

NEWS

September
2006

Consultant's Corner



Photo: Joe Callahan, 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!

Our Consultant's Corner expert this month is Joe Callahan, Ph.D. Joe Callahan is certified in Timberline Estimating, has worked with Timberline since 1993, and has trained Timberline users for 7 years. In addition to consulting, Joe is one of Accordant's classroom trainers.

Tips this month from Joe:

Tips for one-time items

Since every project is never the same as the last, you will



Creating Harmony between People, Business, and Technology



Sage Timberline Office 9.4 Product News

9.4 FEATURES

The 9.4 release of Sage Timberline Office contains several new features and enhancements from your top requests. For example, you can scan, create, and complete Accounts Payable invoices through Document Management. You can print reports directly to Excel files. In Accounts Receivable, you can easily move cash receipts from one customer to another and learn about modifications to reports and formulas. Estimating introduces the new Database Builder Wizard tool for faster database setup. In addition, you can update a database from an estimate. In Project Management, you can set up specific sections unique to each job, and custom log enhancements include the ability to move columns and the availability of additional columns. In Service Management, performance has been improved, and you can now archive work orders. In addition, the 9.4 release includes the mass release of Setup Central, Job Central, and the Workflow Centers, which were first introduced in the 9.3 release.

DOCUMENT MANAGEMENT ACTIVATION CODES

When you install Document Management 9.4.0, you will need to type in your registration name and activation code. This is necessary for new

occasionally need to create one-time items to complete your estimating takeoff. Here are some time-saving tips when dealing with them:

- Using the keyboard shortcut [CTRL]+[1] will open the One-Time Item window. Together with the [Tab] key to move from one field to the next, you can quickly create one-time items without ever using the mouse.
- If you need to create a one-time item within a phase code already in your estimate, click any field on an item under that heading first. If you then proceed to create a one-time item, the phase code will automatically fill in based on the item you selected.
- If you need to create multiple one-time items under the same phase code, copy and paste the first one to make more. Then, simply change the description, quantity information and pricing as necessary.

Capture additional project data using custom job classifications

Did you know that you can store custom project data beyond that which the program gives you? You can define up to sixteen (16) user-

installations and for upgrades to existing installations. You can find your registration name by opening an Accounting and Management product and selecting **Help > About**. **This product is licensed to** section lists your registration name. You can find your Document Management activation code by logging on to www.sagetimberlineonline.com and selecting **My Profile > Profile > Applications**. If you prefer to use Timberline's automated Activation Line, you can call 800-848-4173. When calling, you need to enter the first five letters of your registration name and then follow the prompts.



Photo: Accounting Help>About screen.

NEW VERSION 9.4 REGISTRATION PROCESS

In the final window of the installation wizard you will have the option to register Sage Timberline Office products. Timberline will not collect personal information or use the product information for marketing purposes. We encourage you to select **Yes, I am willing to register Sage Timberline Office** so Timberline can provide you with the latest product news and benefits.

UPCOMING 2006 YEAR END

You must upgrade to 9.4 in order to install 2006 Year End updates. The 2006 Year End release will contain updates for version 9.4 only. We strongly encourage you to upgrade to 9.4 as soon as possible.

definable fields for each estimate you create in order to better capture relevant information about your project. Here are the basic steps to customize these fields:

1. Open up any estimate file that you have created.
2. Navigate to Takeoff > Estimate Information... > Job Classification tab.
3. Double-click on any of the descriptions and provide a new field name. From this point forward, new estimates will show the new field description.

Here are some useful applications:

- Utilize some of these fields to capture pertinent project information for displaying on custom estimate reports.
- If you reserve three (3) of these fields for "Estimate Number", "Estimate Status" and "Revision Number", this information can be linked to Estimating Explorer as both searchable and sortable information on all of your estimating projects.

Expand your item search options with custom sorting

Did you know that you can search for database items other than by Phase/Item?

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.

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.

Sept 8, Oct 13

MyAssistant

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

Sept 7, 20

Office Connector

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

Sept 12, 19, 26

On-Screen Takeoff

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

Sept 22

Project Management

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

Sept 6, 20

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

**Estimating Assemblies
Thursday, September 7**

You can develop your own sorting criteria (up to 4 at one time) to facilitate navigating through your database item list. Here are the basic steps:

1. Navigate to Database > Database Settings... > Item Sorting tab
2. Select your item sort number and (optional) description
3. Define your sort using the available elements (up to 4 levels deep)

Whenever you view an item list from now on, select from the drop-down labeled "Sort item list by" to navigate through your list differently. Here are some of the possibilities:

- Since project managers are often more familiar with cost codes instead of estimating phase codes, build a custom sort using "Job Cost Phase/Phase". This will help them locate database items for potential change order estimates
- Build a custom sort using "Material Class" to help locate database items based on their common purchase order classifications

Want to schedule Joe as your consultant? Contact Judy Yannotta at 800-363-1002 or email

JYannotta@accordantco.com.

Project Management
Friday, September 8

Accounting Construction
September 18-20

Accounting Real Estate
September 25-27

Accordant is expanding!!

On October 1, 2006 Accordant is moving. Our new office will be located at:

Accordant Company, LLC
110 South Jefferson Rd.
Whippany, NJ 07981
(ph) 800-363-1002

Please make sure to update your address book with our new company information.

October 1st, 2006

Accounting Applications Increase in Price

Effective October 1st, all accounting applications will be increasing in price. As a valued customer, you're receiving notice now so that you can avoid the price increase and save an additional percentage on all Sage Timberline Office applications. You can save up to 15% when you purchase between September 4th and September 27th.

So remember to order by October 1st, and you'll enjoy the maximum possible savings on current pricing, before the price increase takes effect.

CPA Technology Advisor Gives Sage Timberline Office 5 Star Review

The CPA Technology Advisor 2006 Construction Software review named 15 products that were "worth a second look". The majority of the products reviewed are suitable for a variety of construction and construction related businesses such as customer home builders, subcontractors, HVAC contractors, and Heavy Highway. Sage Timberline Office stacked up well against the competition! Here is the link to the publication: <http://www.cpatechnologyadvisor.com/article/article.jsp?id=1113>

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 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.

Starting October 1, 2006 our new address will be:

**110 South Jefferson Rd.
Whippany, NJ 07981
(800) 363-1002**

The Accordant Team:

- Bob Sandelands, *Managing Partner*
- Rob Nappa, *Director of Estimating*
- Bruce Dominick, *Manager- CT*
- Judy Yannotta, *Office Manager*
- Kathy Morris, *Marketing Coordinator*
- Plus our Consultant Team

Email: sales@accordantco.com

Website:

www.accordantco.com

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



Accordant Company, LLC

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