

Sage Timberline Office



Workflow Management Suite

BuilderMT developed Workflow Management Suite for Sage Timberline Office to manage the day-to-day process of a builder and improve communications across the organization.

Since 1999, BuilderMT has associated itself with the top residential industry consultants while listening to its hundreds of clients about “Best Practices” and improved processes within a homebuilding company. These concepts, along with staff role-based processes, were the basis for developing the Workflow Management Suite. More than a desktop, the Workflow Management Suite offers the builder benefits not found in other builder systems in today’s market.

BuilderMT discovered that builders wanted an easy-to-use, graphical interface that allowed each person within their organization immediate access to information no matter if they are in the office, on a job site, or taking time away from the office. The Workflow Management Suite offers this level of improved communication amongst the various staff positions within your homebuilding company.

The Workflow Management Suite goes beyond the applications such as Purchasing, Scheduling, Wireless Scheduling, Sales Pricing, Sales Center Integration, and Warranty Integration, and the web-based Trade Portal by providing a tool that helps you interface with your staff, leading to increased efficiencies. BuilderMT also incorporated improved help, support, training, and automatic updates with the suite.

Security and Global Settings

- Privileged-based (staff roles and responsibilities) including control over global settings “Look but cannot touch.”
- Personal setting and global setting by staff or group.
- Personal settings to log in to mail server, change e-mail address, control look and feel of desktop.
- Customizable toolbars and buttons on the desktop.
- Customizable e-mail for subject or body of the e-mail for POs and schedule notifications.
- Wireless workflow setting by job number or address for display on remote devices.
- Event log viewer to pinpoint any errors and problems from a centralized log viewer. This helps identify problems and issues that come up during operating the software and will also log critical changes by users throughout the system for audit purposes.

On Demand Help and Training

- Click to Learn Tutorials: two- to five-minute audio and visual learning aids.
- Screen and menu based documentation.
- Access to BuilderMT’s 24/7 Support Center for:
 - Knowledgebase articles
 - Support ticket generation
 - Downloads of current documentation, manuals, software, etc.
 - Automatic downloads for clients on support and maintenance plans to receive auto updates of the software they own via the Web as soon as BuilderMT releases them.
 - Built-in client ftp access into the desktop. Logging also occurs here and validates against BuilderMT Support Center. Client can manage the whole upload download from here.

BENEFITS

- Improve communications across your organization with role-base processes and wireless access from the field
- Enjoy productivity gains with the easy-to-use graphical interface and customizable Desktop buttons and toolbars
- Real-time communication with trades and suppliers with the Web-based Trade Portal

All software applications in one location sharing a common database

- Based upon the roles you have given each of your staff, they can quickly switch from approving sales agreements to generating purchase orders/budgets to setting up schedules and approving purchase orders for payment, all from the same screen and the same interface.
- For those builders that only allow each staff person to perform one or more of these roles or tasks, they can establish security to only allow staff to have access to the data they are responsible for.

BuilderMT Central Processing Server

- Off loads processing to back end server technology which is transparent to the builder.
- Opens up options for faster deployment of remote computing devices and accessibility to web information.

Document attachments to the job

- Attach as many documents to the job as you need: scanned docs, cad drawings, documents, etc.
- Attach unlimited document types: floor plans, drawings, specs, etc.
- Assign document types to images and documents.
- Assign document types to purchase order activities and scheduling activities.
- Process vendor notifications via e-mail, and able to send all docs through the e-mail attachments.

Improved communications with Trades/Suppliers

- Web-based Trade Portal allows trades to view their schedule, POs, payments, and communications from the builder
- Uses multiple phone service providers.
- Includes up to three contacts per supplier.
- Allows flags as a purchase order contact vs. scheduling contact or both.
- Allows for sending same document or multiple documents to one or more contacts.
- Includes unlimited contacts for a future release.
- Uses instant messaging built into the application "Mobile text messaging to suppliers."
- Brings the supplier into the communication loop.
- Sends replies back to the original sender's e-mail depending upon the service provider.