Anytime Learning | Real Estate Session List

Anytime Learning sessions offer the ideal refresher training. Created to provide a convenient review of application processes, presentations are well suited to acquaint new-hires, cross-train employees, and revisit skills that haven't been used in awhile.

Sessions are recordings of instructor-led presentations and their lengths run from 5 to 20 minutes. Convenient controls allow you to play, fast forward, or go back at will. Also:

- View presentations as many times as you like.
- Encourage all interested departments to access the sessions—your subscription is for the entire company.
- Choose sessions in the order that's most logical to you (although note any recommended prerequisites).

For more information about purchasing an Anytime Learning Subscription, contact your Sage Timberline Office business partner or call the Anytime Learning marketing department at 800-858-7095.

Concepts and Tools

Use Setup Central

If you are a new Sage Timberline Office customer, and your business partner or consultant has determined that Setup Central is a good match for your business, watch this session before you begin to use Setup Central. We'll show you how to access this popular tool, and how it can simplify and shorten your setup process. You will learn how to prepare to use Setup Central so that you can complete your software implementation with efficiency and ease.

Use Technical Support Knowledgebase

Ever wish you had a Sage Timberline Office customer support analyst sitting at your desk? Or maybe the whole support team? Wish granted. We have compiled the knowledge of our support team into a Technical Support Knowledgebase—and you can access it 24/7. Learn how to use this interactive, online tool to answer questions and resolve issues. This session will benefit anyone who uses Sage Timberline Office and wants ready answers when questions arise.

Use Help

Did you know that you can use the Help system to find out how to accomplish a task, fix a problem, define an industry concept, or learn about changes in a new release of the software? Anyone who uses Sage Timberline Office can benefit from learning how to get the most out of the Help system.

Understand Data Structure

Learn the basic concepts of data structure, file types, and posting transactions, with an emphasis on what you need to know to produce reports. This is a helpful introductory session designed for any real estate customer who performs general data entry or uses reports in Sage Timberline Office.

Use Reports and Inquiries

If information is power, how can you get "plugged in"? Find out how to print reports that display the critical information you need. Learn the basic concepts to produce reports and view inquiries, and discover how to control the information you see or print. This session is helpful to any real estate customer who uses Sage Timberline Office, and is most beneficial when viewed after the session Understand Data Structure.

Customize Your User Settings

Want to customize Sage Timberline Office to your specific preferences? Learn how to set up the fixed decimal feature, printer fonts, toolbar and status bar configurations, and the print-to-file option. This session is designed for anyone who uses Sage Timberline Office.

Manage Files

Learn how to use the file management tools in Sage Timberline Office to help you manage your data and keep it running in tip-top condition. This session provides step-by-step instructions on how to backup and restore data files, and how to upgrade files after you have installed a new software release. Learn how to archive old transactions, remove unused records, and compact your files. This session is designed for system administrators, accounting managers, and data entry staff who work with Sage Timberline Office data.

Address Book

The Sage Timberline Office Address Book is an integrated contact list that can be used by other Sage Timberline Office applications, including Project Management, Accounts Payable, and Estimating. Discover the benefits of using Address Book and gain a basic understanding of this effective tool. Learn how to set up the companies you work with, and the people that you communicate with into an integrated list of vendor contacts, customers, subcontractors, and other contacts. See how other applications access the appropriate list for each situation. This session is designed for anyone who uses Sage Timberline Office and references a list of company or individual contacts.

Desktop

Desktop Overview

What is the Sage Timberline Office Desktop? How can it simplify access to the tasks and information you need on a daily basis? Learn the components of Desktop and the tools available to help you customize Desktop. This session is helpful to anyone who wants to learn the benefits of using Desktop.

Use Desktop Tasks

How can you get the tasks, reports and websites that you frequently use into your Desktop? Learn how to create and organize My Tasks in Desktop. Review tools and tips that maximize your use of My Tasks. This session is designed as a follow-up to the Desktop Overview session, and is appropriate for anyone who uses Sage Timberline Office.

Navigate the Desktop Content Area

Do you need instant access to the current status of your projects, accounts, or properties? A Desktop Home Page can provide just that. Learn how to select a default Home Page and how to navigate within it. This session is designed as a follow-up to the Desktop Overview session, and is appropriate for anyone who uses Sage Timberline Office.

Property Management

Manage Leases: Start Lease

The central component that binds you and your tenant is the lease. Want to find out how to translate this document into the software so it helps you process rent rolls or assess late charges? How about tracking lease terminations and renewals? Learn how to set up your lease in the software to accommodate any unique lease agreement. Find out how to set up templates for similar leases in the future. All sessions in the Manage Leases series are designed for lease administrators.

Manage Leases: Activate Lease

How do you activate the lease you just set up? Learn the steps to turn a future lease into a current one. Find out what happens when you activate the lease, what dates to use during activation and how charges are created. All sessions in the Manage Leases series are designed for lease administrators.

Manage Leases: Change Lease

While reviewing a lease abstract, you realize the termination date was not set on a recurring concession. How you can modify this on the lease? Learn what you can and cannot change on your lease when you use Change Lease and what to do when a lease is renewed. All sessions in the Manage Leases series are designed for lease administrators.

Manage Leases: Amend Lease

You have a tenant who is transferring to another unit. What's the best way to handle this in the software? Learn steps to amend a lease by creating a revision to the original lease. Find out what happens with the Effective Now process. All sessions in the Manage Leases series are designed for lease administrators.

Manage Leases: Terminate Lease

How do you end a lease in Property Management? Find out how to initiate a lease termination, reconcile the account, and change the lease to a historical status to avoid creating additional charges against it. All sessions in the Manage Leases series are designed for lease administrators.

Generate Rent Roll

Do you know how easy it is to automate your rent roll process? Find out how the software determines which charges to create and how you can preview the charges to make sure your records are set up correctly. This session is intended for anyone who creates or supervises rent roll.

Post Entries

After you create charges or enter cash receipts, how do you make sure that tenant and lease balances are updated? How about your account balances in General Ledger? Find out how the data flows and how entries are created when you post entries in Property Management. This session is intended for anyone who is responsible for posting entries in Property Management.

Cash Receipts

Do your tenants ever prepay rent? Or have you ever received a payment that you don't know how to apply? Learn ways you can apply tenant payments, whether to open items, or as prepayments, deposits or open credits. You'll also find out what to do with deposits from miscellaneous income sources such as laundry facilities or vending machines. This session is intended for anyone who records cash receipts.

Miscellaneous Entries

Do you sometimes assess one-time charges for your tenants? How do you record them in Property Management? How can you create charge or credit adjustments or write off a charge as bad debt? Find out how all this can be done through Miscellaneous Entries. You'll learn what types of entries you can make and how they affect your General Ledger accounts. This session is designed for anyone who performs or supervises data entry in Property Management.

Process Late Charges

Want to find out how Sage Timberline Office can help you assess late charges? Sit back and let the system do the calculations for you. You can preview late fees before you create the actual charges. This session is intended for anyone who is in charge of processing late fees.

Returned Checks

Do you ever have tenant checks returned from the bank for insufficient funds? Want to find out how you can reverse the payment and assess a returned check fee at the same time? Learn what options are available when you process returned checks and how they impact your bank account in Cash Management. This session is designed for anyone who handles cash receipts.

Error Correction: Payments

Made a mistake while entering a cash receipt? Paid the wrong open items or need to void a check? Find out how to use Change Entries to easily correct mistakes made on payments. Learn how to view, edit, reapply or void tenant payments as well as miscellaneous income receipts. This session is designed for anyone who performs or supervises data entry in Property Management.

Error Correction: Tenant Transactions

Want to find out how to change a tenant's charge? Learn how to use Change Entries to do just that. Find out how to use filters to find a particular charge and how to change or void a charge. This session is designed for anyone who performs or supervises data entry in Property Management.

Close Current Period

Do you know how to prepare Property Management for a new billing period? What other monthly maintenance tasks should you perform? Find out what happens when you advance the period end date on each of your properties. You will also learn how to archive transactions to maximize efficiency during processing or report printing. This session is designed for anyone who is responsible for end-of-month procedures in Property Management.

Accounts Payable

Set Up Vendors

Want to make daily invoice entry and check printing more efficient? Learn how to set up vendor information such as terms, discounts, and default codes for invoices. Find out what settings to use so that 1099 amounts are automatically stored by fiscal entity. Learn how easy it is to enter and track insurance requirements on your vendors. This session is designed for anyone who sets up vendors in Accounts Payable.

Enter Invoices

Learn the essentials of invoice entry, as well as features that will enhance your workflow. Find out how to quickly code an invoice for distribution to General Ledger, how to put an invoice on hold, how to create an attachment for an invoice, and how to use the Chargeback feature to pass invoice costs to a tenant. Learn how useful the Enter Invoices journal can be. This session is designed for anyone who enters invoices.

Post Invoices

What are all your options when you post invoices? Learn how to post invoices during invoice entry or as a separate step. Review what happens to amounts and totals when you post. Find out how to read the Post Invoices report and why it's important. This session is designed for anyone who posts invoices in Accounts Payable.

Select Invoices to Pay

Want to streamline the invoice payment process? Learn how to select invoices for payment—automatically or manually—based on conditions, ranges, and selections that you set up in your system. Find out how simple it can be to pay invoices from a separate bank account for each property or fiscal entity. Learn how to hold back payment for a particular invoice or make a partial payment. Review the reports that confirm which invoices are selected for payment. This session is designed for anyone who pays invoices in Accounts Payable.

Print Checks

Sage Timberline Office makes check printing quick and easy. Learn how to print checks, how to limit the check run by Bank ID, select print settings and review check reports. Find out how to make last minute changes to your payment selection and how to issue an on-demand check. Learn which reports provide check information. Review which files and records are affected by Print Checks. This session is designed for anyone who prints checks in Accounts Payable, and is most beneficial when viewed after the session Select Invoices to Pay. Please note that information about reprinting checks is covered in the Accounts Payable Error Correction session.

Record Manual Checks or Print Quick Checks

Do you need to print an on-demand check? View this session to learn how you can print one or more quick checks from one easy task, whether the invoice is already in the system or not. Find out how to record handwritten checks for invoice payments so your cash and payables are up to date. This session is suitable for anyone who enters invoices and prints checks in Accounts Payable.

Error Correction

How can you correct the account coding on an invoice? What should you do if your checks don't print correctly? What if you used the wrong check date? How can you void a check and reissue it? This session provides answers to all of these questions. Anyone who enters invoices and prints checks will benefit from this session.

Track Sales and Use Taxes

Want to know how to set up Accounts Payable to keep track of taxes during invoice entry? Learn how to set up use taxes and sales taxes and how tax rates are retrieved. Find out how the invoice entry process automates tax and tax liability entries. Review the report that provides you with actual tax and tax liability amounts. If you record use tax or sales tax, this session will benefit you.

Cash Management

Set Up Bank Accounts

Do you know how to add new bank accounts in Sage Timberline Office? What if the account exists on a different system? Learn how easy it is to set up new bank accounts, enter balances and open transactions, and edit information for your bank accounts. Find out how to set up Cash Management to make intercompany entries. This session is essential for anyone who maintains bank account records in Cash Management.

Edit Register

Find out how to record new cash-related transactions in Cash Management and why it is necessary to do this before you reconcile an account. Learn how to navigate the Edit Register window and enter adjustments, withdrawals, deposits and voided checks. Find out how to post entries. This session is designed for anyone who enters data in Cash Management.

Reconcile

Want to know how to reconcile Cash Management bank accounts with your bank statement? Do you know what to do if you're missing a transaction or if the bank statement balance doesn't match your cash account balance? Learn how to clear entries, reconcile individual transactions, suspend the reconciliation, and correct ending balance errors. This session is designed for anyone who reconciles bank accounts in Cash Management.

Bank Transfers

Do you process bank transfers to fund your operating accounts? How is this movement of funds tracked in Cash Management? Find out how to set up Cash Management to simplify this process. This session is designed for anyone who maintains bank account records in Cash Management and records bank transfers.

General Ledger

Set Up Accounts

You just acquired a new property. How do you create prefixes and accounts for it in General Ledger? What if you need to create an account for several companies or properties? Learn how quickly and easily you can create new base accounts, copy accounts to multiple prefixes, and review your chart of accounts. This session is designed for anyone who is responsible for setting up and maintaining the chart of accounts. This includes accounting managers, controllers, or others that manage or perform tasks within General Ledger.

Record Entries

It's easy to record, organize, and track journal entries in General Ledger. Find out how you can use journals to help identify types of entries, which can be useful information during reconciliation. Learn how to record entries and use journals, and understand how General Ledger uses the accounting date to manage entries. The session is designed for anyone who performs or supervises data entry in General Ledger.

Post Entries

How do you update account balances in General Ledger? Can you post to future, current, and past periods? Do you know how to tell if transactions posted successfully? Learn how to post entries and review the Post Entries journal, and understand posting limitations and parameters. This session is designed foranyone who performs or supervises data entry in General Ledger.

Error Correction

How can you correct an error in General Ledger? Can you change the original entry, or do you need to create a separate adjusting entry? How do you make adjustments to a prior period? Learn the difference between Change Entries and Record Entries. Find out how to make adjusting entries to closed periods and adjustments to prior years. This session is designed for anyone who performs or supervises data entry in General Ledger.

General Ledger Reports

Reports are a powerful tool that can help you with reconciliation. Learn how to print basic General Ledger reports and financial statements. This session is designed for anyone who prints reconciliation reports, balance reports, and financial statements in General Ledger.

Close Current Period

What tasks should you complete before you close the month in General Ledger? Learn how to close the month and why it's a necessary step in every accounting period. Find out how to change the open and closed status of a posting period. This session is designed for anyone responsible for closing the month in General Ledger.

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