

The Challenge

Pinnacle/CSG, Inc. is a full-service project management firm and technology consultant delivering first-rate, personalized service to clients throughout the Southeastern United States. Pinnacle/CSG is a start-to-finish source for all construction & technology needs offering a complete scope of services including consulting services, construction management at risk, construction management as agent, design-build, lump sum general contracting, and Building Information Modeling (BIM.) Utilizing cutting-edge software and cloud-based applications is just one of the reasons Pinnacle/CSG is an industry leader.

With a commitment to and heavy emphasis on maintaining a high level of customer satisfaction, Pinnacle/CSG continually seeks new ways to increase the efficiency of their internal processes. One of their winning company policies is that no invoice is paid unless reviewed

and approved by the Project Manager.

“As both our company’s size and the revenue per project continued to increase, we found that the number of vendors and suppliers required to complete each project successfully



Case Study

Award Winning Technology that Keeps Pinnacle/CSG On-top



also increased,” stated Jude Rosilien, VP of Construction Operations. He added, “This put strain on our existing, paper-free system and started leading to delayed approvals and payments.” Keeping the project management team and the project accounting team on the same page with timely invoice approval processing needed to be improved to maintain their high customer satisfaction levels.

The Solution

After determining that the existing invoice review and approval process was inefficient, Pinnacle/CSG’s business technology consultant suggested implementing TimberScan®, which connects directly to their Sage 300 Construction and Real Estate software (Sage 300 CRE.) Since TimberScan was developed especially for Sage 300 CRE, the automation features and paper-free nature of the solution was a perfect fit for Pinnacle/CSG.

Today, Pinnacle/CSG follows five simple steps to process invoices. First, they acquire the

invoice with TimberScan in one of three ways: automatic email extraction, called “Email Monitoring”; via a download, drag and drop method; or by importing scanned paper-invoices. Second, they code the invoice with the appropriate project manager via drop-down selection, a specific project name, and a cost code for the associated job. Third, the responsible party receives an automatic email notification that an outstanding invoice is ready to be reviewed. The reviewer/

approver has the option to check for errors in the coding, to re-route the invoice to the appropriate individual if it was coded incorrectly, send the invoice back to the initiator if the reviewer does not know to whom

they re-route the invoice, or approve/reject invoices with comments. On occasion, the Pinnacle/CSG approver will email the invoice directly from TimberScan to the supplier or vendor if needed. Fourth, upon final review, the invoice is routed back to the project accountant and is seamlessly sent to Sage 300 CRE Accounts Payable as a new invoice. Once the invoice status changes to Paid, the invoice amount is reflected in the

project budget code(s) selected during the coding process. If the project is rejected, the project accountant will conduct a courtesy check for errors and will reject the invoice in Sage 300 CRE. Finally, Pinnacle/CSG is able to view and report on approved invoices from TimberScan leveraging a variety of sorting and viewing options.

In addition to TimberScan and Sage 300 CRE, Pinnacle/CSG leverages Procore to manage their project life cycles. The connectivity between each system allows their project managers to gain easy access to all documents that are assigned to their specific projects for enhanced budget and cost management. Recently, Pinnacle/CSG won a Vision Award from ContstrucTech for the integrated use of technology in the construction industry.

“Having a speedier invoice approval process with increased visibility into project status’ has made our administrative side of the business much more efficient,” said Rosilien. The elimination of duplicate entry at invoice coding along with workflow automation has saved a lot of precious time that is now spent on interaction with customers. Pinnacle/CSG has also found the benefits of their innovative and streamlined technology processes to be nurturing a positive team atmosphere.



Construction and Real Estate
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