



Sage Master Builder™ Integrator

Direct Integration: The Sage Master Builder integration provides direct integration between WinEst project estimating data and the Master Builder cost accounting solution.

Job Creation

- Using your estimate information, you can automatically set up new jobs.
- Supports the creation of new Master Builder jobs as well as updating pre-existing jobs.

Client Creation

- Using estimate information you can automatically setup new customers.
- WinEst assigns preexisting customer codes to new projects or creates new customers when required.

Contract Creation

- A completed WinEst estimate can contain the basis for a documented project contract.
- Automatically transfers the total billable price to Master Builder as a job contract value.

Budget Creation by Cost Code

- WinEst job cost codes can transfer estimated costs to Sage Master Builder Budget codes, automatically setting up the cost basis for all cost reports in Master Builder.

Proposal Creation

- WinEst has the ability to automatically allocate markups across estimate items and to enable the transfer of information to Master Builder in the form of billing proposals.

Billing Documents

- Proposal information from WinEst is used to automatically setup billing documents in Intuit MasterBuilder.

Subcontractor Creation

- With the addition of the WinEst Bids & Quotes option, assigned ITB's are transferred to the Master Builder subcontract control system as subcontractors in preparation for the posting of vendor accounts payable invoices.

Purchase Order Creation

- With the addition of the WinEst Bids & Quotes option, assigned requests for bid's are transferred to the Master Builder purchase order control system as purchase orders in preparation for the posting of vendor accounts payable invoices.

Phase Creation

- Any of the seven base work breakdown structures can be transferred to the Master Builder phase tracking system.
- Individual phases can be created during the integration by entering a new phase and description on the integration option screen.

Bid Items

- When using WinEst Pro Plus and WinEst eTeam systems, bid item information can optionally be sent to the Master Builder bid item tracking system.
- Proposals and billing documents can also be optionally grouped by bid item during integration.

Change Orders

- Individual estimates can be sent to the Master Builder system as change orders to pre-existing jobs. Each change order is created with cost budgets as well as billing information.