

# NEWS

SAGE  
TIMBERLINE  
OFFICE  
NEWSLETTER

JUNE 2007

## Consultant's Corner



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 Timberline consultants will provide you with tips on how to get more bang for your buck!

Our Consultant's Corner expert this month is Jeff Pisetzner. Jeff has been consulting for Sage Timberline products since July 2000 for general contractors, special contractors, service companies, and real estate firms in Pennsylvania and the Tri-State area. He received



## School is in Session: Sage Software University for Construction and Real Estate

Sage Timberline Office clients will soon be able to find training classes at Sage Software University (fondly referred to as Sage U). A course catalog will help you locate training based on product, type (Anytime, Realtime or Classroom), subscription, or key word searches. Sage also plans to create learning tracks to define training recommendations focused on job role or certification. Automated registration will make it much easier for you to enroll and pay for classes online, and launch online courses from your "My University" profile.

Most of the other Sage products are already enrolled on Sage Software University. The Construction & Real Estate section has plans to offer Sage Timberline Office courses first, followed by Sage Master Builder. Sage plans to have the first Sage Timberline Office classes live in mid-June so keep watch for updates about the official go live date.

If you have any questions about Sage Software University, please contact Kathy Morris at 973-887-8900 x103 or email [KMorris@AccordantCo.com](mailto:KMorris@AccordantCo.com).

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. Presently, he is a Senior Certified Consultant for Accordant Company, LLC and is certified in Construction Accounting Products and Investment Management. He also has expertise in Service Management, Property Management, and Crystal Report writing.

The following are Jeff's tips for this month:

Why does Service Management matter?

When the Service Management module is launched, the first screen displays a list of locations (not including the daily processing prompt). Surprisingly, this is one of the main areas of Service Management that is often overlooked. Although the sample data is a great resource, let's take a closer look at your business. Let's assume the AR customer already exists. From the main lookup screen, one way to setup a new location is to select "NEW" when you are prompted to select the location type (AR customer or JC Job). Select an AR customer from the drop down menu. Notice some of the information will pre-fill based on what was entered on the AR customer record, such as name, alias, address, and phone. From the perspective of a service operations department, is this information complete? This is what we will explore. However, it is convenient to just accept the defaults and click next/next/next/finish and create a work order.

## What if You Could...

**...streamline your takeoff process by completing your measurements and calculations as you mark up your drawings, allowing you to generate faster, more accurate takeoffs?**

Have you ever wondered if there was a way you could simplify your takeoff process? Wouldn't it be nice to draw takeoffs right on your screen and have calculations and measurements done for you?

On-Screen Takeoff can do all of this while at the same time greatly reducing the chance of errors. If increased accuracy and speed, greater profits, and lower risk are important to you, On-Screen Takeoff is the software for you.

### **INCREASE ACCURACY:**

- View color-coded drawings to identify conditions and their quantities.
- Takeoff the typical area once, and by design, extend the quantities to all the appropriate individual areas with the typical areas feature.
- Complete your takeoff and make area assignments or phase adjustments after you are done without re-taking off the project.
- Save multiple hours of exhausting plan review with the overlay feature. When comparing two versions of a drawing, deleted items are in red and added items are in blue.

### **REDUCE RISK:**

- Eliminate manually summarizing takeoff. Benefit from conditions itemized by area and totaled automatically, with filtering capabilities.
- Open details, sections, and elevation with the secondary view, and see a floor plan simultaneously.
- Use the layers feature when completing a takeoff of multiple divisions of work to visibly turn conditions on or off the plan image while concentrating on certain scopes of work.
- Increase communication efficiency by copying and pasting plans with takeoff, notes and annotations to submit as an RFI.

### **BID MORE IN LESS TIME:**

- Eliminate an entire manual takeoff process. As you highlight marked images, precise quantities are automatically measured. "If it's colored, it's counted."

When a new location is created, the ability exists to go through a series of four tabs (General, WO Controls, Billing, and Marketing Lists) to assign defaults. On the general tab, you'll see a field called "Alias". The customer name pre-fills into this field. It is good business practice to get in the habit of editing this Alias field to keep it unique, especially for those customers who own multiple locations, for two reasons. First, the Alias is a searchable field in the main lookup, and secondly, the Alias appears on the tabs, making it easier to navigate between the tabs within Service Management.

Types are useful when you want to classify your customers/locations and take advantage of the marketing list capabilities within the system. Also, a default rate sheet can be assigned based on type of customer.

Address information also pre-fills from the customer. If the service location and billing address are the same, this point is moot. However, if it's not then you may be sending the technician to the wrong location. It is crucial to edit the address because the address appears on many of the stock reports and the D-Board. You're building service history regardless of who owns it.

The zip code field is a useful field for searching or sorting. The ability exists in SM where the system validates all or part of a zip code based on service area, assuming service areas are defined (there needs to be at least one). You can take advantage of filtering the 5 week schedule by Area [View/5 week schedule/Right Click/Settings/Area]. It's great for routing.

The phone/contact information can be edited as well. This information

- Instantly calculate up to three different quantities per condition, chosen from multiple formulas.
- Streamline project setup by creating typical takeoff conditions called styles. Combine styles into sets to quickly drop-in multiple conditions to your bid.
- Create an export link directly with your Microsoft Excel templates through On-Screen Takeoff.

If you're interested in learning more about On-Screen Takeoff, or any other Estimating solutions that Accordant offers, please contact Rob Nappa at 973-887-8900 x102.



## Sage Summit- Save the Date

Sage Summit was a smash hit for clients who attended in 2005 and 2006. Please join us in 2007! The Sage Summit Conference is the perfect opportunity for beginner, intermediate, and advanced educational sessions, along with face-to-face support and peer networking. There will also be a trade show and inspirational speakers that will address the latest issues and trends that are affecting your business environment. Please make sure to bookmark the website [www.sagesummit.com](http://www.sagesummit.com) for up-to-date information.

Save the Date  
Sage Summit  
November 3-6, 2007  
Chicago  
McCormick West Convention Center

appears on stock reports but also appears in the second section below the D-Board [D-Board/New/OK] when you select the E-Card. Being aware of this will save a step when looking up phone and contact information, without having to constantly go in and out of location properties.

Let's move to the Work Order Controls Tab. This is an area where defaults can be set, such as the Center, so you don't have to select it each time you create a work order, assuming rate sheets are defined (Setup/Service/Rate Sheets). The advantage to defining rate sheets is to expedite your billing process, especially if you bill the customer by radius, zone, or a preferred rate. The location is the second place in the hierarchy in which a rate is retrieved. For example, if a technician has a good relationship with a customer, you can set the default to Primary Service Rep (assuming the employees are setup), which is pulled in from payroll [Setup/Employees/Employee/New], thereby saving a step when assigning a work order.

The Billing Tab is the last tab option. Here, defaults can be set for grouping invoices for the location or the AR customer. The advantage to this setting is the ability to expedite your invoice process by defining your business rules. For example, you can set your invoices by how your customer wants to view it, or if you would like to reduce the number of invoices you send, you can group work orders together and send only one invoice. If you do charitable work for a specific location, you can set the default to non-billable. The advantage here is that your service history can still be tracked for a given location, therefore, reducing pricing errors.

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## Upcoming Training Classes

*For more information or to register for a training class, please click on a link below, call Kathy Morris at 973-887-8900 x103 or email [kmorris@accordantco.com](mailto:kmorris@accordantco.com). Accordant training classes are held in Parsippany, NJ at the New Horizons Computer Learning Center.*

### Construction Accounting

July 9-11

### Service Management

July 17-18

### Real Estate Accounting

July 24-26

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## Upcoming Webinars

*For more information or to register for a webinar, please click on a link below or call Kathy Morris at 973-887-8900 x103 or email [kmorris@accordantco.com](mailto:kmorris@accordantco.com).*

### Document Management

Organize all important documents and files for fast, easy storage, retrieval, and routing. Document Management helps you eliminate the inefficiencies of managing files and paperwork.

**June 19**

### Field2Base

Field2Base is a wireless field service and two way communication tool that allows you to dramatically increase the productivity of your mobile workforce. Field2Base's communication technology gives you the ability to manage your sales force, field service, construction, inspections, homebuilding, and engineering field processes, along with the capability to digitize and optimize information flow to and from the field and back office systems.

**July 13**

### Fixed Asset

Fixed Asset Management Solutions provide total command over the entire fixed asset life cycle- from acquisition to

After reading this article, you should now know why service management matters.

If you would like to schedule Jeff as your consultant, please contact Swati Raje at 973-887-8900 x105.

SAGE TIMBERLINE OFFICE



disposal. When your business involves heavy equipment, vehicles and property improvements, it only takes a few depreciation mistakes to overpay taxes and insurance by thousands. In many cases, these wasted dollars are simply due to improper or ineffective asset management.

**June 14, 20, 26**

#### **MyAssistant**

MyAssistant is an easy-to-use software tool that actively monitors your business and notifies you of the details that keep it running smoothly. Based on your business rules, MyAssistant improves your productivity by automatically screening your database and notifying you of items that are truly important or time sensitive.

**June 21**

#### **On-Screen Takeoff**

On-Screen Takeoff® uses cutting edge technology to generate takeoffs directly from your PC screen. Using common digital image file formats, such as .TIF, .CAL, and most CAD files, you can see your blue prints directly on your computer screen and use the mouse to quantify lengths, areas, volumes and counts.

**July 29**

#### **Project Management**

Project Management simplifies how you manage projects by providing quick and easy access for up-to-the-minute costs, contracts and document information. Through integration with accounting, estimating, and purchasing systems, you're able to issue and see all prime contracts, subcontracts, updated plans and drawings, change orders, purchase orders, meeting minutes, requests for information (RFIs), and other project-related documents.

**July 11**



**Authorized Partner**

*Select 2007*

Please feel free to contact us with any questions, concerns or comments at 800-363-1002 or [info@accordantco.com](mailto:info@accordantco.com).

Sincerely,

The Accordant Team

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