



# Please join us for Connect 2010, the annual United Solutions' Sage Timberline Office Client Conference

Thursday, September 16, 2010 from 8 a.m. to 5 p.m.  
at the Sheraton Framingham Hotel and Conference Center, Framingham, Massachusetts

Send completed registration form no later than 9/7/10 to: United Solutions, 28 Lord Road, Suite 285, Marlborough, MA 01752, email info@u-s-i.com or fax 508-485-3155. Questions? Call us toll free at 888-874-4874 ext. 1357.

Name  Company Name

Billing Address

City  State  Zip Code  Phone Number

Email   Vegetarian meal please.

Payment Amount  Current Date

Payment Method

Credit Card Number  CVV Code  Exp. Date

The cost to attend is \$145 per attendee before August 31 and \$165 thereafter. Deadline to register is September 7, 2010. An electronic confirmation will be sent after payment has been received and processed.

Authorized Signature: \_\_\_\_\_

## Schedule of Events (check only one track per session)

REGISTRATION AND CONTINENTAL BREAKFAST										
WELCOME ADDRESS by Greg Kirshe, Principal, United Solutions, Inc.										
	TRACK 1 Real Estate	TRACK 2 Estimating	TRACK 3 Tools	TRACK 4 Tools	TRACK 5 Tools	TRACK 6 Tools	TRACK 7 Tools	TRACK 8 **New**	TRACK 9 Productivity	TRACK 10 Productivity
<b>SESSION 1</b> 9:00 - 10:30 a.m.	<input type="checkbox"/> Financial Stmt Reporting	<input type="checkbox"/> Estimating Interface to 2-D and 3-D	<input type="checkbox"/> Field Reports	<input type="checkbox"/> ODBC Tips & Tricks	<input type="checkbox"/> Month End Reconciliation	<input type="checkbox"/> Intro to Crystal Rpts -Parts 1&2	<input type="checkbox"/> Sage CRM for Specialty Contractors	<input type="checkbox"/> Sage Timberline Enterprise	<input type="checkbox"/> MyAssis-tant	<input type="checkbox"/> Paperless Office
<b>SESSION 2</b> 10:45 - 12:15 p.m.	<input type="checkbox"/> Service Mgmt for Real Estate	<input type="checkbox"/> Estimating Futures	<input type="checkbox"/> PO and IV Reconciliation	<input type="checkbox"/> Job Central	<input type="checkbox"/> Data File Management	<input type="checkbox"/> Intro to Crystal Rpts (cont)	<input type="checkbox"/> Sage CRM for Real Estate	<input type="checkbox"/> Sage Timberline Enterprise	<input type="checkbox"/> Mobile Technologies	<input type="checkbox"/> Office Connector
LUNCH AND KEYNOTE ADDRESS, by Rob Johnson, Sage Software										
<b>SESSION 3</b> 2:00 - 3:30 p.m.	<input type="checkbox"/> Sage Futures & Roadmap	<input type="checkbox"/> Ask the Experts	<input type="checkbox"/> Mobile Technologies	<input type="checkbox"/> MyAssis-tant	<input type="checkbox"/> Paperless Office					
AFTERNOON RECEPTION AND RAFFLE										

## Session 1 9 to 10:30 a.m.

### RE

#### Financial Statement Reporting

**Lany Williams, United Solutions and David Diemer, Alliance Solutions Group**

Learn how to create what all property managers need to have – a budget versus actual financial statement report. Track spending to be sure you stay on budget with variance amounts and percentages. Don't let your expenses get out of control.

We'll also take a look at the new Monthly Comments Application from Alliance Solutions Group which is designed to allow for the explanation of General Ledger budget to actual variances. Your user defined Operating Statement allows for comments to be stored by month along with account specific 'permanent' check box.

*Level: Open to All Users*

### Est

#### Estimating Interface to 2-D and 3-D

**David Ayers, United Solutions and Aaron Jost, Sage Software**

BIM capabilities allow estimators to see and take off electronic plans in 2 and 3 dimensional formats with various programs such as OST, PlanSwift and QTO. This session will review each of these programs and show the interface and transfer of the data from takeoff into estimating. The interfaces to 2-D and 3-D takeoff systems have improved tremendously in the past couple of years and more improvements are coming. This session will review the various options available to estimators to take their 2-D and 3-D takeoffs to the next level.

*Level: Open to All*

### Tools

#### Field Reports

**Pam Daly, United Solutions and Kevin Hadley, Digital Business Integration**

Is your site manager filling out written daily logs to track daily activity details on the job site? Learn to use Field Reports to accurately and easily record information about the daily activity on the job site, special events, and conditions on the job, such as accidents, weather or visitors. Find out how to record employee hours in a Field Report, and send that information to Payroll. We'll show you how to enter and print an objective summary of the day's activities and conditions that occur on-site.

If you are using paper logs to record daily field information, you can get so much more out of them by keeping them online. hh2 Field Reports can help you collect and organize field information more efficiently, and then allow searching and reporting anytime, anywhere. Make your daily reports more than just a logbook sitting on a shelf...use them to better manage your projects.

*Level: Open to All*

### Tools

#### ODBC Tips & Tricks

**Mark Stevens, United Solutions**

ODBC is an interface between Timberline and any ODBC compliant software (i.e. Excel, Word, Access). This session will give some insight into what ODBC is and how you can utilize it. You'll learn how to set up the ODBC driver. You will also see examples of how ODBC can be used to import vendors or customers into Timberline, pull data from Microsoft Excel, do mail merges with Microsoft Word, and make global changes using Microsoft Access.

*Level: Open to All*

### Tools

#### Month End Reconciliation

**Norman Hartigan, United Solutions**

Do you dread month end reconciliation? Or maybe you do not reconcile until year end? In this session you will learn how to organize a month end routine and make it available in a Desktop group. The routine will follow a prescribed step by step workflow by application in order to minimize time spent on the reconciliation and maximize the likelihood your numbers will come together correctly the first time. Along the way we will look at potential issues causing subsidiary ledgers to not match the general ledger and helpful reports and tips to assist in finding out why.

*Level: Open to All*

### Tools

#### An Introduction to Crystal Reports – Parts 1 and 2

**Michael Kane, United Solutions**

This two-part session (not "hands-on") is intended for those who have no experience with Crystal Reports and want to start somewhere. It's also for those who have a little Crystal knowledge but still need to refine the basics. Feel like you're lost before you barely get started?

Using the STO core accounting modules, Part 1 will address configuring DSNs, setting Crystal reporting options, completing a report outline, determining record relationships, selecting and moving fields, building sort groups and creating totals. In Part 2, all of the concepts and principles discussed in Part 1 will be used as the instructor creates simple and effective reports which will be distributed to session attendees.

*Note: Attendee must register for Parts 1 and 2.*

*Level: Open to All*

## Tools

### Sage CRM for Specialty Contractors

**Graham MacLeod and Greg Kirshe, United Solutions**

Sage CRM is a web-based, front-office application that makes it easy for everyone on your team - estimators, sales staff and project managers - to manage communications with owners, contractors, subs and other parties. In addition, United Solutions has customized CRM to make it easy to generate and distribute quotes, and - once you've won the contract - to flag selected items for automated creation of new Job, Cost Code and Category records in Job Cost, Project records in Project Management, and Contract and Contract Item records in Contracts. Your accounting staff, freed from these repetitive and time-consuming data entry tasks, will be available for more high-value work, thus saving everyone time and money.

*Level: Open to All*

## \*\*New\*\*

### Sage Timberline Enterprise

**Shannon Ward, Sage Software**

Learn about Sage's newest innovative business management solution developed especially for service and specialty contractors who need more comprehensive functionality and unsurpassed integration so they can significantly streamline complex processes and increase productivity across their business. Sage Timberline Enterprise is built upon a high-performance Microsoft® SQL Server® database that allows 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's performance with ease.

*Level: Open to All*

## Productivity

### MyAssistant

**Linda Peterson, Cornerstone Solutions**

MyAssistant for Sage Timberline Office and Sage Timberline Enterprise monitors your business and automatically delivers information to the people who need it. For example, MyAssistant can proactively identify vendors with insurance expiring in 30 days and send them a letter, generate and distribute personalized reports, alert service managers of incomplete work orders, notify property managers of expiring leases, and deliver documents such as payroll direct deposit stubs. MyAssistant can take action for almost any scenario--use the prebuilt rules that come with the software or define your own using a simple Wizard. Timberline data can be included directly in email, and MyAssistant can attach any type of file to its emails. And after email is sent, MyAssistant helps manage the status of each notification. A personal assistant that monitors your business, MyAssistant improves productivity and extends the power of Sage Timberline Office and Sage Timberline Enterprise.

*Level: Open to All*

## Productivity

### Paperless Office

**Bernard Ross, Core Systems, Inc. and Brian Alles, United Solutions**

No matter what type of business you run, the cost associated with filing, storage, and retrieval of hard copy documents is staggering, not to mention, the cost in manpower and expense associated with sending hard copy invoices around to different managers for approvals. This session will focus on TimberScan and Document Management, two solutions that team up to give Sage Timberline Office clients the best automated invoice approval and document imaging solutions available in the market place today. We'll also address recent new features and enhancements of both products.

*Level: Open to All*

## Session 2

**10:45 to 12:15 p.m.**

## RE

### Service Management for Real Estate

**Mark Stevens, United Solutions**

Service Management is Timberline's work order module. This session will show you how to track service calls with your tenants. Easily track costs and be confident that your properties are well maintained, while keeping the most demanding tenants satisfied. Maintain information on appliances to track service history and warranty information. We'll review setup considerations if you have a separate service division in the company to determine where the receivable/revenue gets recorded.

*Level: Open to All*

## Est

### Estimating Futures

**Aaron Jost, Sage Software**

Hear about the future of estimating and the upcoming changes, upgrades, and improvements planned for Estimating. Major emphasis will be on the coming February 2011 release of Estimating version 10 which will introduce the long awaited SQL version of Estimating.

*Level: Open to All*

## Tools

### Purchasing and Inventory Reconciliation

**Pam Daly, United Solutions**

It's month end reconciliation time, what do you do with PO/IV? In this session learn how to include Purchasing and Inventory in your monthly closing process. We'll review the steps to reconcile Inventory to General Ledger and reconcile Purchasing to Job Cost.

*Level: Open to All Users*

## Tools

### Job Central

#### Norman Hartigan, United Solutions

It may not be right for everyone, but you can do more than just set up a new job through Desktop's Job Central. Make use of the "copy paste" function to set up your progress bill contracts more efficiently. You can quickly link the most appropriate cost codes and cost types to your new job and enter in the estimates for them without having to complete multiple setup screens. We will go over the pros and cons of this setup tool - it just may be right for you!

*Level: Open to All*

## Tools

### Data File Management

#### Bob Blizzard, United Solutions

Optimize your efficiency in retrieving, storing, and maintaining your Sage Timberline Office data. Learn where Timberline defaults are set and how to better organize your data. Also learn how to use Timberline's internal tools to back up, archive and compress data. Examples of current organized folders will be provided.

*Level: Open to All*

## Tools

### An Introduction to Crystal Reports – Part 2 of 2

#### Michael Kane, United Solutions

See description above. Attendee must register for both Parts 1 and 2.

*Level: Open to All*

## Tools

### Sage CRM for Real Estate

#### Graham MacLeod and Greg Kirshe, United Solutions

Sage CRM is a web-based, front-office application that captures all sales and service communications with current and prospective tenants, contractors, owners and property managers. The Residential application has a Guest Card workflow that tracks all showings and a Tenant workflow that tracks renewals, lease breaks and move-outs. The Commercial application shares the Tenant workflow but adds a sophisticated sales model that allows leasing agents to quickly assemble multiple lease options for a prospective tenant, and then flag the winning lease proposal for insertion into Timberline Property Management. Both applications provide reports on availability, occupancy and exceptions tracking, as well as the ability to generate tenant statements and access open transactions – all from a web browser and requiring no additional Timberline licensing.

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## Productivity

### Mobile Technologies

#### Kevin Hadley, Digital Business Integration and Rick Galyean, FieldConnect, Inc.

Streamlining the process of getting information from the field to the home office has become even more critical during these challenging economic times. During this session you will see how hh2's newest module (hh2 Field Service) integrates with Sage Timberline Enterprise and how your service technicians can view and manage their work orders, trips, activities, etc. using the iPhone, iPad and the web. You will also see how you can better manage your employees with hh2 Human Resources as well as how your employees can send in their time remotely using hh2 Remote Payroll.

FieldConnect, Inc. develops and markets wireless technician, web portal, and GPS software solutions to extend the functionality of Sage Timberline Office and Sage Timberline Enterprise to field technicians, dispatchers, tenants, and customers. FieldAccess allows the field technician to accept, update, and close work orders wirelessly in real time. FieldDirect allows tenants and customers to open work orders and track the status over the Internet. FieldLocator uses GPS to help companies manage and dispatch their fleet. FieldConnect's applications are designed specifically for organizations requiring a more complete way to easily and efficiently communicate with field technicians, tenants, and customers.

*Level: Open to All*

## Productivity

### Office Connector

#### James Coyle, Event 1 Software, Inc.

In this session you will learn about Office Connector, a powerful reporting add-in for Microsoft Excel that transforms business reporting as you know it. With it, Excel becomes an interactive reporting tool that connects directly to your company databases. Leveraging what you already know about Excel, we will show you how you can use your company data in combination with Excel's robust features and be liberated to do more business reporting than ever before. We will also demonstrate how the Office Connector Product Suite can transform your reports into intelligent, time saving tools for such purposes as GL Budgeting, Progress Reports, Time Sheets, and more. You will also receive an in depth view of Office Connector Starter for Sage Timberline Office 9.7, the exclusive version created for Sage by Event 1 Software.

*Level: Open to All*

## Session 3

2:00 to 3:30 p.m.

### Sage Futures and Roadmap

**Jim Walter, Sage Software**

Hear about future enhancements and direction of Sage from the vice president of development at Sage Software.

*Level: Open to All*

### Est Ask the Experts

**David Ayers, United Solutions and  
Aaron Jost, Sage Software**

David and Aaron will review recent questions and issues they have encountered and answer your Estimating questions. Come prepared and get your questions answered by the experts.

*Level: Open to All*

### Tools Mobile Technologies

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