MyAssistant helps specialty contractor manage service business

Alan Fletcher, President of Oilfield Electric, purchased MyAssistant in 2008: "We saw great value in having an automated alerting system rather than having to remember to run reports and access data in other ways." He began using MyAssistant with Sage Timberline Office's Service Management application in May, 2009. He reports:

"Before MyAssistant, many completed work orders slipped through the cracks. It could be weeks, sometimes months, before someone happened to notice that billing should have been completed. Now we know if we need to bill. And sometimes work orders are not identified by our service crew as being complete. The 'Work Orders not completed and not billed' Task flags WO's that have not had activity for awhile so we can review each one to determine if they should be billed."

"We created a 'Work Orders invoiced in the last 30 days' alert to give us a monthly summary of how our jobs are performing. The alert is sorted by profit margin so that we can easily review under-performing and over-performing jobs, and contrast and compare them with our jobs that perform as expected."

"Our 'Work Orders not scheduled' Task identifies WO's that have not been scheduled so they do not languish. We also have a MyAssistant Task that identifies WO's that have had the scheduled date slip and require updating. And the 'Work Orders that have not been assigned to a technician' Task ensures that we have scheduled each WO to a technician so that the WO is not forgotten."

"The 'Parts where the quantity on hand is less than the minimum stock quantity' Task is great for reordering, and 'Parts with a negative quantity on hand' aids us in staying current on our inventory counts—this was previously dealt with at the end of the year during our physical inventory."

"Completion of our jobs usually depends upon parts being received. 'Purchase Order Items without receipts after the date promised' helps us ensure that parts are received on a timely basis so that we can schedule workers, get the job done, and complete billing."

"The 'Purchase Order Items where the quantity received is less than the quantity invoiced' Task catches vendor invoicing errors."

"Invariably, there are PO's that need to be canceled, and they are usually not recognized by the individual who created the PO. The 'Work Orders that have been canceled and have an open PO' Task helps us ensure that 'inactive' PO's are properly dealt with."

"A number of our customers require Purchase Order numbers. The 'Work Orders without a valid PO number' Task lets us know if a PO number has not been assigned to open work orders for customers who require them. It allows us to control our workflow and ensure that we can bill for a job upon completion instead of relying on a customer who has already received our service and feels no urgency to supply a PO number for payment after the job is already complete."

"We also use MyAssistant to ensure data has been properly entered. For example, it lets us know when employees are not set up to send time to Payroll."

"Without MyAssistant you're dependent on your memory or organizational skills to know that you need to evaluate certain data, but with MyAssistant you don't have to be concerned about that—it will automatically send you an email letting you know the criteria that you want to evaluate and the data you need to make that evaluation. It's a great product."

CUSTOMER
Oilfield Electric

INDUSTRY
Electrical Contracting & Service

LOCATION
Ventura, 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.

INNOVATIVE SOFTWARE DESIGN