

Builder MT- Estimating and Workflow Management

Who: For large and medium-size homebuilders, provides highly customizable building process management that can stand alone or work in tandem with Sage Timberline Office accounting and estimating software. Day one, Estimating setup is for Estimators and Purchasing personnel. Day two and three, Workflow Management setup and workflow are for Estimators, Purchasing and Accounts Payable personnel.

Content: Three days of hands-on experience focusing on creating budgets, purchase orders and invoices using Builder MT Workflow Management.

Credit: CPAs successfully completing this course will receive a CPE certificate. CIS Consulting Group is a CPE sponsor with the North Carolina State Board of CPA Examiners, PO Box 12827, Raleigh NC 27605

Prerequisites: A familiarity with Microsoft® Windows®. A basic understanding of basic Estimating, Purchasing and/or Accounts Payable concepts.

Class Rates:

One Day: \$450 1st participant, \$400 each additional
Two Day: \$800 1st participant, \$700 each additional
Three Day: \$1095 1st participant, \$995 each additional

Registration:

Please fax completed registration form to 704-394-0052 or register online at www.cisinfo.com/classroom.htm for more information please call 704-393-0038 x1142

Course Outline

DAY ONE

Estimating

- Introduction and Course Overview
 - Three parts of Timberline's Estimating Software
 - What to Set Up First
- Setting Up an Estimate & Performing Assembly Takeoff
 - Summary of Steps for Creating an Estimate/Budget
 - Create the Estimate
 - The Spreadsheet, Task Bars
 - Assembly Takeoff
- Working with the Spreadsheet and Totals Window
 - Scan the Spreadsheet
 - Collapse/Expand the Spreadsheet
 - The Detail Window
 - Spreadsheet Layouts and Sort Tabs in Standard Edition
 - Selecting Add-ons and Manipulating the Results
- Creating Reports & Preparing to Export the Budget
 - Spreadsheet Report
 - Standard Report
 - Bill of Materials Quote Sheet
 - Job Cost Interface: Sending the Budget to Accounting
- Preparing the Database
 - Numbering Schemes and Sorting Hierarchies
 - Building Items
 - Building Material Classes: Why materials only?
 - Building Assemblies
- Advanced Topics
 - Item takeoff and One Time Assembly Takeoff
 - Performing One-Time Item Takeoff

DAY TWO and DAY THREE

Workflow Management

- Introduction and Course Overview
- Product Integration Review
 - Review Handout of Workflow Management Suite Products
 - How Each Product Fits into the Overall Solution
 - Information/Data Available in Each Product
- Setup and Settings
 - File Locations for WMS Applications, Estimating, and Accounting
 - Settings that Influence Software Behavior
 - Security Setup
 - Creating Community Areas/Zones
 - Purchase Order Defaults
- Workflow Start to Finish
- Advanced Workflow
 - Change Orders
 - Variance Orders
 - Managing Vendor Changes after Construction Start
 - Managing Vendor Price Changes after Construction Start
- Price Maintenance Techniques
 - Global Price Update Routine
 - Vendor Price Update Routine Using the Estimating
 - Spot Changes of Vendor Prices
- Reporting
 - Customize Purchase Order
 - Add Reports to the Purchasing, Scheduling, and Sales Pricing Applications
 - Review Custom Reports from Accounting
 - Review Reports in Estimating