MyAssistant

For Sage Timberline Office

Construction

Would you like your Timberline Office software to automatically

- Identify vendors with insurance expiring in 30 days and send them a letter?
- Send past due customers a list of their delinquent invoices?
- Generate and distribute personalized reports on a regular schedule?
- Notify executives when jobs drop below a profit threshold?
- Send each project manager a list of costs codes that are over budget for their jobs?
- Audit processes such as job, contract, or employee setup to ensure they are completed correctly?

With MyAssistant, it can

🐱 Vendor Insurance (General Liability) expiring soon - Message (HTML)												
÷ E	ile <u>E</u> dit <u>V</u> iew	Insert i	F <u>o</u> rmat <u>T</u> ools <u>A</u> ctions	Help								
🗄 🚑 Reply 🖓 Reply to All 🙈 Forward 🎒 🗈 🗏 🔻 🏠 🏝 🕺 🐥 🖌 🔺 - 🛷 - A [*] 🞯 💯 💂												
From: Jeff Adams [Jeff.adams@i-s-design.com] Sent: Tue 4/15/2008 11:38 AM To: jeff.adams@i-s-design.com Cc: Subject: Vendor Insurance (General Liability) expiring soon												
Vendors with expiring General Liability Insurance												
	Options Vendor		Vendor Name	Contact Name	Phone	Expiration Date						
	Click here	100	A-1 Electric Company	Carlton; Rob	(503)744-3200	6/30/2002						
	Click here	103	Ace Drywall	Ryan; Paul	(503)858-3838	4/30/2002						
	Click here 102		Acme Door & Glass Distributors	Johnson; Bill	(503)245-8162	4/30/2002						
	Click here	200	B & M Marble, Inc.	Huddleston; Cindy	(503)242-1500	6/30/2002						
	Click here	203	Barth Electric	Walker; Dennis	6/30/2002							
	Click here	302	Commercial Pest Control	Wade; Penny	(503)626-5575	6/15/2002	~					

Specifically designed for Timberline Office, MyAssistant proactively identifies what needs to be done, determines who needs to be informed, and automatically performs the task. MyAssistant uses Microsoft Outlook to deliver essential information, when it's needed.

Be informed -



Put MyAssistant to work for you

Use a simple wizard to give MyAssistant Tasks. For each Task, tell MyAssistant what you want done and when. Use any of the prebuilt Tasks or define your own.

- Select one of the more than 270 prebuilt rules, or create your own, to identify exactly what should be monitored or occur
- Schedule a Task to run at specific times, or run it on demand
- Identify who will be notified
- Define the format and content of the recipient's email message
- Attach one or more reports to each email, with report content specific to the email recipient
- · Attach any documents or files to each email

Get control with MyAssistant Tasks -

🧐 My Assistant for Sage Timberline Office									
Eile Edit View Reports Icols Help Image: Second Sec									
My Tasks Project Management									
🖅 🛄 All Tasks		Activated	Task Name 🔺	Schedule 🔼					
ia⊶ia Accounts Payable ia⊶ia AR and Billing		~	Change Requests submitted and not approved	At 07:00 AM every Thur					
i ⊂ Cash Management			Change Requests where estimated cost is greater than the \ldots	On Demand					
Equipment Cost		~	Correspondence Items waiting response	On Demand					
ia - 🤄 General Ledger ia - 🗀 Job Cost		Image: A start of the start	Drawing Log update	At 01:00 AM every Mon					
ar ⊃ Payroll			Drawings not sent to the Superintendent	On Demand					
Project Management			Incomplete submittals coming up on required finish date	On Demand					
		 Image: A start of the start of	Internal budget change over \$ 2,500	At 12:00 AM every Sund					
🛄 Job Setup		 Image: A set of the set of the	Jobs that have not been released to accounting	On Demand					
i ⊕ ⊷ [on Property Management i ⊕ ⊷ [on Property Management			Jobs with internal budget changes more than \$ 5,000	On Demand On Demand On Demand On Demand					
			Jobs with too many open Change Requests						
🗄 🖕 Vorkflow Audits			Jobs without a specified contact on Job Contact List						
📝 My Tasks			Open Correspondence Item requiring action						
		V	Past due Meeting Minutes Items	At 07:00 AM every Thur					
🧭 My Notifications	<			×					
Ready 🧾									

MyAssistant is a powerful tool to manage your business:

- Inform project managers of jobs not billed in 30 days and with costs exceeding billings
- Upon receiving a cash receipt, receive a list of AP invoices that should be paid
- Identify terminated employees and send your insurance company a letter to remove them from your coverage
- Receive alerts when working capital drops below a certain amount
- Recognize new vendors and request a W-9 from them
- Know when invoice discounts are about to expire
- Send each project manager a list of overdue RFI's, submittals, and change requests, with detailed logs attached
- Learn of invoices not coded to a job but use a job account number
- Notify your president of employees celebrating a birthday

Improve communications, reduce errors, and increase productivity. **Work smarter with MyAssistant**

For a product demonstration or more information please contact your Sage Timberline Office Business Partner.

*Sage Timberline Office is a product and a registered trademark or trademark of Sage Software, Inc. or its affiliated entities and is used with permission. "My Assistant" is a product of Innovative Software Design, which is not an affiliated entity of Sage Software, Inc.

© 2005 Innovative Software Design Corporation. All rights reserved. * Microsoft, Office and Outlook are either registered trademarks or trade marks of Microsoft Corporation in the United States and/or other countries. The names of actual companies and products mentioned herein may be the trademarks of their respective owners.



