



Sage 100 Contractor - CFO on the go - Training Packages

Core Module Training	STANDARD	PREMIUM
New Company Setup		
CFO to provide training on how to set up Sage 100 Contractor:		
Company Information	X	X
Chart of Accounts	X	X
Cost Codes/Divisions	X	X
Vendor and Vendor types	X	X
Sales taxes	X	X
Departments and subaccounts	X	X
Employees, Employee positions, Workers Comp, Payroll Calculations, unions	X	X
Change Order Types	X	X
Add client logo	X	X
Purchase Order and SubContract Types	X	X
Cost Types	X	X
Jobs and Job Types	X	X
AR Clients, Client Status and Types	X	X
Check modifications (limit 2)	X	X
Security Groups and Users	X	X
CFO sets up your new company with:		
Company Information		X
Standard Payroll Calculations (limit 2 unions)		X
Chart of Accounts using Sage Pre-Built selections (plus up to 20 custom)		X
Cost Codes/Divisons		X
Vendor Types		X
Departments and subaccounts		X
Change Order Types		X
Add client logo		X
Purchase Order and SubContract Types		X
Cost Types		X
Job Types		X
AR Client status and Types		X
Check Format modifications		X

Workflow Training

Training provided for core Sage 100 Contractor:

General Ledger: Checks, Deposits, Journal Entries, Bank Reconciliation

X

X

Accounts Receivable: Receivable Invoices/Credit, Cash Receipts, Statements, Progress Billing, Loan Draw Requests

X

X

Payroll: Payroll records, Compute Payroll, Payroll Checks, Post

X

X

Project Management: Budgets, Job Costs, PO's & Subcontracts, Proposal, Change Orders

X

X

Month End Training

X

X

Year End Training

X

X

Reports:

Review of reporting requirements

X

Customize Purchase Order and Subcontracts (up to 2 pages)

X

Customize AR invoicing

X

Startup Entries & Post Live Training

Training for entering start up balances:

GL start up balances

X

X

AP start up invoices

X

X

AR start up invoices

X

X

Jobs start up balances

X

X

Payroll employee start up balances

X

Follow up session after Go-Live

X

Month End Assistance

X

Year End Assistance

X

Total Price

\$*

\$*

* Call for Pricing

The following is required to accomplish within the fixed price structure:

- All assignments must be completed on the scheduled date
- All appointments must be held on the scheduled date. There is a cancellation charge that is covered in the PSA.
- The following classes need to be attended and attendance tracked by employee:
 - New Customer Training Courses
 - Sage 100 CFRM4271 - Basic Form Design
 - Sage 100 CJOB4502.1 - Day in theLife of a Job
 - Sage 100 CJOB4502.2 - Day in the Life of a Job Part 2
 - Sage 100 CJOB4210 - Job Cost Profitability Reports
 - Sage 100 CJOB4220 - Job Cost - Audit Projects
- The appropriate people will be required to complete the training eBooks from Jim Saad.
- Some of the information can be imported in electronically. Your consultant can help determine the cost of this service.
- All training is done over the web; if onsite training is required then travel time and mileage will be billed with the current rates in your Professional Services Agreement.



Sage 100 Contractor - CFO on the go Addon Training Packages

Addon Modules Training

Equipment	
CFO to provide training on how to set up:	
Equipment and Equipment Types	X
Complete the Cost Recovery Worksheet	X
Cost and Billing Rates	X
Depreciation and Loan Payments	X
Workflow training for equipment module:	
Repair and Maintenance Costs	X
Payroll Costs - equipment costing to jobs	X
Depreciation	X
Loan Payments	X
Equipment Total	\$*

Inventory	
CFO provides training on how to set up:	
Parts	X
Parts Classes	X
Inventory Location	X
CFO provides workflow training for Inventory module:	
Invoicing for Parts	X
Receiving Inventory	X
Inventory Allocation	X
Inventory Total	\$*

Estimating	
CFO provides training on how to set up:	
Parts	X
Assemblies	X
Parts/Assembly Classes	X
CFO provides workflow training for Estimating module:	
Takeoffs	X
Add parts/Update prices	X
Maintain Parts Database	X
Estimating Total	\$*

Service and Receivables	
CFO provides training on how to set up:	
Parts	X
Assemblies	X
Part/Assembly Classes	X
CFO provides workflow training for service receivable module:	
Parts	X
Assemblies	X
Dispatch Board	X
Work Orders/Invoices/Credits	X
Service and Receivables Total	\$*

* Call for Pricing