



Improve Your Service Business

MyAssistant for Sage Timberline Office proactively identifies what needs to be done, determines who needs to be informed, and automatically performs the task, helping you:

Complete Work Orders

- See unassigned work orders
- Send work orders to a technician's phone
- Be notified when it's been seven days since time was entered against an open work order
- Receive a list of work orders waiting on parts

Invoice Promptly & Accurately

- Know when work orders have been completed but not billed
- See discrepancies between hours billed and the time entered for a work order
- Ensure you're billing for all you're entitled to by reviewing work orders with costs flagged as non-billable
- Ensure invoices have required PO numbers
- Automatically generate and send invoices

Get Paid

- Identify balances aged past a certain period of time or over a dollar amount immediately
- Notify technicians if their customer is COD so they can collect at the site

Recognize Profitability & Trends

- Be alerted when three or more calls are received for a location in the last two weeks
- Know who's over and underperforming—see the revenue, expenses, and net profitability of technicians over the last month

Keep on Top of Needed Parts & Inventory

- Receive a list of parts required for upcoming preventative maintenance
- Reorder promptly when you learn of parts that fall below their reorder threshold
- Know immediately if parts needed to complete a work order are late

Manage Vendors

- Cancel unnecessary purchase orders after cancelled work orders with PO's are brought to attention
- Ensure you're not being shortchanged when you're invoiced for more items than you received
- Identify purchase order items received with a quantity lower than their order amount

MyAssistant email example ▼

Work Orders completed and not billed - Message (HTML)

From: MyAssistant for Sage Timberline Office [jeff.adams@i-s-design.com] Sent: Wed 6/17/2009 3:04 PM
 To: Jeff Adams
 Cc:
 Subject: Work Orders completed and not billed

Work Orders completed and not billed

Options	WO #	Location	Technician	WO Amount	Cost
Click here	4723	First Bank	Smith; Christopher M.	662.00	533.08
Click here	6062	Mack's BBQ Emporium	Tastic; Mack	74.25	30.00
Click here	7041	Pacific Properties	Lew; Christine	569.75	265.00
Click here	7239	Amerifirst Office	Mason; John	215.00	100.00
Click here	7248	Polymer Records	Fleckman; Bobbie	415.00	204.96

Click when available for more options.

Automated Alerts, Report and Document Distribution by:
MyAssistant for Sage Timberline Office
www.i-s-design.com

Catch Data Entry Errors

- Identify duplicate jobs or sites immediately after they're created
- Learn of employees not set up to send time to Payroll before you process
- Catch work orders without a required job or purchase order number, or sites not set to accumulate to a job

Stay on Top of Service Agreements

- Contact customers when their agreements or quotes are expiring
- Learn of agreements that were not renewed or have an unbilled balance
- See leads that have not been contacted in a certain period of time

Customize MyAssistant to Your Business

In addition to the more than 300 pre-built rules that come with MyAssistant, you can also create your own – use a simple wizard to tell MyAssistant what you want done and when. And MyAssistant works with all your Sage Timberline Office software to notify who you want with the information they need.