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Newsletter for Sage Timberline Office

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Headline News

Join the Sage Timberline Office Community and stay up to date on the latest industry news and updates. You can interact with the Sage Construction and Real Estate team on Facebook and other social media. The site offers a series of free white papers filled with insightful and pragmatic information to help you work smarter and increase your company's bottom line. To access the Community website, [click here](#).



Sage Timberline Office Connector

A New Way To Access And Work With Sage Timberline Office Data Using Microsoft Excel

The new Sage Timberline Office Connector automatically connects your Sage Timberline Office data to Microsoft Excel, the analysis tool of choice for many accountants.

Get Started Quickly

You can save hours of time on reporting and analysis tasks with Sage Timberline Office Connector. It is easy to learn and use and comes with a number of prebuilt queries to get you up and running quickly. It consists of three tools, Query, Write, and Import. These innovative solutions can transform and expand your analysis and reporting options using a familiar set of tools.

Connector Query

With Sage Timberline Office Connector Query you can access your data quickly and easily within the familiar Excel format. The integration automatically creates a connection to your database using the Sage Timberline Office ODBC driver without the technical expertise needed for configuring data sources or creating queries. Once linked, you have the ability to:

- Access your Sage Timberline Office data from Excel.
- Use the Sage Timberline Office Connector toolbar buttons directly within Excel to navigate, build worksheets, and create reports.
- Embed dynamic queries that retrieve Sage Timberline Office data



automatically and place it into your Excel workbooks.

- Save reports and workbooks to send to other Excel users.

You can view your Sage Timberline Office data the way you want to see it—through a live connection to Microsoft Excel. Take advantage of Excel's graphic, formatting, and flexible placement of workbook functions to see your information in new ways.

Connector Write

Sage Timberline Office Connector Write allows you to map data from Excel worksheets to writable fields and records within Sage Timberline Office. Wizards make it easy to determine which fields can be created or modified. The Approve Changes window puts you in complete control of what

The Sage Timberline Office Connector

(continued from cover)

is written. This helpful technology makes it easy to manage and update data within Sage Timberline Office, such as vendor records, customer records, budgets, and pay rates.

Connector Import

Connector Import will quickly transform your Excel spreadsheets into a format that is compatible with various import functions in your Sage Timberline Office database. Create import files from spreadsheets with the click of a button—without the need to recreate or

reformat the information.

- Import Excel files into Sage Timberline Office without the need to modify or adapt the layout of your worksheets.
- Create a seamless import process with the click of a button.
- Avoid time loss of recreating properly formatted import files.

Secure Data Access

Using Sage Timberline Office Connector Administrator, you can decide which of

your Sage Timberline Office operator IDs should have access to Sage Timberline Office Connector Write. This easy-to-use tool was designed to complement and enhance your existing Sage Timberline Office security. If you have permission to write to your Sage Timberline Office database, you can ensure data integrity by approving specific write functions in the Approval Window.

Call us for more information about this useful new tool for Sage Timberline Office. ✨

Year-End Processing

In this article we cover some topics specific to the 2011 year-end procedures, and offer a few tips to help smooth your processing.

Supported Versions

Only Sage Timberline Office Versions 9.7 or 9.8 are supported for year-end processing. If you are running an older version, you will need to upgrade before performing your year-end processing. The 2011 year-end updates are cumulative and will include government and regulatory changes plus all enhancements and fixes from previous updates. If you are already on Versions 9.7 or 9.8, be sure to install the year-end update specific to your version before beginning year-end processing. To receive the year end software updates, you must be enrolled in a service support plan.

Training Options

Four complimentary *Anytime Learning* lessons provide guidelines, demonstrations, and tips to help you successfully complete these year-end tasks:

- Download the Year-End Update

- Download and Update Payroll Tax Rates
- File W-2 Forms
- File 1099 Forms

Step-by-step instructions are provided for both the traditional method of filing year-end forms and the new method using the Aatrix® Tax Forms and eFiling options. [Click here](#) to register.

Reconcile Accounts Receivable

Before closing the year, be sure to verify that the Accounts Receivable aging balances are correct and equal to the account balances in General Ledger. You can refer to Knowledgebase entry # KB228628 for detailed steps to verify and troubleshoot out-of-balance conditions.

Archive The Log Viewer

Beginning with Sage Timberline Office 9.7, you have the ability to archive your Log entries. Year end is a good time to perform this housekeeping task. Knowledgebase entry # KB231779 explains how.

Year-End Procedures Guide

The Year-End Procedures Guide provides step-by-step instructions for your year-end tasks. Each year, Sage adds helpful information based on the previous year's customer support calls. If you are on a current support plan, you should have received a printed copy of the 2011 Year-End Procedures Guide in November.

Automatic Information Updates

For one-stop year-end information, log on to the Sage Customer Portal and subscribe to Knowledgebase article # KB2011. When you subscribe to a Knowledgebase article, you automatically receive notification when it is updated. If you have any questions about year-end processing, please contact us. ✨