



**Sage 100
REPORTS**

CUSTOM
REPORTS
Sage 100
Contractor

JIM SCHUETT
480.277.7550
Jim@Sage100
Reports.com

Sage100Reports.com



3317 Putterwood Ct.,
Mason, OH 45040

TERMS OF SERVICE 2024 *Effective February 15, 2024*

Thank You for your request for Report Writing or Consulting Services.

To get started, please read, and sign below, indicating you agree with and will provide payment card info, with your authorization to process your card as described below. *Paid invoicing will be provided.*

REPORT WRITING (aka Project):

ALL REPORT WRITING WILL BE PROVIDED STRICTLY ON AN HOURLY BASIS.

Best efforts are always made to successfully complete and provide the requested Project. You agree to pay for time spent in developing the Project even if the Project can't be completed. Working with the Sage primary table structure sometimes makes all efforts fail, and the Project is abandoned. The cause is frequently the additional changes to the original scope of work. Time spent is still due and collected as the Project progresses.

1. Scope of Work Development

- Non-refundable \$150 fee for Scope of Work development for each Project.
- This is processed at the beginning automatically.
- If the Project is completed and delivered, this fee may be refunded.

2. Work on Your Project

- After Scope is determined, and approved, work on your Project will begin according to Project Timetable.
- **Deposit:** Credit card deposit of up to 50% of estimated hours required to start Project.

3. Project Timetable

- Anticipated Timetable to start and complete Project will be provided at Scope completion. Many factors can change the Timetable so keeping in contact is important to monitor the process.

CREDIT CARD PROCESSING:

- **Your card will be processed automatically** (*This is your notification of the charging to your card to be done.*)
 1. Scope of Work Fee
 2. 50% deposit
 3. Balance due before delivery. (May charged be at 75% or 100% completion, depending on Project).
- Credit card payment in full always required before report delivery to Client.
- Detailed Scope of Work required for each Project. Changes to Scope may result in extra hours.
- Billing of Project will be in hours, even if more than estimated hours.

Some Projects may not be able to be completed per Scope of Work, due to issues with Sage, Table structure, or Client lack of approval of Final Project even when Project complies with Scope of Work. All hours will be charged and payment processed.

x _____ **INITIAL HERE for the section above.**

PRE-PAID TIME (PPT): All PPT funds are paid in advance for reduced hourly rates. **Ask about PPT.**

CONSULTING & TRAINING

- All Consulting & Training will be performed on an hourly basis, hourly rate is \$195/hour.
- Credit card deposit of "X" hours of time required before project begins. ("X" varies by project length)
- All scheduled training session payable in advance of sessions.

SAGE DATABASE: Provide a backup copy of your company database to work in (required on most Projects).

I agree to these Terms of Service above and authorize payment using my credit card indicated below for these services. I am an authorized party on this credit card.

Authorized Signature _____
 Print Name _____
 Company Name _____
 Street Address _____
 City, State, Zip _____
 Phone _____
 Email _____

CREDIT CARD:



Card # _____
 Exp Date: _____
 Security Code: _____
 Name on Card: _____
 Card Billing Address: same as above.
 Date Signed _____



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BOS **BOTTOM-LINE**
DESIGN SERVICES

3317 Putterwood Ct.,
Mason, OH 45040

TERMS OF SERVICE 2024 *Effective January 1, 2024*

Definitions:

1. **“Project”** – A Project is generally a “Custom Report” but can also be “Training” or any other single item like purchasing my Book, etc. All Projects are handled separately to keep discussions simple and separate.
2. **“Terms of Service”** (TOS) - I have attached my TOS document to explain what you can expect in the way of costs for your Project.
 - a. The TOS provides you with your Project’s possible cost, and timing of payments.
 - i. **One Project:** Single project requests are done on an hourly basis.
 - ii. **Multiple Projects:** When you anticipate more than one project, each will be done at an hourly rate. You may want to choose our PPT Plan (Pre-Paid Time) which reduces the hourly rate based on purchasing 1 or more 15-Hour blocks of time. Please ask for details. NOTE: PPT hours NEVER expire, but are NOT refundable.
3. **“Scope of Work”** (Scope)– Determining the Scope of Work is important to do at the very beginning, as quoting the Scope determines the estimated cost range. When the Scope changes, both the timetable (for completion) and the cost range may be affected, It also is common to realize that as the Project moves forward, new thoughts may need to adjust the Scope, and that is expected.
4. **“Time-Table”** - I try to estimate the amount of time to both start and complete your Project. Please understand that the Time-Table may change for several reasons. I am very busy, usually with a backlog of pending Projects, but Your Project is important, and I will get it done as quickly as possible.
5. **“Minimum Charge”** – For a Custom Report, *(after an initial brief discussion)* all Projects have a Scope fee of \$150 to cover the review and assessment of your Project’s viability. (“Can I do your Project”). This is paid at the beginning of the assessment. If the Custom Report progresses and is completed, the fee may be refunded in your Project’s final cost.
6. **“Average Cost”** - Most Custom Reports end up costing between \$425 and \$695, although more complicated reports can be much more expensive, The number of columns is a definite factor in final cost.