

# Accordant Bulletin

Welcome to the Accordant Bulletin for Sage Timberline Office users!

July 2008

Each month, our goal is to provide you with tips and tricks to make you an expert in Sage Timberline software. Accordant's consultants will teach you how to improve your productivity and knowledge of this powerful solution.

Here are Jeff's tips for this month:

## Handling Fuel Surcharges: Service Management

Our economy is directly impacted by escalating fuel prices. Service companies are searching for ways to pass on the increased fuel price on agreement renewals. So, how do we use Service Management to address this issue? This article assumes that the client is configured to use the service agreement functionality within Service Management. Since this may have an impact to existing work flow and/or setup, we will explore some of the options.

Service Management offers three service agreement billing options:

- Time of Service Billing
- Manual Billing of Service Agreements
- Automatic Billing of Service Agreements

### 1. Time of Service Billing

\* Set up a labor rate sheet with a trip charge with a description called fuel surcharge.

Setup>>Rate Sheet>>New>>Agreement with Fuel Charge>>include markups or not>>next>>select Trip Charge added as separate item>>Put in a dollar amount>> and assign to a product.

- Setup an agreement type with pricing method of agreement pricing. Setup>>new>>Agreement type>>Assign Rate sheet from previous step to this agreement type



Our Consultant's Corner expert this month is **Jeff Pisetzner**.

Jeff has been consulting for Sage Timberline Office products since July 2000 with contractors, service companies, and real estate firms in the Tri-State area. He received a BS in Accounting from the State of New York University at Plattsburgh and studied Management Information Systems at the University of South Florida. Jeff has over ten years experience in both public and private accounting, with a concentration in the areas of construction and property management. He is a Senior Certified Consultant for Accordant and is certified in Construction Accounting and Real Estate Products. He has a special focus in Service Management, Property Management, and Crystal Report writing.

\* 2x click on service location>>select agreements tab>>New Agreement>. Select the Agreement type you setup in step 2>>>Next (General tab info not required)>>Enter start date, amount per billing, and select TIME OF SERVICE billing option.>>Next (Equipment Tab info required if using PMs to generate the work orders)

When a work order gets generated automatically through the generation of PM(s) or manually, it must be tagged to this agreement type entered on the location. When you open up the work order register to start the billing process, the work order information will pre-fill.

## 2. Manual Billing of Service Agreements

\* Setup an agreement type with pricing method of agreement pricing. Setup>>new>>Agreement type

\* 2x click on service location>>select agreements tab>>New Agreement>. Select the Agreement type you setup in step 2>>>Next (General tab info not required)>>Enter start date, amount per billing, and select PERIODIC BILLING OPTION>>Select day of month

\* Consider refining security to limit access to the daily processing

To invoice the service agreement 2x click on the service location>select the agreement tab>right click>>Create invoice>>Change the description (defaults to adjustment billing)>>NEXT>>You will be in the invoice register>> On the first line SELECT FORM>>Change the description to what you want to appear on the invoice>>and enter unit sale>>CLOSE>>ENTER

On the second line FORM>>Enter Fuel Service Charge for the description>>Select Product "Fuel Service Charge">>Select Exempt Status and Tax Group>>Enter Unit Sale>>OK>>NEXT>>Print/Preview.

## 3. Automatic Billing of Service Agreements

\* Set up an Equipment Class  
ie. CONTRACT (Setup>>Equipment Class>>Enter A Description)

\* Set up two Equipment Types and assign it to the class. The First type, setup Service Contract Price and the second type, setup Fuel Service Charge. (Setup>>Equipment Types>>Enter A Description>>Assign to Class>>Finish.

If you would like to reserve Jeff as your consultant, please contact Swati Raje, Director of Client Services, at 973-887-8900 x105.

### Learn more about Sage Timberline Office

Want to attend a classroom training session? Click on the link for a course outline, registration form or more info.

#### [Project Management](#)

August 14

#### [Crystal Reports](#)

August 6-7

#### [Estimating](#)

August 18-19

### Attend a Webex

Learn more about other powerful tools for Sage Timberline Office. Attend a free online demo!

#### [Document Management](#)

Thursday, July 24th  
10AM Eastern

**\*To Register: Email**

**[lsalvas@accordantco.com](mailto:lsalvas@accordantco.com)**

#### [MyAssistant](#)

August 20, September 17

#### [OnScreen Takeoff](#)

July 25, August 8

#### [Office Connector](#)

July 24, July 31

#### [TimberScan](#)

July 23, July 28

\* Assign these equipment types to the locations. 2x click on the service location>>select agreements tab>>New Equipment>>Select equipment type "Service Contract Price>Next>>Next>>Finished. Repeat to put in the Fuel Service Charge.

\* Change the pricing method.  
Setup>>Agreements>>Agreement Types>>Edit>>Pricing Method>>Select Equipment.

\* 2x click on service location>>select agreements tab>>select the agreement>>Right Click>>Select the period tab>>Select periodic billing>>select day of month for invoice date>>select equipment tab>>select the equipment and assign to the agreement>Enter a price for each equipment type.

Use the daily processing to generate invoices automatically by selecting the box "Generate invoices ready to be billed."

**Key Points to Consider:**

- 1) Check with your local tax authority regarding fuel service charges
- 2) Invoice description requirements for agreement billing
- 3) Custom Reports for analyzing agreements
- 4) Customize your invoice templates
- 5) Define General Ledger posting accounts as fuel income or reduction to expense

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- Philadelphia, PA
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**SAGE TIMBERLINE OFFICE**