

Using Sage Timberline Estimating with Workflow Management Suite

INTRODUCTION AND COURSE OVERVIEW

- I. Class objectives**
- II. Menus and toolbars**
- III. Help file overview and context sensitive help (F1 key)**
- IV. Three parts of Sage Timberline Estimating**
 - A. Spreadsheet
 - B. Database
 - C. Reports

FIRST STEPS IN SETTING UP TIMBERLINE ESTIMATING

- I. Edit options: Spreadsheet options and folders**
- II. General information**

SETTING UP AN ESTIMATE AND PERFORMING ASSEMBLY TAKEOFF

- I. Summary of steps for creating an estimate/budget**
- II. Get standard price agreements from subs and suppliers**
- III. Create the estimate**
 - A. Folder and estimate names
 - B. Estimate information/cover page Info
- IV. Spreadsheet and task bars**
- V. Assembly takeoff**

WORKING WITH THE SPREADSHEET AND TOTALS WINDOW

- I. Scan the spreadsheet**
- II. Collapse/expand the spreadsheet**
- III. Detail window**
- IV. Spreadsheet layouts and sort tabs in Standard Edition**
- V. Selecting add-ons and manipulating the results**

CREATING REPORTS AND PREPARING TO EXPORT THE BUDGET

- I. Spreadsheet report**
- II. Standard report**
- III. Bill of Materials quote sheet**
- IV. Job Cost interface: Send Budgets to Accounting**

PREPARING THE DATABASE

- I. Numbering schemes and sorting hierarchies**
 - A. Items
 - B. Assemblies
 - C. Subs and suppliers
 - D. Material classes
- II. Building items**
 - E. Item records and fields
 - a. Materials only
 - b. Default pricing and standard price agreements: lump sum vs unit pricing
 - c. Job Cost interface setup
 - F. Building phases
 - G. Class exercise: Building several items

BUILDING MATERIAL CLASSES: WHY MATERIALS ONLY?

- I. Material classes and how they are assigned**
- II. Class exercise: Build some material classes**
- III. Class exercise: Assign items to the material classes**

BUILDING ASSEMBLIES

- I. Looking at a “typical” WMS-compatible assembly**
- II. How to set up a factored assembly**
- III. How to set up an assembly with variables and if/thens for additions/deductions**
- IV. “Custom” takeoffs using assemblies and if/then formulas**
- V. Class exercise: Build an assembly and test it**

ADVANCED TOPICS—CUSTOM OPTIONS

- I. Performing item takeoff and one-time assembly takeoff**
 - A. What are items?
 - B. How to take off items
 - C. How to create one-time and database assemblies from item takeoff
- II. Performing one-time item takeoff**
 - A. What are one-time items?
 - B. One-item takeoff
 - C. Scanning and saving one-time items to the database.
- III. Database Editor**
- IV. Production Model Manager**
- V. Replicate database**
- VI. Cut length items**

WMS Purchasing Settings, Setup and General Workflow

INTRODUCTION AND COURSE OVERVIEW

- I. **Class objectives and format**
- II. **Student introduction, background information**
- III. **Desktop/Purchasing**
- IV. **Security Manager/Purchasing**
 - A. Groups
 - B. Privileges
 - C. Reports
 - D. Divisions

PRODUCT INTEGRATION REVIEW

- I. **Review handout of Workflow Management Suite products**
- II. **How Purchasing fits into the overall solution**
- III. **Information/data available in each product**

SETTINGS AND SETUP

- I. **General information**
- II. **Purchasing Settings**
 - A. Company Settings
 - B. Division Settings
 - a. Purchasing
 - b. PO Approval Options
 - c. Cost Management
 - d. PO E-mail Configuration
 - e. Purchasing E-mail Distribution
- III. **Settings that influence software behavior**
- IV. **Creating areas and phases for job-centric and phase release workflows**
- V. **Purchasing Activities and Master Purchasing Activity Hierarchy**

PURCHASING WORKFLOW

- I. **Basic workflow review**
- II. **Hands-on practice (lab)**
 - A. Jobs
 - B. Integration with Job Cost and Accounts Payable

- C. Create estimate for sample lot
- D. Budget management
 - a. Issuing budgets by estimate, option, cost code or release
 - b. Changing the budget
 - c. Refreshing costs and suppliers
- III. Purchase order management**
 - A. Printing POs
 - B. E-mailing notification to suppliers
 - C. Changing POs
 - D. Canceling or Deleting POs
 - E. Multi-Cancel/Delete Wizard
 - F. TBD Suppliers
- IV. Approving purchase orders for payment**
 - A. Reverse Approvals
 - B. Workers' compensation check-off
 - C. Approving by job, supplier or contract
- V. Entering Sales Prices**
- VI. Reviewing reports and inquiries in Job Cost to track the effects of each workflow step onto management reports**

Basic Phase Release Setup and Workflow

PHASE RELEASE SETUP REQUIREMENTS

- I. Division level settings: PO Options and job number formatting**
 - A. Combining activities
 - B. Allowing change order estimates
 - C. Cost Management, supplier number and pay points settings
 - D. Accounting Integration DB Settings
- II. Setting up pay points**
- III. Supplier Contracts screen**
- IV. Phase Releases screen**

PHASE RELEASE WORKFLOW

- I. **Issuing budgets and POs by cost code**
- II. **Approving POs by supplier or contract**
- III. **Sending to Sage Timberline**
 - A. Sending budgets by phase/cost code
 - B. Sending POs by supplier/contract
 - C. Sending invoices by supplier/contract date

WMS Purchasing Advanced Workflow

WORKFLOW EXCEPTIONS

- I. **Change orders**
 - A. Handling homebuyer changes (current procedure)
 - B. Designing a procedure to manage changes
- II. **Variance orders**
 - A. Variance order vs. field order
 - B. Workflow for managing variances
- III. **Managing supplier changes after construction start**
- IV. **Managing supplier cost changes after construction start**

COST MANAGEMENT TECHNIQUES

- I. **Cost update routine (whole house estimate import)**
 - A. Applying company or division level costs
 - B. Applying costs to selected areas
- II. **Supplier cost update routine using Estimating**
- III. **Supplier cost maintenance using Excel documents**
- IV. **Spot changes of supplier costs**
- V. **Master activity pricing**

PURCHASING REPORTS

- I. Customize purchase orders**
- II. Add reports to Purchasing**
- III. Review custom reports from Accounting**
- IV. Review reports in Estimating**

CRYSTAL REPORTS

- I. Standard BuilderMT Crystal Reports**
- II. Customized reports**

Sales Pricing

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- IV. Security Manager and Sales Pricing**
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PRODUCT INTEGRATION REVIEW

- I. Data received from Estimating**
- II. Data received from Purchasing**

SETTINGS AND SETUP

- I. Option categories**
- II. Option types**
- III. Plan types**
- IV. Cut-off phases**
- V. Security Manager**

