

# MyAssistant

For Sage Timberline Office



## CUSTOMER SUCCESS STORY

## MyAssistant automatically delivers important information in real time

Rex Moore Electrical Contractors, founded in 1922, is a family owned and managed electrical and integrated systems engineering and construction company operating throughout seven western states. Neelam Basra, Rex Moore Information Technology, implemented MyAssistant in 2007 when they began implementing the Sage Project Management, Contracts, and Billing modules: “With this implementation, we wanted something to catch things in ‘real-time’.”

“We have over 300 active Tasks set up in MyAssistant. For example, we use MyAssistant to notify us of:”

- Job completion: “When a job is 90% complete, MyAssistant notifies our Project Coordinator, Purchasing Agent and Project Manager so they can begin the job closeout process.”
- Suspense account balances: “Our Controller is notified if a Suspense Account has a balance so he can begin an investigation.”
- Change Requests in Project Management: “The project team accountant is notified when change requests are ready to post to Job Cost.”
- Job Phases (Cost Codes) over budget: “We look at JC Phases over budget and notify the project team.”
- Vendor insurance expiration: “MyAssistant looks at our vendor’s insurance expiration dates to determine if any are going to expire in the next 60 days. This allows us to be pro-active in contacting our vendors so we can be sure they have continuous coverage.”
- Employee recognition: “MyAssistant notifies our HR department daily of all employees’ birthdays and hire dates. We’ve also set up a Task to run on Fridays looking for employee birthdays and anniversaries that fall over the weekend so they can be recognized that day.”
- Contract setup errors: “We set up our contracts in a way that allows us to categorize revenue to the proper profit center. We use MyAssistant to look at all contracts and notify the accounting department of any discrepancies.”
- Job Cost Extras setup: “We use MyAssistant to make sure all Extras for each job are set up to the proper general ledger base account.”

Neelam also commented on the support provided by Innovative Software Design: “Whether it’s by email or by phone, I always get the help I need.”

“After implementing MyAssistant, we see this as the tool we were looking for. This is a great product that gives you timely information! You could have 1,000 reports, but you’d still have to remember to run them, send them, and then someone has to go through them to find the items that need attention. MyAssistant automatically sends the information to the people that need it.”

### CUSTOMER

Rex Moore

### INDUSTRY

Electrical Engineering and Construction

### LOCATION

Sacramento, 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.