

Sage 300

Construction and Real Estate



MyAssistant

Your personal activity and business monitor.

The best way to keep an eye on your business and take action. Sage 300 Construction and Real Estate MyAssistant (formerly Sage Timberline Office) MyAssistant proactively monitors key performance indicators, providing instant alerts about issues needing attention and the information needed to take action. MyAssistant automatically generates reports, spreadsheets, documents, and email alerts—and distributes this critical information into the hands of those who need it, helping monitor and manage all phases of a project or property.

MyAssistant uses the Desktop, Windows Desktop, and Microsoft® Outlook® to deliver essential information when it's needed. For example, MyAssistant improves operations by automatically:

- Identifying subcontractors with insurance expiring in 30 days and sends them a personalized email requesting an updated certificate.
- Providing each project manager with a list of costs codes that are over budget or close to going over for their jobs.
- Generating and distributing each project manager's job reports on a regular schedule.
- Alerting affected parties when a change request, RFI, or submittal is overdue.
- Enabling project managers to check their job profitability from their Windows Desktop, and notifying team members by email when jobs drop below a profit threshold.
- Indicating jobs or contracts not billed in a certain number of days.
- Alerting you when costs are entered to phases without estimates, to a job that has billed completely, or to a closed job.

Benefits

- Cost control
- Change management
- Insurance compliance
- Automated alerts
- Tenant statement distribution
- Personalized email reports
- Human resources
- Subcontractor communication
- Project documents
- Payroll direct deposits
- Lease management
- Work orders, purchase orders, and invoices
- Receivables
- Setup and processing
- Automated letters
- Workflow integration

Stay in the loop on all fronts

With so many details, documents, and data that circulate throughout your business at any given time, it's easy to overlook important information. MyAssistant helps keep you in the loop on all fronts, so you can act quickly to take advantage of opportunities and avoid issues important to your role and business. Let MyAssistant take action for you so you can focus your attention to where it's needed most and be more productive. For example, it can:

- Provide a list of invoices as soon as they're overdue, and remind past due customers of their delinquency.
- Send employees their direct deposit play stubs.
- Generate and distribute tenant statements.
- Notify you of work orders completed and not billed in a certain period of time.
- Indicate leases or lease options expiring.
- Reveal invoices with discounts soon to expire.
- Generate a list of AP invoices that should be paid after a cash receipt.
- Produce alerts when working capital drops below a certain amount.
- Identify terminated employees and send the insurance company a letter to remove them from coverage.
- Learn invoices not coded to a job but that use a job account number.
- Audit processes such as job, contract, or employee setup to ensure they are completed correctly.

Simple to use and set up

Whether you choose to create your own MyAssistant Tasks using a simple wizard, or you use one of the 350 prebuilt rules in the product, your options are practically limitless. You can:

- Identify exactly what will be monitored or take place.
- Schedule a task to run at specific times, after the completion of a Sage 300 Construction and Real Estate task, or run it on demand.
- Identify who will be notified and the information they will receive.

If you're interested in learning more about Sage 300 Construction and Real Estate MyAssistant, contact your business partner or call your customer account manager at 800-858-7095.

Last Updated	Task Name
01/24/2012	Bank Accounts with balances under specified threshold
12/13/2011	Change Requests submitted and not approved
12/13/2011	Submittals not returned in 5 days
12/07/2011	Pending Invoices out for approval too long
12/07/2011	Cost Codes over budget by five percent or more
12/07/2011	Jobs not billed in 40 days
12/07/2011	Vendors with expiring Worker's Comp. Insurance
12/06/2011	Send Employee their Direct Deposit Statement
12/06/2011	Subcontracts without a signed contract
12/06/2011	PJ Submittals coming due
12/06/2011	Cost Codes with committed cost greater than the estimate
12/06/2011	Customers with a balances over \$ 10000
12/06/2011	Invoices open for specified number of days
12/06/2011	Work Orders waiting on parts
12/06/2011	Work Orders not scheduled
12/06/2011	RFIs not returned in 5 days
12/06/2011	AR Invoices older than 30 days

MyAssistant can take action for almost any scenario. Use a simple task wizard to tell MyAssistant what you want done. Stay in the know about critical project details, including the most important—profit erosion!