CPA Technology

FALL/WINTER 2010

Sage Timberline's Next Generation of Software

So, what's this "Sage Timberline Enterprise" that everyone keeps talking about? Get ready for Sage Software's newest CRE robust business management solution, just released the beginning of this October. Designed to meet the unique business needs for service and/or specialty contractors and general contractors who self-perform work, Sage Timberline Enterprise (STE) is developed with tighter integration between Service Management, Purchasing, Inventory, Estimating and Accounting for maximum productivity, greater visibility and reducing unnecessary data input. Sage's development roadmap for STE includes a second release (time TBD) developed more for the general contractor market.

Built on a high performance and secure Microsoft SQL platform, dispatchers can check inventory and order parts from their dispatch board. Project managers can see responses to RFIs, transmittals and submittals. Accounting staff can set up jobs simply by selecting from a list of estimates.

Some of the many other features include:

- Robust API functionality for heightened adaptability
- Industry-leading Estimating solutions helping to improve the estimating process for more accurate and profitable estimates and bids
- Intuitive and easy-to-use Workspaces that provide interactive inquiries
- Full integration between Purchasing, Inventory, Service Management, and accounting applications eliminating the need to enter information more than once
- An optional Service Management application centering around a new state-of-the-art Dispatch Board
- An open design providing integration with a variety of third-party applications (remote/mobile solutions, alert & notifications software, MICR check printing software and more!

Current Sage Timberline Office and Master Builder customers who decide to migrate to STE receive an "In The Family" discount. For a more in-depth look at this new solution from Sage, call CPA Technology at (610) 862-1998.

Are You REALLY Ready for Year-End?

It's not too early to start thinking about Year-End!

It seems as though summer has come and gone at the drop of a hat; year-end will be here before you know it. It is worthy to know that this year-end, Sage Timberline Office will support two versions (9.6 and 9.7) ONLY. If you are running on an earlier version, do your upgrades early to be well-prepared and ready for a smooth year-end. Call CPA Technology at (610) 862-1998 for any assistance!

More Enhancements to Come!

Keep your eye out on Sage Timberline Office's *9.7b* late summer release with new features and product enhancements.

Sage Timberline Office offers powerful new and enhanced features to more efficiently manage your business day in and day out. This latest update will make it easy for your team to locate, share and act upon key information. Now featuring added capabilities including:

- Tighter integration between work processes so it is easier to share and access important project and company related information as well as jumpstart new and change order estimates.
- Improved integration between Project Management and Document Management with the ability to send and archive Attachments* directly to Document Management's DocuVault.
- The flexibility to further automate the routing and management of documents with the newly enhanced Rules-based Routing feature in Document Management.
- Enhanced productivity with resized windows that allow you to find, view and, access the information you need faster than ever.
- The Document Management and Accounts Payable (AP) interface has been simplified.

  - Job Cost Import Estimate Improvements
  - ePlan Integrator – Tighter integration between Estimating and *OnCenter's* OnScreen Takeoff (OST) has been added.

For more information on this release, visit our website at *www.cpatechnology.net* to download the informational brochure. If you are on a current support plan and own Project Management and Document Management, you'll automatically receive these powerful new features. If you're not an owner of either module or are interested in additional uses, give us a call to take advantage of these newest enhancements!

TIP

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Efficiency Tip for Project Management:

Are your markup changes in approved change orders or change requests not being sent to Contracts?

Un-approve the change order, then make your changes. When it is approved again, Contracts will reflect the correct amounts.

... And More Enhancements Sage Master Builder *v16*

Sage Master Builder's most recent version provides you with the most asked-for enhancements, as well as newly expanded 1099 form generation and filing capabilities, and changes to accommodate the tax incentives provided by the HIRE Act of 2010.

Version 16 now gives you more of the integrated tools your team needs to work smarter, faster, and more cohesively than ever so you can more efficiently manage the complexities of running your construction business with:

- A simplified and more intuitive report writing wizard that lets you generate and customize reports in fewer steps.
- More efficient contact management that allows you to quickly manage, edit, and sort multiple contacts, even when dealing with contacts from the same company.
- New and improved Microsoft Excel integration that makes customizing spreadsheets easy and more accurate than ever because both values and formulas are automatically exported to Excel.
- More sophisticated report writing capability that lets you dig deeper into your data while allowing you to present it in more useful ways.

Sage Master Builder Version 16 includes comprehensive reporting, efiling, and payroll capabilities. Plus, it enables you to easily integrate estimating, production, scheduling, accounting, and analysis data in one convenient and easy-to-access location that takes your team's efficiency to an entirely new level. Download the information brochure on the "What's New" page *at www.cpatechnology.net* to learn more.

PRODUCT SPOTLIGHT

Office Connector:
View your reports in a whole new way

By now, many of you are familiar with the latest 9.7 version of Sage Timberline Office, including Office Connector Starter which is incorporated in the recent release. The Starter edition leverages the benefits of Excel, delivering a set of six powerful Excel-based workbook templates that you can use to query and interact seamlessly with your Timberline data.

To gain even more functionality, users can upgrade to a full version of Office Connector that includes 20 templates and the ability to purchase the Designer Tool for creating your own reports and templates. The Office Connector Suite automatically creates a connection to your database using Timberline Office's ODBC driver without the need to configure data sources or creating queries.

Office Connector - **Query** – Lets you create and run Excel-based reports. View Timberline Office the way you want to see it. Take advantage of Excel's graphing, formatting and flexible placement of workbook functions to visualize your information like never before.

Office Connector - **Write** – Lets you send your Excel data directly to Timberline Office. The Wizard makes it easy for you to create worksheet functions that can be used inside Excel formulas and the Approve Changes window puts you in total control of what gets written. Every time you write data to Sage Timberline Office, Office Connector generates a recap report to provide a complete summary of the results. The reports are automatically displayed to you and saved by date so you can quickly audit past updates**.**

Office Connector - **Import** – Lets you send you Excel data to text files that are automatically formatted to be imported into Timberline Office. Use this tool to create transaction and other records that can't be created directly via Office Connector Write or the Timberline ODBC driver.

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CONSULTANT'S CORNER

Using Office Connector Starter in Timberline 9.7

Q: Why doesn't my workbook or template open via Windows Explorer of Office Connector Launch Pad? Are you attempting to open an XLS or XLT file and it opens Excel but does NOT open the file that was selected?

A: Microsoft Excel contains a setting that prevents external applications from communicating with Excel via DDE. DDE stands for Dynamic Data Exchange and is used by some applications to exchange data back and forth. Windows Explorer uses DDE to open XLS and XLT files.

Therefore, if this feature is enabled, a workbook cannot be opened by double-clicking it in Windows Explorer. This would also disable the launching of workbooks via Event 1 Office Connector Launch Pad.

1. Start Microsoft Excel.
2. Select **Tools** > **Options**.
3. Click the **General** tab.
4. Clear the **Ignore other applications** checkbox.
5. Click **[OK]**.

And Even More Enhancements…. Sage MAS 90/200 v4.4

Sage MAS 90/200 has come out with a new version during the 1st quarter of this year, which provides new features and enhancements for workflow and business processes for all customers, with particular benefits in the inventory, purchase order, bill of materials and bar code areas of the system. Included in this release are features such as parallel migration from previous releases, the expansion of customer and item number fields, additional enhancements to reports and business intelligence capabilities, enhancements to purchase order, and usability improvements for batch entry and standard cost adjustments.

Two product updates for v4.4 have been released, with two more on the way, for on-plan customers delivering over twenty-five additional customer-requested features and functionality across the range of modules for MAS 90/200. Customers who are running on v4.3 and up benefit from Windows 7 compatibility and application virtualization (which allows you to allocate hardware resources among multiple virtual environments running on the same machine). For more information on these updates, visit us at *www.cpatechnology.net* or call and speak to our certified Sage MAS 90/200 consultant at (610) 862-1998.

Sage MAS 90/200 ERP

Need CPE credits? Keep an eye out for our CPE Seminar Series events taking place throughout the year. Information and registration can be found on the homepage of our website or on LinkedIn.

Our next Continuing Education event:
Tuesday, October 19, 2010: "Enhancing Your Business By Reducing Wasted Efficiencies"
Guest Speaker: Mr. Manfred Marotta, Former V.P. of Toll Brothers, Inc.

Get the most out of Timberline. Sign up for a Training Class today!

UPCOMING BREAKFAST MEETINGS (8—10 AM)

Thursday, October 21, 2010	**Thursday, November 18, 2010**	**Friday, December 10, 2010**
"Timesaving Tips & Tricks"	Q&A on All Timberline Modules	"It's Year-End Again!"

Too far to travel? You can now join us live, via the web as we host our monthly Timberline Breakfast Meetings. Log-in instructions will be emailed prior to the meeting upon registration.
For information on event registrations and our class listings, view our Event Calendar at www.cpatechnology.net.

We will work around your schedule to determine dates! Dates will be established once we attain enough interest for the listed classes. For more information or if you would like to register for any of these classes, call us at (610) 862-1998 or register online at **www.cpatechnology.net**. View our comprehensive class list on our online Events Calendar.   ** CPE Credits are available*

Financial Statement Designer & Inquiry Designer	Project Management Workflow
Beginning Report Designer	Project Management Document Control
Advanced Report Designer	Accounts Receivable & Contracts Setup
Year-End	Accounts Receivable & Contracts Workflow