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# Sage Software, Inc. — Timberline Office for Property Management

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Sage Timberline Office for real estate is a high-end property management system, supporting all types of residential and commercial properties, including single- and multi-tenant dwellings, residential associations and more complex leasing arrangements. The system includes full accounting capabilities, and service management modules are available for a variety of specialties. The core suggested package of the Property Management version of Sage Timberline Office starts at about \$3,500 (for Property Management, AP, Cash Mgmt., GL, Financial Statement Designer, Address Book, and Sage Timberline Office Desktop) and can support virtually any number of properties or property groups, and any combination of property types.

Eire Kay Stewart is the Director of Finance for JP DiNapoli Companies Inc. ([www.dinco.com](http://www.dinco.com)), a family owned owner/developer of commercial property based in San Jose, California. Stewart says the company develops its own portfolio for long-term investment, although it has also purchased a number of properties as part of 1031 exchanges. “We have over 3,000,000 square feet of commercial property, including retail and institutional, but the core of the portfolio is R&D and manufacturing,” she says.

“We also operate a working cattle ranch, raising free-range all-natural beef for the restaurant industry, and we grow 5,500 tons of corn annually on 1,200 acres in the San Joaquin Delta region of California.” The majority of the company’s assets are in the San Francisco Bay area, but they also have commercial real estate in North Carolina and Colorado. The office staff numbers 10, and the agricultural staff is another 15.

Stewart says Sage Timberline Office is extremely flexible, and their decision to go with the product was based on two factors: the report writer and financial statement abilities and the fact that it offers both property management and job costing in the same product.

“We currently have 97 different entities and trusts on Sage Timberline Office in a single database, and we need to be able to do tax projections based on an individual partner’s interests in an assortment of partnerships. Sage Timberline Office allows us to do that. We use the same feature to compare similar properties or properties with the same tenant under lease,” she says. “We are able to use the Job Cost module to track development costs, tenant improvement construction, vehicle maintenance and agriculture costs including the number of acres planted, cost per acres to plant and yield per acre. We also track lease-up costs including the cost to deliver Plug-n-Play fully furnished spaces. We even track charitable grants for the family’s foundation in Job Cost. I find that pretty amazing, considering how different each of these tasks is.”

Stewart recommends that new or potential users get fully trained before installing. “Sage Timberline Office has a lot of features, but understanding how those features work and what you want/need to get from the system will determine how you set up various functions.” She also noted that the Technical Support Knowledgebase available online is a terrific resource and that they rarely need to go beyond the help offered there.

#### **INTERFACE/EASE-OF-USE – 4.5 Stars**

The Sage Timberline Office Desktop acts as the personal home page for each user. The customizable entry screen provides access to system functions via a Favorites menu on the left, with the majority of the screen offering a central location to view summary data and information vital to a particular user. This screen can show occupancy/vacancy levels, receivables

and payables aging, vendor invoices, late accounts or other options, along with graphical representations (charts and graphs) of the data. The Favorites toolbar can be populated with shortcuts to the applications the user needs most frequently, as well as to common reports and search parameters and outside applications including Word and Excel documents and Web sites.

Property and tenant information screens are well designed traditional form screens, with tabbed access to various information groups and utilizing pull-down selection lists for many entry options. Images, documents and other files can be attached to property or tenant files as needed.

### **MODULES/SCALABILITY – 5 Stars**

Sage Timberline Office's lease-based approach enables the tracking of any type of property, and its functions can be expanded through various specialty modules to accommodate virtually any property management situation. The system includes a full accounting suite, with GL, AP, AR, Cash Management, Job Cost, Payroll and a Financial Statement Designer, as well as reconciliation functions. Invoices can be set to run automatically or manually, and users can opt to make partial payments, create joint checks or manage retainage and lien waivers for tenant improvements. Optional property management modules include Advanced Retail, Residential Management and Expense Controller.

The Property Management module provides lease management and AR processing functions, with the ability to support multiple leases per unit and multiple tenants per lease, allowing unique lease clauses and calculations. It also helps track pending move-ins and move-outs, can calculate interest on deposits and issue 1099-INTs, and allows the creation of user-defined fields for tracking additional client information.

Available service modules include the core service management system, with the ability to track service histories and drill down to access additional information, as well as the ability to attach technician, property or unit notes to work orders. The system can automatically carry over unfinished work orders to the next day, and can bill multiple work orders on a single invoice. Other service modules include the @Road Integrator, Communications Center, Service Agreements/Preventive Maintenance, Service Inventory, Service Messaging and Service Purchasing.

## **INTEGRATION – 5 Stars**

All of Sage Timberline Office's modules offer total integration with the core system. The product suite's Residential Management module offers an interface with CLASSIC Real Estate Systems for tracking tax credits for affordable housing offerings. The interface minimizes redundant data entry, while enabling the user to track and initiate annual recertifications for all tenants. Sage Timberline Office also offers export capabilities with Word and Excel as well as accounting integration with select Sage Software products.

## **REPORTING – 5 Stars**

Sage Timberline Office's real-time reporting capabilities include more than 500 standard reports that are customizable using the system's report designer or with Crystal Reports. The program also enables users to run reports based on any query, showing specific data sets as desired by the user. Additional reporting tools include the Information Assistant (which allows viewing of online inquiries and reports without having to go through the accounting applications), the ODBC-compliant corporate contact database and the Address Book. Sage Timberline Office also offers forms, checks and other paper supplies through a third-party supplier.

## **SUPPORT – 4.5 Stars**

Sage Timberline Office is generally sold through resellers who also act as a consultant and help with the initial installation and setup of the system. Once going, however, the program is user-friendly and offers considerable built-in assistance features including right-click menus and content-specific Help. Online support resources are also available, including a Technical Support Knowledgebase. The company offers three subscription levels of support and a variety of training options.

## **SUMMARY**

Sage Timberline Office for real estate is a powerful application geared toward larger property management groups with multiple types of real estate holdings. The system is very flexible, supports any combination of properties, and provides exceptional reporting and metrics tools.

## **2006 Overall Rating – 5 Stars**

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