



Version 9.4 Enhancement Highlights

Sage Timberline Office

The following describes a number of significant enhancements included with the release of Sage Timberline Office, version 9.4. These new additions, as well as the many performance and work process related improvements, make Sage Timberline Office an even more compelling solution to your business management needs. Version 9.4 also includes all the new tools and enhancements to simplify implementation and lower the total cost of ownership (LTCO) which debuted in 9.3. For a demo of the "LTCO" features, refer to: <http://www.sagetimberlineoffice.com/pttdemo/request.aspx>.

For a complete list of improvements, existing customers can refer to the Release Notes document included with their software shipment.

Estimating

- Database Builder Wizard

The time-consuming task of setting up and building a database has been streamlined with a Database Builder Wizard. The Wizard walks you through the necessary steps of structuring and setting up your database more quickly and efficiently, saving you time and money and allowing you to take full advantage of the Estimating software much sooner.

- Update Database from Estimate

Finding time for necessary database maintenance and price updates is always a challenge. With this enhancement you can now selectively save your pricing information from your estimate to your database, significantly reducing your database maintenance efforts. The fields that you can update include **Item Description, Waste Factor, and Crew**. In addition, you can save other items changes to your database including **Price, Productivity or Conversion Factor, Apply Waste %, Taxable, Job Cost Phase, Job Cost Category, and WBS Code values**.

- Adding One-Time Items

The process for handling one-time items has been significantly improved. Creating one-time items is as simple as typing them directly in to the estimating spreadsheet, similar to using Microsoft Excel. And, we've also streamlined the ability to save one-time items to the database. Prior to updating you can review and determine whether you want to skip, add as well as change items before adding them to your database.

- Extended Field Sizes

In order to conform with industry standards and accommodate the newest version of CSI MasterFormat, the phase code field size has been expanded. Additionally, in response to customer requests, six other fields— item description, variable name, phase code, phase description, item code, and formula name—have been expanded, throughout the Estimating suite of applications.

- Increased Number of Categories

The number of categories available on a database item is now five, increased from the previous three. Customers now have a tremendous amount of added flexibility when it comes to pricing out "special" items. One example might be the need to price not only the cost associated with a particularly large piece of equipment but the setup or positioning costs as well as freight charges to get it there.

Property Management

- **CM Reconciliation Report**

Gain increased flexibility and control with reconciliation of your cash management account. This new report assists with bank account reconciliation and allows rollbacks to prior periods and partial periods.

- **Export to Microsoft Excel**

Benefit from the increased integration with Microsoft Excel for your reporting needs. All Sage Timberline Office-generated reports including Report Designer, Financial Statements, and Crystal Reports® can be sent to an Excel spreadsheet with the Print to file option. The columnar reports format allows for the most effective analysis layout.

- **Charges Next Period Used in Retroactive Charge Calculation**

The processing of recoverable expenses now includes the value in the **Charges Next Period** box in the calculation of the retroactive charge for the recoverable expense reconciliation.

- **End Date Cannot Be Set for Incorrect Period**

This enhancement provides increased protection for accounting period accuracy. If you set a period-end date on a property that is outside of the established General Ledger fiscal calendar date range, you will receive a message describing the scenario, with a note about how to bring the year-end date within the range.

Accounts Receivable

- **Move Cash Receipts From One Customer to Another**

Easily move cash receipts from one customer to another without having to unreconcile the deposit in Cash Management first. Changing the customer on a cash receipt will void all existing cash receipts for the deposit item and then creates a new customer cash receipt for the new customer, which can be applied to that customer's invoices.

Service Management

- **Move to History Option**

Take control of file maintenance. Easily move data to a history file using the new **Move Data Archive** wizard and ensure that you are seeing only pertinent work orders, invoices, and purchase orders.

- **DBoard Display Improvements**

- By removing the grey line between columns, DBoards with multiple columns are now much cleaner and easier to view.
- Create time stamps with custom time resulting in better work order control using the new **Create Timestamp** menu option.

General Ledger

- **New Options to Copy Chart of Accounts Feature**

Copy only the information you need while copying your chart of accounts using **Copy Chart of Accounts**. You now have the option to select and copy only accounts, or you can select and copy only account amounts (activity and balances).

Desktop

Working directly from your Sage Timberline Office Desktop, you can now access:

- Setup Wizards**—simplify your software setup and reduce overall implementation time.
- Workflow Centers**—integrate your business processes so they run faster and more accurately with intuitive, easy-to-use workflow layouts.
- Job Central**—easily set up common types of jobs and contracts in one convenient location.

Project Management

A number of improvements throughout the Project Management module will help improve efficiency with your daily tasks.

- **Job Specific Spec. Sections**
Added flexibility now allows users to set up unique, job specific spec. sections (formerly Setup-Spec Sections), offering the ability to choose from a “global” list of standard spec. sections or the option to create unique job specific codes.
- **Move Custom Log Columns**
Reorganize the columns in your custom logs so that they appear where you want them. You can also add a number of fields depending upon modules installed. If Job Cost is installed, you can add **Extra, Cost Code, Category, or Commitment** columns to your custom logs. If Equipment is installed, you can add an **Equipment** column.
- **Send Change Order Units to Unit Price Contracts**
You can send change order unit quantities from Project Management to Contracts. Units are entered on a change request in the **Quantity** column and are then added to a change order. When the change order is approved with the **Revise contract amounts** check box selected, the quantity amounts (units) are sent to the contract item and appear on the contract item’s **Contract Totals** tab providing more accurate information for analysis and reporting.
- **Mobile Number Added to Job Contact List**
Now you’re able to view a contact’s mobile phone number from the job contact list. Due to this improved integration, the number prefills from the Address Book as soon as you add the contact to the job providing instant access to the information without launching separate applications.

Document Management

- **Accounts Payable integration**
The concept of “one-time entry” of Accounts Payable data through Document Management (DM) as well as improved integration has been addressed in this release. Now, from within DM, you can classify and create AP pending invoices as well as associate a scanned invoice with an AP invoice through the use of a new AP Invoice document type. The new “AP Invoice” document type also enhances query and retrieval capabilities. Synchronization between these two modules results in time savings, reduction of duplicate data entry and streamlined work processes.
- **Identify Pages per Batch and Send Multiple Batches to Inbox**
When you scan documents or import files into Document Management, you can now automatically create batches using a preset number of pages per batch streamlining the entire process. For example, save time by grouping the one-page invoices from two-page invoices and then individually scan each group of invoices. Document Management will then create a new batch for each invoice from that scanned group of invoices based on the number of pages per batch setting. Then, you can send multiple batches simultaneously to an inbox vs. one e-mail per batch eliminating unnecessary clutter in your e-mail inbox.
- **Delete Documents from DocuVault and Document Logging**
Improved flexibility and DocuVault maintenance capabilities now allow you to permanently delete documents from the DocuVault with the exception of an AP Invoice document type. Additionally, Document Management now creates a log containing the details of any document that was deleted from the DocuVault.