

NEWS

August
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Consultant's Corner



Photo: Keith Andrews, Accordant Consultant

Welcome to the Consultant's Corner, dedicated to providing you with tips and hints for more efficient and effective use of Sage Timberline software. Each month, one of our certified, professional consultants will provide you with tips on how to get more bang for your buck!

This month, Consultant's Corner is spotlighting Keith Andrews. Keith has trained Timberline users for 9 years and is certified in Timberline Construction Accounting and Property Management. In addition to consulting, Keith is one of Accordant's



Accordant

Creating Harmony between People, Business, and Technology

800-363-1002

Boost Profitability and Reduce Overhead with Project Management

You're in business to win contracts and complete successful projects. One way to boost profitability and reduce overhead is through efficient project management. The Sage Timberline Office project management is engineered to help you do precisely that. With exceptional flexibility, Project Management can adapt to your company's specific project management processes. Integration with other modules increases efficiency by eliminating duplication of effort. A centralized database provides easy access to vital information for both your Accounting and Project Management teams.

CENTRALIZED DATA

Project management is integrated with Sage Timberline Office financial applications, so all authorized users have a complete picture of the project. From within Project Management, you can issue contracts, subcontracts, purchase orders, and change orders, and then release these items to accounting for review, approval, and use. Project Management allows you to review all prime contracts, subcontracts, updated plans and drawings, change orders, purchase orders, meeting minutes, requests for information (RFIs), and other project-related documents from one application. You can set up your job in

classroom trainers.

Tips this month from Keith:

"Did you know that if you are looking at a setup screen, such as Job, Cost code, GL account, etc. the F8 key can scroll you forward one record at a time and the F7 key can scroll you backward? Hold either one down, and you can scroll through them quickly without using the mouse."

"Did you know that virtually any report can be sent via email as a PDF file by simply clicking the "SEND" button at the bottom of the report prompt window?"

"Did you know that, under "Tools-Macros" in any application, a Macro can be setup to print a group of reports by simply running the macro? This Macro can also be saved on your Windows desktop and run without ever starting up any Sage Timberline Software application!"

Want to schedule Keith as your consultant? Contact Judy Yannotta at 973-993-3138 or email JYannotta@accordantco.com

About Accordant

Welcome to the Accordant Newsletter! Our goal is to educate Sage Timberline Office users by providing valuable information on products, training, and tricks of the trade. We also plan to share Accordant & Sage

Project Management before you have all the accounting details and later renumber the job to fit your company standards and release all information to accounting for review, approval, and use. As new project information is entered in the accounting or operations modules, all updates appear in Project Management and related accounting applications.

EASY TO USE

Project Management was designed to be intuitive and easy to use. It also is easy to learn because the automated processes reflect the way you do business. Electronic forms are similar to paper documents currently used in the construction industry. One screen is all you need to set up a new RFI. Defaults and pre-filled fields help speed data entry while improving accuracy.

REAL-TIME INFORMATION

In the middle of a fast-paced job, you need accurate information-quickly. As your centralized source of information, Project Management will always provide the current picture of your projects. Thanks to integration with the rest of Sage Timberline Office, there's no manual synchronization with the accounting modules; it's all automatic. With project information stored in a central database, your project information is always current and accessible for both project management and accounting staff. Inquiries are just a mouse-click away and allow you to find the information you are looking for and drill-down for additional detail.

DOCUMENT TRACKING

Most would agree that a key component of efficient project management is organization. You need a centralized place to store job-related data and a quick method to access that data. You don't want to waste time hunting around in file cabinets or on co-worker's desktops.

Project Management gives you the tools to create and track common project documents, such as RFIs, meeting minutes, submittals, and transmittals. Using inquiries or reports you can see which RFIs haven't yet been approved

Timberline news and upcoming events.

Accordant provides leading-edge business solutions to construction, service & real estate businesses in New York, New Jersey, Connecticut and Pennsylvania. We specialize in the implementation, consulting, and training of Sage Timberline Office Solutions.

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and gauge the potential impact of any outstanding requests on a project's cost and schedule. The central database of job information lets you easily find and review any project-related document. You'll see which tasks remain open to help ensure that no task is overlooked.

CLEAR COMMUNICATION

Project Management makes email correspondence an accessible part of the project record through the Correspondence Log feature. This feature allows you to access Microsoft Outlook email, Word, and Excel documents from the Project Management centralized database. This helps you maintain a complete picture of all project correspondence. You also can send documents such as RFIs, submittals, and transmittals to the proper recipient directly from an entry screen via email or fax.

Depending on the size of the project, there may be hundreds of individuals involved. From within Project Management, you can create a contact list including job-specific contact information. Even create various distribution lists containing groups or sub-groups of those contacts to make communication easier.

Meetings are a necessary part of any job. With Project Management you can create meeting agendas and record proceedings, action items, and persons accountable. Outstanding items automatically roll forward into the next meeting agenda, saving you time and effort and ensuring nothing gets forgotten.

To make certain that all concerned parties receive current drawings, Project Management documents the distribution so you know who received the drawings, what version, and when they received them.

Project Management is integrated with Address Book, which will streamline your workflow, reporting, and forms generation. Now you can take advantage of all Address Book contacts and send features.

CHANGE ORDER PROCESSING

Change orders are hard enough on your job's schedule



without becoming a burden to quote and manage. Project Management helps you better control the change order process. You can quickly identify potential change orders, request quotes, price out the changes, and issue pending and approved changes to your company's accounting department. Record all the details of those change orders, such as when quotes are due and from whom. Data entry is kept to a minimum as many fields are pre-filled with information from the original commitments or change requests.

ACCESS TO INFORMATION

Virtually anything you need to know about the status of a project is at your fingertips. For example, when a customer asks if you received payment on the last invoice, you can quickly pull it up and check. Unposted costs can be included on your reports to provide a realistic view of where the job is at financially. Here's a sampling of some of the information you can discover through reports and inquiries in Project Management:

Use the Job Overview inquiry to see the status of contracts, profit, billings, costs, cash, RFIs, and submittals from one convenient location. The Job Status Overview combines accounting and project management detail on one report making it a useful big-picture view of the job.

The Job Cost reports offer you a date range selection, monthly cost, and can include cost type analysis. The Contract Status report shows Accounts Receivable invoices and payments. Inquire into purchase orders and subcontracts including Accounts Payable invoices and checks. View submittal logs by date, company, and status. Monitor submittal logs by company and status, and transmittal logs by date, company, and status. More than 100 standard reports and inquiries make your project information accessible.

WHAT'S NEW IN VERSION 9.3

Sage Timberline Office Version 9.3 include dozens of useful features and enhancements, including several to Project Management.

* A new Commitment Change Order (CCO) feature was

added to further integrate the Project Management Change Management system, allowing for true linking of CCOs to owner-side change orders.

* New inquiries have been added to the Inquiry menu to help you find Commitment Change Order information.

* All Project Management Crystal Reports have been upgraded to the new Crystal Reports, version 10 format. If you're currently using Project Management, but have not yet updated to Version 9.3, these are some good reasons to do so.

POWERFUL TOOL

The Sage Timberline Office project management is a powerful organizational tool that can serve as the hub of your organization's job activity. Please give Accordant a call at 973-993-3138 for further information, pricing, or a demonstration.

SAGE TIMBERLINE OFFICE

Upcoming Webinars and Training Classes

For more information or to register for a training session, please click on a link below or call Kathy Morris at 973-993-3138 or email kmorris@accordantco.com. Accordant training classes are held in Morristown, NJ at the Headquarters Plaza.

Upcoming Webinars

Document Management

allows you to organize all important documents and files for fast, easy storage, retrieval, and routing.

Aug 10, 16

Sept 7, 12, 14, 20

Field2Base

is a wireless field service and two way communication tool that allows you to increase the productivity of your mobile workforce.

Aug 11, Sept 8

MyAssistant

is an easy-to-use software tool that actively monitors your business and notifies you of the details that keep it running smoothly.

Aug 9, 23, Sept 6, 20

Office Connector

is an Excel Add-In that allows you to access your Timberline Office

data quickly and easily.
Aug 8, 15, 22, 29

On-Screen Takeoff

uses cutting edge technology to generate takeoffs directly from your PC screen.

Aug 25, Sept 22

Project Management

simplifies how you manage projects by providing quick access for costs, contracts and document information.

Aug 23, Sept 6, 20

Training: A Powerful Way to Make the Most of Your Sage Timberline Software

Crystal Reports

August 17 & 18

Estimating Fundamentals & Assemblies

Fundamentals: September 5-6

Assemblies: September 7

Project Management

September 8

2006 Sage Summit Dates Have Been Announced!

Sage Summit is an annual conference and trade show for all Sage Software customers. This year the conference will be held from November 5-8, 2006 in Nashville, Tennessee at the Gaylord Opryland. Mark your calendars and make sure to register early! For more information on Sage Summit, please go to www.sagesummit.com.

Sincerely,

The Accordant Team

