MyAssistant
For Sage Timberline Office

MyAssistant identifies important issues and improves communication for contractor

Foremost Management, Inc. has more than 60 years of experience in project development, mechanical, and general contracting. Foremost has been using Sage Timberline Office software since 2002 and implemented MyAssistant in 2007. Kay Howe, CFO, reports that MyAssistant has helped improve communication: "One of the biggest challenges in any company is effective communication. MyAssistant helps speed up that communication while taking some of the surprises out of what is being relayed."

"Our management team and project managers receive either daily or weekly notifications of Accounts Receivable outstanding balances. In the past, project managers wouldn't have this information until they arrived at the job meetings. Now, no one is surprised at who is past due. Project Managers also receive regular updates on cash collected. So they receive positive feedback on their collection efforts."

"We thought we had a few credits out there with our vendors for returned material. So we created a MyAssistant Task to notify us of vendors with a credit balance. We had someone call these vendors and asked them to send us a check. We collected approximately $5,000 of our cash that our vendors were using."

"We use multiple Timberline Office data folders and we sometimes enter the same AP invoice in different data folders. We have paid vendors twice for the same invoice. MyAssistant allowed us to find these and get 'credits' for overpaying."

"MyAssistant has saved us money by tracking change requests for closed jobs. Someone closed a job because the contract amount equaled the billed amount. MyAssistant pointed out open change requests on a closed job which gave us notice to pursue the change orders. We also get notified when AP invoices are posted to a closed job. This lets us know that we've either coded the invoice to the wrong job or you have costs on the job that you didn't know about."

"Our state jobs have a special billing form that requires the bills to be created outside of Timberline. Sometimes we forget to enter the invoice after the job is billed, resulting in our books being incorrect. So we create a MyAssistant task to send management a list of active jobs that haven't been billed in 35 days."

"MyAssistant saves time reconciling job costs to the General Ledger. It will automatically tell us if an account is coded to the right job cost prefix."

"I am automatically notified if we have a balance in a clearing account (federal deposits). This lets me know that something didn't get paid."

"We also use MyAssistant to notify us if we setup an employee without a birth date or default worker's comp code. We track drug testing too and were able to find two employees that were avoiding their tests."

"We have several companies in different Timberline data folders. With MyAssistant I can set up a Task to run across all Timberline data folders. The Notification Log then allows me to see issues across companies in one spot."

Kay reports the productivity gains from MyAssistant have been well received: "Rather than printing out reports and digging through data, we get an automated notification of potential issues. MyAssistant is a must-have for anyone using Sage Timberline. I love it!"

CUSTOMER
Foremost Management

INDUSTRY
General Construction
Specialty Construction

LOCATION
Jackson, OH

INNOVATIVE SOFTWARE DESIGN
Founded in 2004, Innovative Software Design provides products and services that extend the power of Sage Timberline Office. The people behind ISD have more than sixty years of experience at Sage Timberline and are inspired by creating innovative solutions that help businesses be more productive.

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