

NEWS



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

Our Consultant's Corner expert this month is Bob Lifset. The following are Bob's tips for this month:



Managing the Paper Trail: Document Management Delivers Success

Griffin Companies has been in the property management business since 1969. In the late 1980's the company made the decision to transition from residential to commercial property management. This change demanded a business management system designed for the commercial property management industry. Research quickly brought Griffin Companies to Sage Timberline Office. "It has been a highly effective tool in managing the growing business," says Sharon Moore, controller for Griffin Companies. Today Griffin Companies is one of the top property management companies in the Minneapolis area.

BURIED IN PAPER

Moore is very happy with the accounting features of Sage Timberline Office. However, efficiency was lacking in the management of the large quantities of documents produced outside the accounting system—legal and government documents ranging from leases and management contracts, to real estate tax statements and capital asset invoices. When she attended a customer conference last year, sponsored by her Sage Software Business Partner, she viewed a demonstration of the new Document Management module and immediately realized how valuable this tool could be to Griffin Companies.

Document Management is an electronic document

Your Timberline data folder with your production data has unique settings that differentiate it from the Timberline Sample Data. It is often helpful to create a set of test data that represents a copy of your real data. Using this test data, you might do the following: (a) test the results of a workflow task where you are uncertain of the results after posting (i.e., Adjust Receivables in Accounts Receivable), (b) test a change in the module settings to observe the results (i.e., changing the level of detail that posts in Payroll to Job Cost), or (c) creating and testing a custom field before introducing it in the real data.

To create a set of test data, do the following (this procedure assumes you are running Timberline Version 9.4.0):

- (1) Make sure that all users on your server are out of Timberline (copying requires exclusive use of all Timberline files),
- (2) On your PC, launch TS Main or Timberline Desktop and in the Open Data Folder window set the Timberline folder to your production data,
- (3) Go to Tools => File Tools,
- (4) At the Operation Selection menu, choose "Copy", then click Next,
- (5) In the Copy Operation window, click the Add Folder button,
- (6) In the Browse For Folder window, your production data folder should now be highlighted. Confirm this, and click OK.
- (7) To the right of the area labeled "Destination" in the lower part of the window, click the Browse button,
- (8) Browse to the folder one level above where your production data folder is located. For example, if your production data is ABC Corp and is located at "T:\Accounting\ABC Corp", browse to "T:\Accounting." Click OK.
- (9) The destination should now contain the path one level above your Timberline data. Add a "\ " followed by the new folder name for the test data. For example if the destination path showed

classification, storage, retrieval, and routing system that runs directly from within Sage Timberline Office. Any document can be captured from a computer or scanner, and the resulting images are stored in a highly compressed, secure format in the DocuVault® database. A powerful search engine allows users to retrieve files by document classification, user-defined keywords, or multiple keywords, with lightning-fast results.

Together with the accounting department manager and the general manager of the commercial property management division, Moore created a proposal for the purchase of Document Management, which they presented to the company's president, William Ostlund. The benefits of time savings and increased efficiency were so compelling that Ostlund immediately approved the purchase, and Griffin Companies became one of the early adopters of Document Management.

DOCUMENTED EFFICIENCY

A common occurrence at Griffin Companies is the need to retrieve and make copies of all the leases connected with a particular property. In the past it could take a member of the administrative staff up to several days of digging through filing cabinets, retrieving boxes of documents stored remotely, and tracking down leases in order to complete this task.

Soon after the implementation of Document Management, one of these situations arose. An important client wanted to refinance a high-rise building. While meeting on this topic with the client, the Griffin Companies executive stepped out of the conference room to request copies of the 45 leases associated with the property. The executive returned to the conference room and continued the meeting. A little later as he was setting the expectation with the client that it would take several days to pull all these leases together, Moore entered and presented them with a CD containing all the leases in the required format. "The jaws dropped on every single person in the room," she recalls. "I knew then that everyone understood the benefit of the Document Management system."

IMPROVED CUSTOMER SERVICE

Another common occurrence is for Griffin Companies' clients to query costs of maintenance and repairs on their buildings. "If an owner wants to know the reason for \$30,000 on a repair, we simply attach the Document

"T:\Accounting" it would now show "T:\Accounting\Test Data ABC Corp" (It is a good idea to name your test data folder beginning with "Test Data" to readily distinguish it from your real data.)

(10) In response to the question "The folder T:\Accounting\Test Data ABC Corp does not exist. Do you want to create the folder?" answer Yes.

(11) Click Next 3 times. The production data will now be copied to the Test Data folder.

(12) Go to File => Open Data Folder.

(13) Click on Specify Folders button.

(14) Click Browse button and browse to the new Test Data folder. Click OK 2 times. The new Test Data folder will now be on the Open Data Folder menu.

(15) From the Open Data Folder menu, highlight the Test Data folder in the Location column and click OK. Note that even though the Location column shows the test data, the Name in the first column is identical to the production data.

(16) To change the name, do the following: (a) Go to File => Data Folder Settings => General. Next to Company Name, rename the Test Data (i.e., Test Data ABC Corp), (b) Click OK. Now when you access the new data in the Open Data Folder screen, it is clearly labeled as test data.

If you would like to schedule Bob Lifset as your consultant, please contact Judy Yannotta at 973-887-8900 x100 or JYannotta@accordantco.com.

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 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.

Management invoice to an e-mail," Moore notes. Not only can Griffin Companies staff complete their work more quickly and efficiently, Griffin Companies clients receive better service with faster responses to their inquiries.

Wesley Johnson, general manager and senior vice president, comments, "It's easy to produce lease documents for lenders for refinancing. Another great benefit is the stability—enough research and input went into the development of the product that we haven't found a single glitch, even though we were one of the first to purchase it."

Another important aspect for Johnson is its ease of use, "Our staff has adopted it very readily, and we save an average of \$30 for every hour we used to spend on research. I think it's a wonderful system—I'm looking forward to the next release."

A TRUE BUSINESS SOLUTION

Griffin Companies originally started with two users of Document Management and has recently increased that to four. "A nice feature of Document Management is that you can add users as you need them, making it very affordable to get started," Moore reports. Moore estimates that Document Management saves Griffin Companies over 192 hours of effort each year; time administrators formerly spent researching leases and compiling documentation. These savings will only continue to increase as new releases of Document Management allow the company to further automate internal processing.

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 973-887-8900 x103 or email kmorris@accordantco.com. Accordant training classes are held in Parsippany, NJ at the New Horizons Computer Learning Center.

Accordant Company
110 South Jefferson Rd.
Whippany, NJ 07981

T. (800) 363-1002
D. (973) 887-8900
F. (973) 887-8901

Sales Team:
Bruce Dominick
Henry Lubas
Mike McCarthy
Rob Nappa
Bob Sandelands

Consultants:
Keith Andrews
Joe Callahan
Gordon Cheyne
Vivian Frazier
Dan Henegan
Anthony Madonna
Kevin McGarry
Bob Lifset
Bryce Obye
Jeff Pisetzner
Swati Rajee
Rich Whalen

Office Contacts:
Kathy Morris
Judy Yannotta

Email:
sales@accordantco.com

Website:
www.accordantco.com

SAGE TIMBERLINE OFFICE

SAGE MASTER BUILDER

Upcoming Webinars

Document Management

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

Feb. 13
March 14, 21

Field2Base

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

Feb. 9
March 9

Fixed Assets

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

Feb. 12

MasterBuilder

Sage Master Builder is a fully integrated construction management solution that helps you gain better control of your construction company. Sage Master Builder will help you win more-profitable bids, finish jobs faster, collect money quicker and grow your company's revenues and profitability.

Feb. 16

MyAssistant

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

Feb. 13, 21
March 1, 7

Office Connector

is an Excel Add-In that allows you to access your Timberline Office data quickly and easily.

Feb. 13, 20, 27

On-Screen Takeoff

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

Feb. 23



Project Management

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

Feb. 21

March 7

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

Crystal Reports

February 12-13

Construction Accounting

March 5-7

Service Management

March 13-14

Real Estate Accounting

March 26-28

Sage Timberline Office- MyAssistant

As your business grows, it grows more complex - multiple projects with multiple tasks that need the involvement of multiple people. MyAssistant for Sage Timberline Office provides an easy way to be more proactive, improve communications and manage those things critical to a growing business. Completely integrated with Sage Timberline Office, MyAssistant allows you to:

- Define business conditions you would like to monitor, when each should be checked, and the action to take when issues arise
- Use Microsoft Outlook to notify you of issues needing attention
- Automatically send notifications to the right people depending on the type of event or task
- Have a central location to see unresolved issues for the different areas of your business.
- Define what will be checked in your Sage Timberline Office database, using any of the 200+ conditions provided with MyAssistant or by creating your own.

A MyAssistant expert will provide you with a live

demonstration and the opportunity to ask questions about how this solution will benefit you.

Please join us for MyAssistant Webex training:

http://www.accordantco.com/upcoming_events.shtml.
Click on the "MyAssistant" link.



Please feel free to contact us with any questions, concerns or comments at 800-363-1002 or info@accordantco.com.

Sincerely,

The Accordant Team

Sent to:
[[ReplaceSendEmailTo]]
If you prefer not to receive future e-mails of this type, [Leave this List](#).

Sent By:
Accordant Company, LLC
110 South Jefferson Road
Whippany NJ 07981
U.S.A.

powered by **Swiftpage** 

To view as a [web page](#).

[Forward to a Friend](#)