

MyAssistant

For Sage Timberline Office

CUSTOMER SUCCESS STORY



MyAssistant generates and distributes reports automatically

Chrisp Company, incorporated in 1968, performs highway improvement projects in three states and specializes in road striping. Tammie Allison, Assistant Controller, implemented MyAssistant in 2008 to help generate and distribute reports:

“I couldn’t remember to email everybody all their reports, because I’m too busy myself, so when I saw MyAssistant was able to take all those reports and automatically generate them for me, it was awesome.”

“For example, MyAssistant sends weekly overtime reports that show excess overtime for each department and for the entire company. We also have a report that shows missing change orders that we have out on jobs, and that goes to operations once a week. We have another weekly report that shows operations if anyone had yard time in excess. Monthly I send out our financial package. We even have a report that details birthdays that employees are having, since we have different calendars people are using it’s a nice way to get that information to everyone.”

“We started off just sending Timberline data in email [using prebuilt MyAssistant Tasks], and from this everyone wanted to see even more detail, so the original Tasks that were sending information within the email itself were changed to deliver full reports attached to each email.”

“We have about ten to twelve basic reports, but then these have been modified to send to different people in different sort orders and with different conditions. For example, each department receives a specific report just for their department and then upper management will receive a report that provides information for every department. From just these few basic reports we have quite a few different emails that are sent out with different reports attached.”

“There are a number of other MyAssistant Tasks we hope to implement in the future too—we have a long list.”

“In the past, if I was too busy there were people waiting for me to actually get them a report, and reports slipped through the cracks—they wouldn’t get a report when everyone thought that they had, for example. So now there’s an audit trail to show who did receive a report, and the reports are sent to everyone on a regular schedule. They have the information they need in a timely manner.”

“MyAssistant brings peace of mind—now I don’t have to worry about forgetting something. I’m not responsible for generating a number of reports to so many people. Twenty five or so people in our office need certain reports weekly and monthly. Now I don’t have to worry about it—it’s all sent automatically, and they get their information. I just love that I don’t have to worry about it.”

CUSTOMER

Chrisp Company

INDUSTRY

Highway Improvement

LOCATION

Fremont, CA

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.