

Technical Tips
& Tricks

Year-End

Training

Product News

Tax Forms



Sage Timberline Office

Your Update! For Construction
and Real Estate**Make the Knowledgebase on the Sage Customer Portal your first stop this year-end**

The Knowledgebase is such a valuable store of year-end information for Sage Timberline Office that it should be your first stop when you have year-end questions. [Login](#) to access it today.

Check here for tips to your frequently asked questions

This week's tips include answers to frequently asked questions. Remember, to access the Knowledgebase articles listed below, you must be on a current support plan. [Click here](#) to log on to the Sage Customer Portal and search the knowledgebase for these year-end articles.

General

» Where can I download the year-end software update for 2009? [KB227780](#)

Payroll

» Are the Payroll tax changes in the year-end software update? [KB10435](#)

» When will I receive my taxes for the new year? [KB94487](#)

» When do I install the Payroll tax file update for the new year's tax changes? [KB4685](#)

» How do I update my payroll taxes if my workstations are not connected to the Internet? (USA) [KB103401](#)

» How do I enter automobile or health insurance allowances so that they appear as part of the W-2 form? [KB62146](#)

» How do I add a third-party sick pay and disability wages in Payroll? [KB13378](#)

Accounts Payable

» How do I verify my 1099 amount paid for a vendor? [KB59933](#)

» My 1099 totals are incorrect. [KB58336](#)

» How do I edit 1099 amounts for Accounts Payable vendors? [KB115958](#)

Click on the topic of most interest to you, or scroll down and read the entire article:

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[2009 Year-End Software Update](#)
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Year-End Tips[return to top](#)

Through early February, we will provide weekly articles that can help make your year-end close as smooth as possible. New and timely articles will be presented each Wednesday – watch for these in *Your Update! For Construction and Real Estate* e-mail.

Year-End Software and Service Plan Requirements[return to top](#)

To receive the year-end software updates, information, and support available for your Sage Timberline Office system, you must be on a service support plan. Please read the [Update Your Service Plan Subscription](#) section of this article for more information. You must also be using Sage Timberline Office Version 9.4.1 or greater to install the year-end updates.

Year-End To-Do List[return to top](#)

» Order year-end forms.
 » Contact certified consultant to schedule time.
 » Create e-mail folder and distribution list to store year-end tips e-mails.
 » Schedule year-end training for staff.

Year-End Timetable[return to top](#)

October—Contact your business partner to schedule time with your consultant for year-end processing help.

Early November—*Year-End Procedures Guide* available.

Mid-November—Weekly Year-End Tips e-mails begin.

Early December—Year-end downloadable updates available.

Late December—2010 payroll tax update available.

2009 Year-End Software Update[return to top](#)

All government mandated year-end changes in Accounts Payable, Payroll, or Property Management will be made to the following versions of Sage Timberline Office:

- 9.4.1
- 9.5.0 and 9.5.0 Rev 1
- 9.6.0 and 9.6.0 Rev 1

We are in the process of investigating government and other regulatory changes for the 2009 Year-End Release. We will communicate this information to you as year-end draws nearer. In the meantime, please read the following information to prepare for year-end.

If you currently use:

- 9.4.1, you can remain on 9.4.1 and install the 9.4.1 year-end update.
- 9.5.0 or 9.5.0 Rev 1 or any subsequent update to 9.5.0, you can remain on 9.5.0 and install the 9.5.0 year-end update.
- 9.6.0 or 9.6.0 Rev 1 or any subsequent update to 9.6.0, you can remain on 9.6.0 and install the 9.6.0 year-end update.
- 9.3 or earlier version of Sage Timberline Office and process year-end government reporting documents from Sage Timberline Office, we recommend that you upgrade to 9.6 before December. This will save you time at year-end. Contact your business partner for assistance with this upgrade.

After you finish your year-end processing, you can upgrade to the latest CD version. If you currently use 9.4.1 you can upgrade directly to 9.6 or to 9.7 when it is released in 2010.

The 2009 year-end release will be available for download as a software update. A notice will be sent in December when the 2009 year-end update is available. The 2010 payroll tax updates are a separate download and will be available in late December.

There are currently no federal changes in this year's year-end software update; however, we recommend you review the year-end software update notice to determine if any of the changes affect you. Download and install the year-end update if you are affected by any of the changes. If you have any questions about upgrading, please contact your Sage business partner.

2009 Year-End Procedures Guide[return to top](#)

The Year-End Procedures Guide provides step-by-step instructions about how to perform year-end tasks. In addition, it provides answers to commonly asked year-end questions, which can save you time during this busy time of year. In fact, we recommend that you check the Year-End Procedures Guide before you call customer support. Each year, we add helpful information based on the previous year's customer support calls. If you are on a current support plan, you will receive a printed copy of the 2009 Year-End Procedures Guide in November. Click the following link to open an electronic copy of the Guide.

[2009 Year-End Procedures Guide.pdf](#)

[2009 Year-End Guide - Canadian Supplement.pdf](#)

Visit the Knowledgebase on the Sage Customer Portal[return to top](#)

A Knowledgebase search is a quick and easy way to find answers to your questions without having to pick up the phone. Follow the steps below to access the Sage Timberline Office Knowledgebase and search for articles. The Knowledgebase in the Sage Customer Portal contains all of the same information from our previous Knowledgebase, however, the search engine works differently than before. Use the following resources to help you use the new Knowledgebase:

[Read](#) about quick tips

[Watch](#) a short video

Refer to the Help tab in the portal:

1. Browse to [www.sagecre.com](#)
2. On the right side of the window, in the **Support Logon** section, click **Sage customer website**.
Tip: Save this site as a favorite to make it easier to access in the future.
3. Enter your e-mail address and password, then click [**Log on**]
4. If you have forgotten your password or if you get a user authentication error when you try to log on:
 - a. Click the **Forgot your password?** link. Note: Do not click the **Need to Register?** link.
 - b. Click **Reset Password**.
 - c. Enter and confirm your e-mail address, then enter your last name and first name. Click [**Submit**]. A new password will be sent to you.
 - d. If you are unable to submit the form, contact Customer Support for assistance.
5. After logging on to the portal, click the **Knowledgebase Search** link.

Search the Knowledgebase for KB2009 to access a document that will be updated continuously through year-end with the most relevant and useful articles, documents, and other information. You can also subscribe to this page to receive e-mail notification of these updates.

Online Year-End Information[return to top](#)

If you have a subscription to any of our Sage Timberline Office service plans, you have access to the Sage Customer Portal – your online location for everything from software updates to online technical support. From the Year-End Information page on the portal, you'll be able to download the comprehensive 2009 Year-End Procedures Guide, sample Anytime Learning sessions for some common year-end tasks, read the articles from our weekly series of year-end tips, and download your year-end software updates. [Log on to the customer portal](#) and search the Knowledgebase for KB2009 for the latest year-end resources. You can also subscribe to the Year-End Information page so that you receive an e-mail notification each time we add new year-end information.

Update Your Service Plan Subscription[return to top](#)

In order to keep your business running smoothly and receive the year-end update as soon as it's released, it's critical to keep your service plan up-to-date. If you are unsure about the status of your service plan, please contact a Sage representative today at **800-858-7098** or [click here](#) and choose **Self Service > My Requests > Customer Service Request**.

With a Sage Timberline Office service plan, you'll receive the year-end tax table and form updates you need in order to meet government requirements. But that's just the beginning. You'll receive software updates on an ongoing basis as well as major software releases that provide enhanced features and functionality. And you'll have access to a wealth of information and technical support options to help you with year-end and with your support needs all year long. We have several service plan options available for you to choose from to meet your needs.

Anytime Learning Subscriptions for Year-End[return to top](#)**Complimentary Year-End Procedures Sample Subscription**

To help you with your year-end tasks, we are offering four complimentary Anytime Learning lessons, in which you'll learn how to:

- » Download the Year-End Update
- » Download and Update Taxes
- » Print W-2 Forms
- » Print 1099 Forms

Register for this complimentary sample subscription at [www.SageU.com](#). Registration is fast and simple, and gives you immediate access to these complimentary lessons.

Complete Year-End Procedures Subscription

The complete subscription for Year-End Procedures is available for \$190.00 (USD). The subscription will be updated for 2009 and ready to view by early December.

Appropriate for both Construction and Real Estate customers, this subscription includes 24 lessons that cover year-end tasks such as:

- » Preparing to print 1099s, 1098s, and W-2s
 - » Making adjustments to General Ledger
 - » Archiving data for historical purposes
 - » Performing close procedures in Accounts Payable, General Ledger, Payroll, Cash Management, and Property Management
- [Download the PDF for complete descriptions of these lessons](#). The following link will take you to the [Sage University Website](#) to register for this subscription. Registration is fast and simple, and gives anyone in your company access to these lessons for a full year.

[Register for the Complete Year-End Procedures Subscription](#)

Or, maybe you would prefer a blended approach with both in-person and recorded training? Check with your local Sage business partner to learn more about local classroom or onsite training options for year-end topics or call 877-724-3285 for more information.

Schedule Time with Your Consultant Now[return to top](#)

In order to meet customer release needs, certified consultants often schedule their time weeks in advance during a given release. If you rely on your certified consultant to help you with year-end processing, it's a good idea to contact your business partner now to book a time with your certified consultant. Year-end is coming—don't be caught unprepared at this important time!

Payroll and Year-End Forms[return to top](#)

Yes, it's time to start thinking about year-ended payroll processing and ordering 2009 tax forms! Sage CRE Forms has up-to-date, accurate Tax Forms that are guaranteed by Sage to be 100% compatible with your upcoming Year-End software release. Call a Customer Support specialist at Sage CRE Forms to discuss your requirements and options for W-2 formats.

Sage CRE Forms

Phone: **800-760-7929**

Fax: **503-454-1826**

E-mail: sales@sagecreforms.biz

Website: www.sagecreforms.biz

Additional Support[return to top](#)**Online Support Request**

If you would like assistance with a solution and your service plan provides online technical support:

Log on to <https://customers.sagenorthamerica.com/irj/portal/anonymous/login>.

Click **Self Service > My Requests > Customer Support Ticket**. This sends your request directly to Customer Support.

Phone Support

In the U.S. or Canada, call **800-551-8307**. Support hours are Monday through Friday from 6 a.m. to 5 p.m. PT (Pacific time).



800-858-7095

www.sagecre.comDOWNLOAD
Printer Friendly Article**Suggestions and Feedback**

We welcome your suggestions and feedback regarding *Your Sage Timberline Office Update! for Construction and Real Estate*. Please submit your comments, article ideas, compelling statistics, and success stories to vantagepoint.na@sage.com.

If you have a customer support question, please call 800-551-8307.

