



## Sage Timberline Office facilitates success for Control Group

The history of Control Group began in 1906, when the grandfather of the current Chairman and CEO, Edward Turen, and Executive Vice President, Neal Turen, started a window washing service. Today Control Group is one of the oldest, largest, and most respected, privately-owned providers of integrated facility support services nationwide. Its clients include commercial office buildings, shopping centers, schools, airports and more. Services offered range from repair and maintenance to security, engineering, janitorial, landscaping, construction, and call-center dispatch and support services.

### Time To Modernize

In 2005, Control Group began looking to replace its outdated DOS-based accounting system. The old software was a single-user system only used in the corporate offices in Secaucus, New Jersey. It was no match for the company's decentralized business model. After reviewing the software products available for project-based organizations, the company selected Sage Timberline Office as its new business management software. "Many factors came into play in our selection of Sage Timberline Office," recalls Allen Fredericks, chief information officer. "We needed a product that could handle the broad range of services we offer, and that we could deploy at our remote sites using Citrix application delivery technology."

With job costing, service, property, and project management capabilities all integrated into the core accounting system, Sage Timberline Office fit the bill. In addition, the management team at Control Group realized that the new Document Management module would help them increase efficiency while securing important corporate documents.

### Centralizing A Decentralized Model

Within each Control Group division, regional offices provide local customer support for the company's more than 15,000 customers. In some cases a location is synonymous with the customer site, such as a shopping mall. This decentralized business model allows the company to provide exceptional customer service to its clients, but until the arrival of Sage Timberline Office, there were significant challenges with access to information. Remote employees had no direct access to information such as outstanding receivables for their customer accounts. In addition, the corporate office often had trouble locating important legal documents stored at the remote locations.

### Customer:

#### Control Group

([www.controlsg.com](http://www.controlsg.com))

### Industry:

Facility Management Service

### Location:

Secaucus, New Jersey

**Number of Locations:** 22

**Number of Employees:** 800

### System:

#### Sage Timberline Office

- Accounts Payable
- Accounts Receivable
- Billing
- Cash Management
- Contracts
- Document Management
- General Ledger With Financial Statements
- Information Assistant
- Job Cost
- Payroll
- Project Management
- Service Management
- Service Agreements
- Service Purchasing

## CHALLENGE

Outdated single-user DOS accounting system was no match for a decentralized organization with 22 locations. Staff lacked access to critical information and business documents.

## SOLUTION

Access to Sage Timberline Office by Citrix remote access allows all locations to effectively manage their customer accounts. The Sage Timberline Office Document Management module gives secure and instant access to legal and other documents.

## RESULTS

Timely access to customer account information empowers remote employees to reduce total receivables. Document Management solution saves money on overnight shipping, courier, and insurance costs, as well as in claims settlements.

With Sage Timberline Office, remote offices now have direct access to the Accounts Payable and Accounts Receivable modules. Remote location managers can now enter their own purchase orders, resulting in faster and more accurate receipt of materials and supplies. “Our goal was for the remote offices to take ownership of customer receivables,” Fredericks reports. “Now that they can look up customer balances online, instead of requesting that a report to be printed and faxed.” Total receivables outstanding has already decreased, and the company expects to see this trend continue.

Karen Marx, director of financial controls, cites better, more timely reporting as an important benefit, and notes that staff members have quickly come up to speed and are very comfortable with the software. “Sage Timberline Office is helping us get organized,” says Marx.

### Improving Access To Information

With the core accounting system implemented, Marx turned her attention to Document Management. “In the past, many of our critical documents were not retained in a central location. Needless to say, it’s been a challenge keeping track of them,” says Marx. “Many of these documents, including Subcontractor Certificates of Insurance and Contracts are needed for audits, and to support insurance claims,” Marx explains.

Even when the documents are readily located, considerable time and expense is associated with transferring documents to the various locations in which they are needed, such as the corporate headquarters or insurance company office. In an organization of this size, insurance claims come in on a weekly basis. Documents are sent by courier or by overnight mail multiple times a day. The Document Management module is the ideal tool to make this process more efficient. “Document Management has been invaluable in helping us get organized, and soon these documents can be accessed instantly at any one of our sites across the country,” says Marx.

Using the Document Management module, any document created by computer or captured by scanner can be classified and archived into the DocuVault® database. Document images are stored in a

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– Karen Marx  
Director of Financial  
Controls

highly compressed, secure format. The powerful search engine quickly retrieves documents using the document classification, user-defined keywords, or multiple keywords.

Today the staff at Control Group is busy scanning historical documents into the archive. Marx looks forward to the day when every document—from leases and insurance policies, to customer contracts and even marketing materials—is securely stored in the database. With proper security, staff from anywhere in the country, can access, retrieve, and print documents instantaneously.

Control Group is realizing significant savings in several areas. Remote staff are more productive now that they have direct access to purchasing and customer accounts. An easily quantifiable benefit is the savings on overnight mail and courier services. Insurance premiums are expected to decrease, and Control Group should never again have to absorb the cost of a claim because of missing legal documents.

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