Sage Timberline Office

Project Management

Simplifying how you manage projects. Keep the right people well informed at all times by providing quick and easy access to up-to-the-minute costs, contracts and document information.

Centrally integrated data

Through integration with Accounting, Estimating, and Purchasing, you're able to issue and see all prime contracts, subcontracts, updated plans and drawings, change orders, purchase orders, meeting minutes, requests for information (RFIs), and other project-related documents. You can set up your job as early in a project as you wish, then renumber the job to fit company standards and release all information to accounting at a later date for review, approval, and use. And as new project information is entered in accounting or operations, all updates automatically appear in Project Management and all related accounting applications (security privileges permitting). With Sage Timberline Office, there's no need for duplicate data entry.

Real-time information for solid decisions

A centralized source of information is your assurance of having a complete and current picture of any project. For example, with the job overview inquiry or report you can instantly see the status of contracts, profit, billings, costs, cash, RFIs, and submittals all at once. There's no need to manually synchronize accounting and project management software. Sage Timberline Office makes it automatic. Project information is always current and there's no limit to what information can be shared—costs, budget revisions, change orders, forecasts, prime contracts, whatever you like.

Create, track and retrieve documents

Sage Timberline Office provides tools to create and track common project documents, such as RFIs, meeting minutes, submittals, and transmittals. Take a look at which RFIs haven't yet been responded to and understand the potential impact of outstanding requests on a project's cost and schedule. The central database also lets you easily query across logs or jobs to review the status of any document. You always know what tasks remain, assuring that nothing falls through the cracks.

With the correspondence log you can add Microsoft Outlook e-mail, as well as Microsoft Word and Excel documents to Project Management's centralized database on-the-fly. It makes for convenient and thorough logging of all correspondence between project participants and—because you have instant access to documentation stored in one place—an easy way to resolve issues or questions without skipping a beat.

Access to information

By using inquiries and reports you can delve into the details behind the numbers. If you're ever on the phone and need to know about the payment of an invoice, you can pull it up in a hurry to see exactly how and when it was paid. Plus, job cost reports can also contain unposted costs as well, so you know where you truly stand today.

BENEFITS

- Improved project communication between team members
- Eliminate duplicate efforts by sharing data between departments and work processes
- Get better control of the change management process

Take charge of change orders

Easily control the change management process by quickly identifying potential change orders, soliciting quotes, and pricing. You're able to record all the details—such as when quotes are due and from whom—using a familiar-looking pricing worksheet grid. Then, pending change requests and/or commitment change orders can be approved (security permitting) and passed on to accounting. The generation of commitment change orders is quick and easy as many fields are pre-filled from information in original commitments or change requests. And, best of all, project information is kept current and up-to-the-minute.

Easy to learn and easy to use

Project Management is designed to work the way you do. The software is straightforward and easy to learn because electronic documents mirror many of the paper documents you're probably using today.

Features and efficiencies

- Create, track and easily distribute documents, such as RFIs, submittals and transmittals using automated delivery methods; e-mail and fax documents directly from an entry screen.
- Control the change order process. Quickly identify potential change orders, solicit quotes, price out the changes, and issue pending and approved changes to accounting. Fully integrated, the commitment change process is streamlined as information is available and "pre-filled" from existing change requests and commitments.
- Manage cashflow and profitability by controlling change budgets, costs, and revenue.
- Issue prime contracts, subcontracts, purchase orders, potential change orders, and change orders, then release these items to accounting for review, approval, and use.
- Access subcontract and PO status, initial and revised totals, pending and approved changes, and amounts invoiced, retained and paid.
- Work with contracts, estimates, forecasts, change orders, and cost details.
- Set up jobs and enter contact information in one centralized location.
- Create a job directory with job-specific contact information and set up unlimited distribution lists.
- Set up job specific spec sections choosing from the "standard" list or create new ones. For new jobs, you can select which spec sections you want on the job or modify the list on existing jobs.
- Instantly log all project-related e-mail, Word and Excel documentation as you work with a single click, or add summary detail for easy sorting if desired.
- Document and coordinate the distribution of current drawings and sketches to all interested parties.
- Create meeting agendas and record meeting discussions, action items and persons responsible.
- Automatically roll forward outstanding items into the next meeting agenda.
- Access pre-designed reports and inquiries or design your own.
- Secure access to information or the ability to perform tasks by individual or by job.
- Customize drop-down lists and add custom fields to fit your business.

Integration

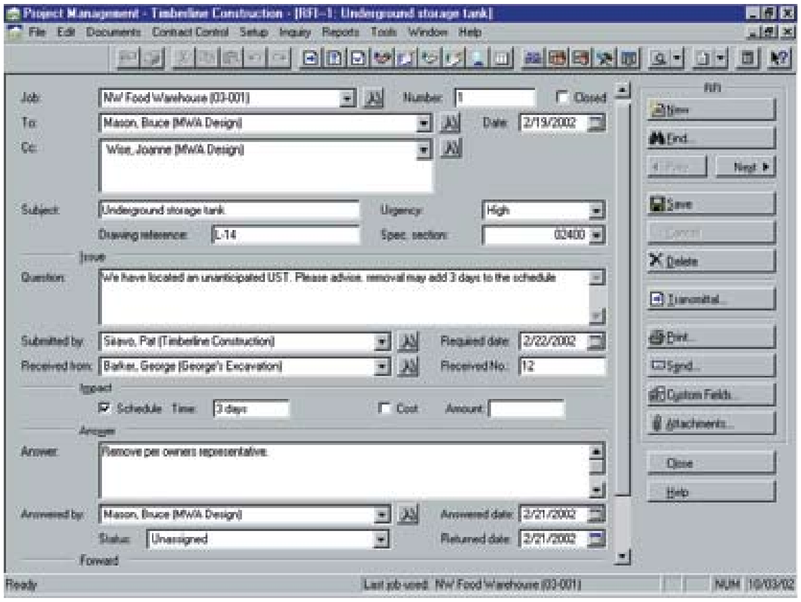
By storing all project information in one database, accounting and project management teams share the following information and tools:

- Job setup
- Budgets
- Prime contracts, subcontracts, and purchase orders
- Potential change orders
- Change orders
- Forecasts
- Labor and equipment cost details
- Percent complete and production quantities
- Reports and inquiries
- Prime contract, purchase order, and subcontractor change orders
- Accounts Payable invoices and checks
- Cost code lists
- Address Book with complete vendor and customer contact information
- System setup, including field descriptions, security, and more

Inquiry and reporting

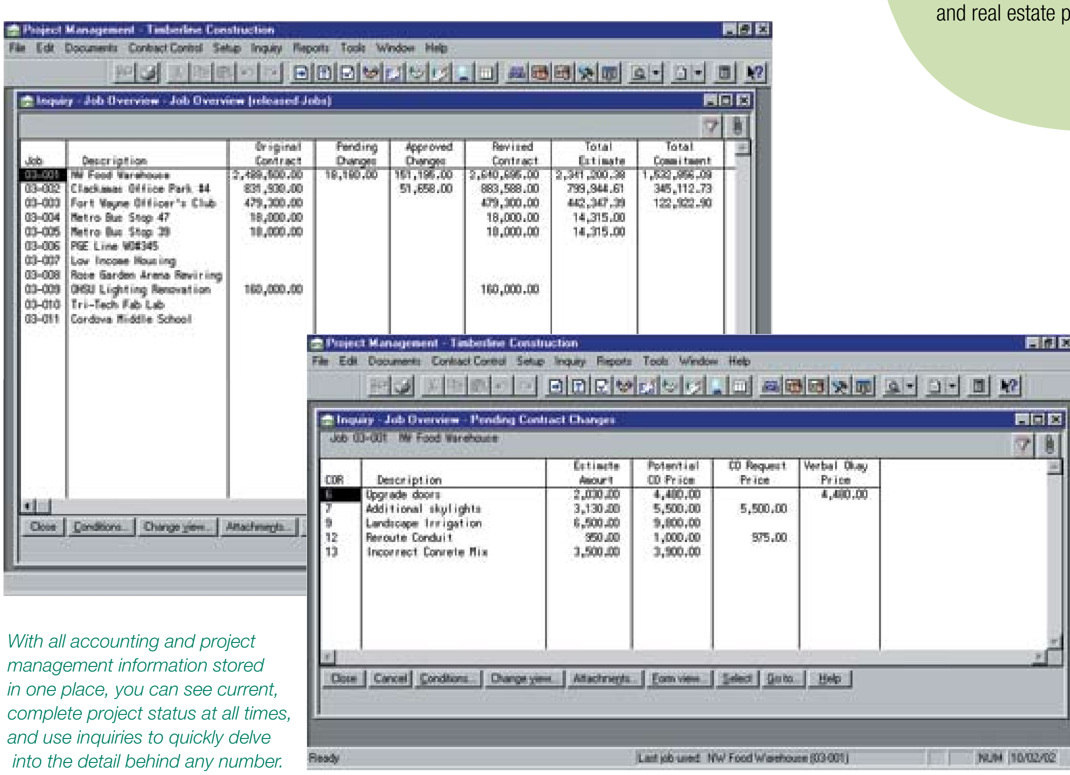
Below are just a few of the 100-plus standard reports and inquiries that come with Project Management:

- Job status overview combining accounting and project management detail on one report.
- Job cost by date range, monthly cost, and cost type analysis, including unposted costs.
- Contract status showing accounts receivable invoices and payments.
- Purchase orders and subcontracts showing accounts payable invoices and checks.
- RFI overdue and unanswered logs and summaries.
- Submittal logs by company, status, and summary report.
- Transmittal logs by date, company, and status.
- Insurance and lien documents.



All information needed to create an RFI is entered into one screen. Nothing complicated. Easy to train and learn

Project Management is a part of Sage Timberline Office, fully integrated financial and operations software for construction and real estate professionals.



With all accounting and project management information stored in one place, you can see current, complete project status at all times, and use inquiries to quickly delve into the detail behind any number.

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