk you through steps. Include fields from "Job Costs" such as job, cost, vendor, etc. and division number from the "Cost Code" table. Set the Selection Criteria to include "Status=1" and "Period Between." Run the query for a range of periods and click the print button. On the next screen, click the green

Training Options

Get the most out of your Sage Master Builder software investment with well-trained, knowledgeable staff. If you need help with reports, customization, or training of new employees, Accordant can help you!

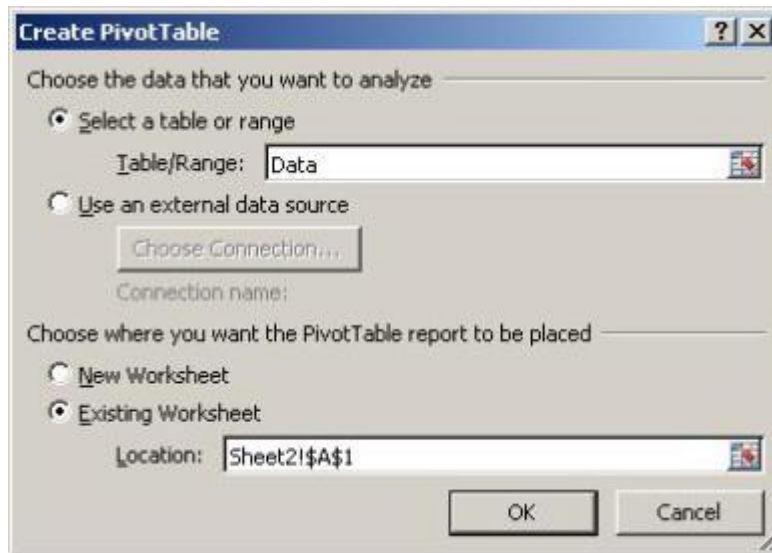
Please contact Swati Raje, Director of Client Services at 973-887-8900

Excel button.

In Excel, delete all the rows except for one header and the data lines.

Highlight the range of data including the header row. While it is highlighted, assign a name to the range by typing "Data" in the white box in the upper left hand corner above the column labels.

Go to a new worksheet and click Insert/Pivot Table and complete the dialog box as shown:



You will then see the "Pivot Table Field List" on the right side of your screen. Here is where you can drag fields to the Row, Column and Values boxes at the bottom of the box. Try dragging "Job" to the Row Labels box, "Division" to Column Labels and "Cost" to Values. You've just created a high level analysis of costs by jobs and division! Change the analysis easily by dragging different fields to the row and column boxes.

Sage Master Builder Lunch and Learn Presentation

Brown bag your lunch and join us to learn more about this topic:

Using Master Builder's Queries and Excel Pivot Tables To Create Reports

Date: Wednesday, March 2nd from 12:00pm-12:30pm

Presented by Peg Dolente.

[Register Here](#)

x105. Swati will work with you to set up an appointment for a Master Builder consultant to come on-site for any training you may need.

Authorized Partner

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