

# CPA Technology

SPRING/SUMMER 2010

## Spring 2010 Releases

Sage Timberline Office 9.7 Enhancements—Coming Soon!

**IMPORTANT REMINDER! Media change from CD to DVD for Sage Timberline Office Accounting and Estimating products in 2010** Sage Timberline Office Version 9.7 will be distributed in DVD format only (except Residential Management, Document Management and some peripheral products still distributed on CD). Please call us at (610) 862-1998 to prepare yourself for any necessary changes when you are ready to upgrade.

**C**urrent economic conditions require running a construction business as efficiently and intelligently as possible critical for success. The more efficiently your business management system allows your team to locate and act upon key information, the faster and easier they can do their jobs. That's why we've enhanced Sage Timberline Office to provide everyone on your team with a wide range of automation, workflow and process improvements to make it easier to get more done in less time, including:

### **Simplified Installation**

Getting your team up and running on the latest software advances for Sage Timberline Office will be quicker and easier than ever; the process is easily administered from a central location saving you unnecessary legwork and the need to manually install on individual workstations.

### **Document Management Rules-based Routing**

Now you can ensure documents are reviewed by the right people in the right sequence every time, letting you automate the routing and approval processes that best suit your particular business needs.

### **Technology Updates**

Keeping current with the latest technology, Sage Timberline Office now supports Windows 7, Windows Server 2008 R2, and includes an upgraded Pervasive 10 database.

### **More Comprehensive Tax Filing Capabilities & Improved Payroll Management**

Now with over 250 additional US State and Federal government forms included, you'll be able to complete tax filings, new hire reports, and more.

### **BIM—Estimating Quantity Takeoff Integration**

With this release, estimators can now take full advantage of both 2D and 3D Building Information Models (BIM) when creating estimates.

### **Advanced Assembly Databases**

The latest versions include a significant increase in the number of items with the ability to price labor in three different ways: turn-key, man-hour, or labor-only unit price. Plus, assembly items are now organized by trade with over 60 trade specific labor costs supported.

### **Excel-based Reporting—Office Connector Starter for Sage**

Do you wish you had an easier way to analyze and report on data in a familiar format? Now you can leverage the benefits of Microsoft Excel to work with your Sage Timberline Office data using Office Connector Starter for Sage, included as part of your maintenance and service update.

Extract and perform analysis on a wide range of data through six workbook templates, including:

Sage Timberline Office Dashboard   Sage Timberline Office Search   Cost To Complete  
Account Ledger with Detail   Job List with Maps & Weather   Lease Expiration List

If you need assistance or need more information on any of the new releases, give CPA Technology a call at (610) 862-1998.

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Upcoming Trainings  
& Free Breakfast!



# MAS 90/200 v 4.4—New and Improved!

Included in Sage MAS 90/200 v4.4 are some of the most requested customer enhancements and usability improvements

From Core Financials and Project Management to Distribution and Manufacturing, Sage MAS 90/200 v4.4 is loaded with features. You'll be able to work even more efficiently the way you want to with additional features and enhancements focused on workflow and business process — especially in the inventory, purchase order, bill of materials and bar code areas of the system.



Highlights include:

- ◆ Upgrade more conveniently with significantly less downtime - Parallel Migration will allow you to continue operating your business on your existing Sage MAS 90/200 system while your new 4.4 system is getting prepared and tested
- ◆ Increase productivity and improve accuracy using more information in expanded Customer and Item Number fields to include unique information using 20 alphanumeric characters for Customer numbers and 30 for Item numbers
- ◆ Simplify the process of applying customizations to your system and reduce your overall costs with customization that survive future upgrades
- ◆ Dual grid streamlines your data entry throughout core Accounting, Distribution, and Bill of Materials
- ◆ Increase your productivity by accessing your data with fewer clicks
- ◆ Personalize your reports, views and other options throughout your system
- ◆ Access information easier using the new Business Desktop for the Sage MAS 90/200 Community site, training, support, and more
- ◆ Streamline your workflows to enable more efficient physical counts, display your system's expected quantities so only the variances require updating
- ◆ Increased your speed and accuracy of data collection using bar code enhancements
- ◆ Plus over 30 usability enhancements — and additional new features coming your way every few months to add value through the year!

## Sage Timberline Enterprise — Tomorrow's Construction Management Technology... Today

Are your business needs complex, yet you require a single-source solution that is easy to install, implement and maintain?

An industry leader with over 35 years in construction, Sage introduces their newest, innovative robust business management solution developed especially for **mid-sized contractors** needing a single-source solution to streamline complex processes through all departments of their business and increase productivity company-wide. Built upon a high-performance secure Microsoft SQL Server database, this solution offers full integration between accounting and operations, allowing you to maintain your company's most critical information in one, centralized location so you can keep a close eye on every facet of your business' performance with ease (Product will be released later this year).

Sage Timberline Enterprise will empower your team to be more productive because its superior integration and advanced construction and service-specific tools eliminate barriers that you never knew existed. Some of the many 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!)

For more information, call us at (610) 862-1998 or visit our website!

## CONSULTANT'S CORNER



### **Efficiency Tip: Find the Holes in your Estimates In a Flash with Sage Timberline Office Estimating**

If you're looking for a faster, easier way to search hundreds or even thousands of lines in your estimates to find the holes - we have the solution! Simply use the scan feature in Estimating to search for missing dollars in your estimates. Here's how to use it.

**To scan for missing numbers:**

- **Access the scan feature** with its icon, the menu option on the Pricing pull down, or press the F7 key.
- **Scan looks through the estimate** for places where there should be dollars or quantities and stops at each blank item.
- You can then enter a value and start scan again.

**If you have cells you have intentionally left blank and want scan to skip them,** enter either an asterisk (\*) or a dash (-) in the cell and scan will skip it. For example, you may want to skip a cell if an item had both material and sub, but the sub bid already includes material.

**Put the scan feature to work today and enjoy your extra free time and error-free estimates!**



# PRODUCT SPOTLIGHT

## JumpStart Wireless: Technology for the "Distributed Workforce"



You invested in great Sage management software. Unfortunately, your mobile employees lose an hour a day communicating essential information to and from your Sage software. Now you can end this waste of time and money with JumpStart Wireless technology. Eliminate paperwork, streamline time reporting, service orders, field (daily) reports, inventory tracking and asset management. JumpStart Wireless delivers breakthrough productivity for businesses with mobile staff, eliminating wasted travel time, constant interruptions, delays, and inaccurate paperwork that kill productivity and profits. Companies report a savings of up to an hour a day per staff member. You can be up and running in a few days with an affordable and easy-to-use system.

### How Does JumpStart work with Sage Timberline?



JumpStart Wireless delivers information from Sage Timberline Office to your field staff carrying cell phones or BlackBerrys. With those devices they can review service order numbers, cost codes, customer information, and other data extracted from Timberline. When you use Timberline to assign a service order to a staff member,

JumpStart Wireless grabs the data and sends it immediately to the right person in the field. As the work is completed on the job site, the field staffer enters results from that job. Finally, those field updates are then sent wirelessly back to the office and into Timberline where appropriate, as if your staff had done the entry manually. Field results are available automatically. No more guessing if the job is complete or if you made money. Bill your customers immediately after the work is completed.

**Features** • Connected and disconnected operation • GPS Location Tracking • Bar-coding, printing, and signature capture • Customizable by customers • Centralized management and configuration • Every form and task is secure and reliable

**Benefits** • Reduces operating costs • Increases productivity in the field and office • Eliminates faxes and extra trips to the office • Streamlines business processes • Minimizes training costs with wireless versions of existing processes and forms • Automatically and instantly delivers work orders, field reports, time sheets, and other job information to and from your Sage software.



## CPA Technology Is Getting a Makeover!

That is, our website. Look for the launch of our new and improved website at [www.cpatotechnology.net](http://www.cpatotechnology.net) coming later this Spring.

Our website has been a resource for many of our valued clients and visitors, providing key information about upcoming events, the latest product releases and industry resources. In keeping up with the growth of our company, our website is getting revitalized with our company branding remaining consistent.

Keeping the same quality of content, the information architecture and navigational structure will be reformatted for a more enhanced user experience and with more enhanced functionality.



We have created a **LinkedIn Timberline Users Group** which can be linked to from our homepage. This forum offers members a new way to share resources among fellow members. It's a space for users to share publications, reference materials, tips and tricks, and for you to share your experience and learn from others. Please consider joining our LinkedIn group if you have not already done so!



**Need CPE credits?** Keep an eye out for our CPE Seminar Series launching this June! Speakers will be experts in the field relative to the focused topic.

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

CPA

### UPCOMING BREAKFAST MEETINGS (8—10 AM)

**Wednesday, April 21, 2010**  
**“It’s Time for Timberline Spring Cleaning!”**

**Monday, May 24, 2010**  
**Timberline Report Designer Tips & Tricks**

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 later Breakfast Meeting dates, view our Event Calendar at [www.cpatechnology.net](http://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](http://www.cpatechnology.net).

View our comprehensive class list on our online Events Calendar.

*\* CPE Credits are available*

Financial Statement Designer & Inquiry Designer

Beginning Report Designer

Advanced Report Designer

Project Management Setup

Project Management Workflow

Project Management Document Control

Accounts Receivable & Contracts Setup

Accounts Receivable & Contracts Workflow