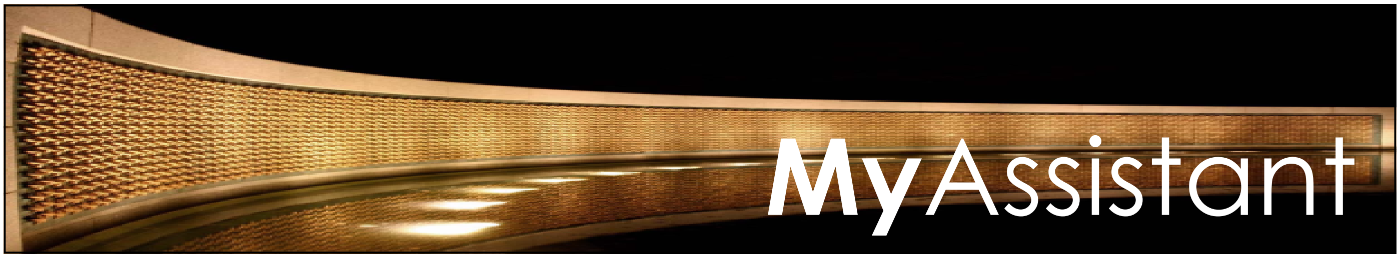


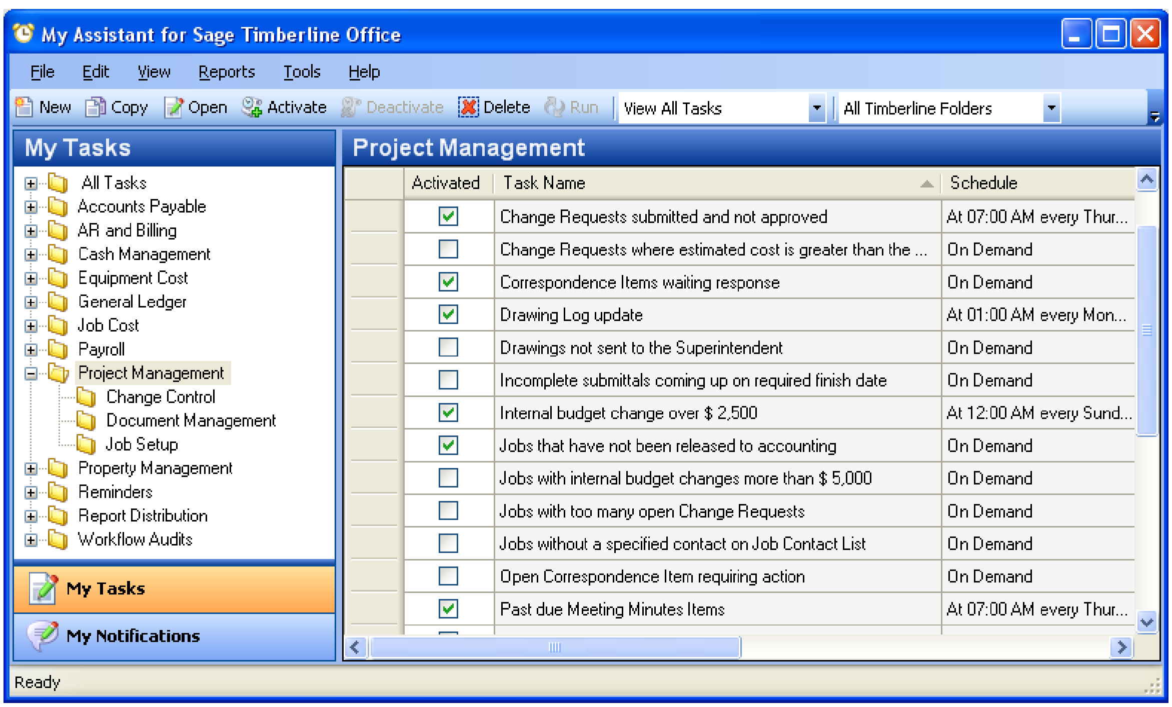
For Sage Timberline Office

MyAssistant is an easy-to-use tool that proactively monitors your business, identifying important issues and alerting the people that need to know. MyAssistant uses Microsoft Outlook to deliver needed information, when it's needed. For example, MyAssistant can automatically:

- ☐ Send notices to customers with past due balances
- ☐ Run and distribute personalized reports to project managers, customers, tenants, and others
- ☐ Identify vendors with insurance expiring in 30 days and send them a letter
- ☐ Notify property managers when leases are about to expire or when units are vacant
- ☐ Send each project manager a list of costs codes that are over budget for their jobs
- ☐ Audit processes such as job, lease, contract, or employee setup to ensure they are completed correctly

TASKS

MyAssistant Tasks define what you would like to monitor in your business and the action to take when an issue is identified. Schedule when each Task runs and be notified in Microsoft Outlook® when a Task has found something needing attention. Get started with any of more than 125 pre–built construction and 75 property management Tasks, or create your own using a simple wizard.



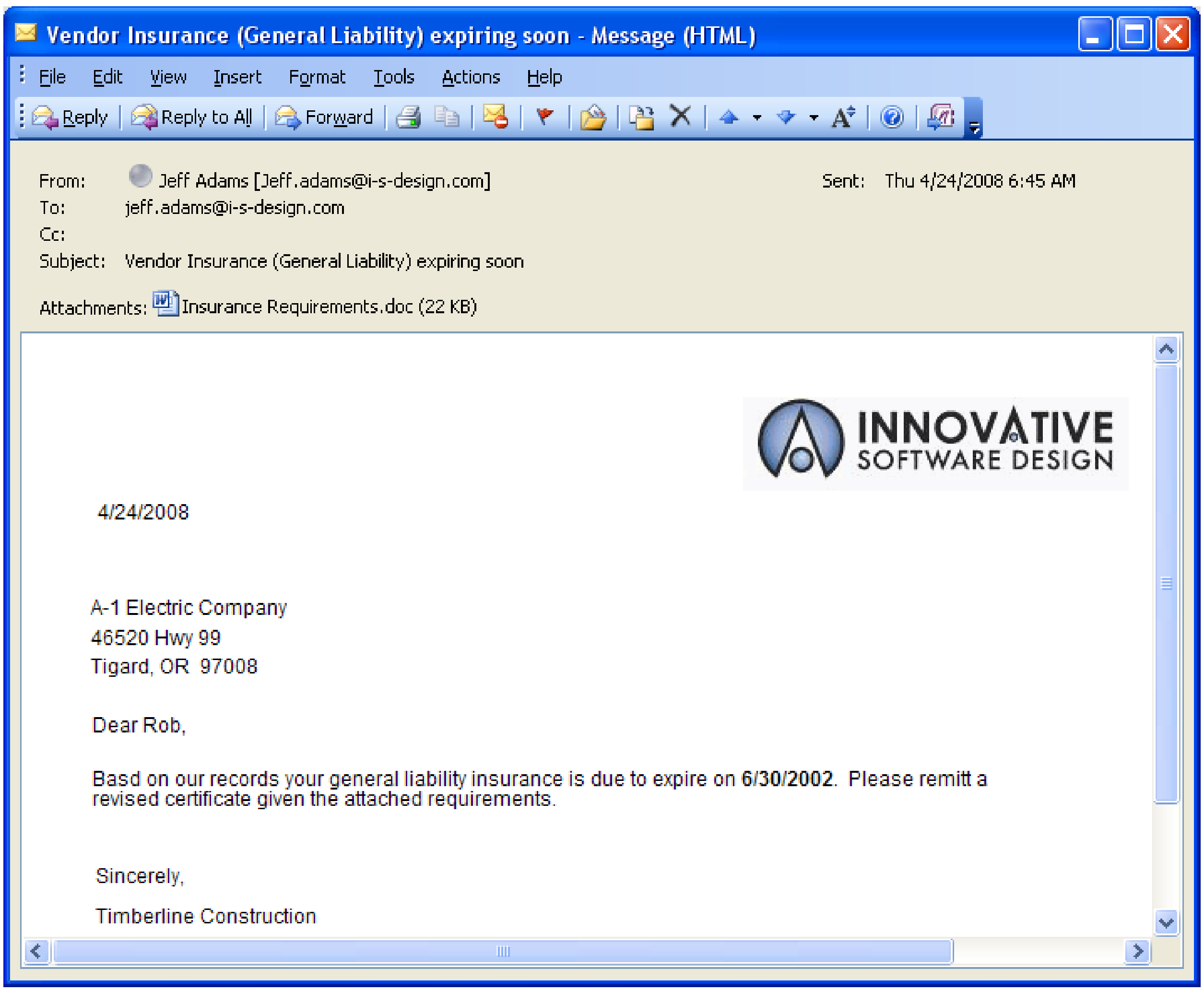
For each Task you can:

- ☐ Define what should be monitored by selecting one of the 260 pre-built Conditions, or write a custom Condition
- ☐ Schedule the Task to automatically run on one or more schedules. Tasks can be run daily, weekly on specified days, or each month.
- ☐ Designate one or more Timberline data folders for the Task to monitor

- ☐ Assign who to notify when the specified condition is met. Select email addresses from Outlook or specify a Role to send a specific person—project manager, vendor, customer, tenant, employee, etc.—just their notifications.
- ☐ Specify who the people being notified will reply to
- ☐ Detail what to communicate in the email. Send text, a simple table of Timberline Office data, or use Email Templates to include a letter, report, or form in the body of the email.
- ☐ Specify one or more reports to be run and attached to each email. Reports can be filtered so each recipient receives just their information with the report.
- ☐ Use security to control who can see or use each Task

Email Templates

Email Templates allow you to determine the format and content of each email message. Use Email Templates to send letters, forms, or reports right in the body of the email. With MyAssistant Email Templates there are no email attachments to open – each recipient will view information directly within the email.



From: Jeff Adams [Jeff.adams@i-s-design.com] Sent: Thu 4/24/2008 6:45 AM
To: jeff.adams@i-s-design.com
Cc:
Subject: Vendor Insurance (General Liability) expiring soon
Attachments: Insurance Requirements.doc (22 KB)

INNOVATIVE SOFTWARE DESIGN

4/24/2008

A-1 Electric Company
46520 Hwy 99
Tigard, OR 97008

Dear Rob,

Basd on our records your general liability insurance is due to expire on **6/30/2002**. Please remitt a revised certificate given the attached requirements.

Sincerely,

Timberline Construction

With Email Templates you can:

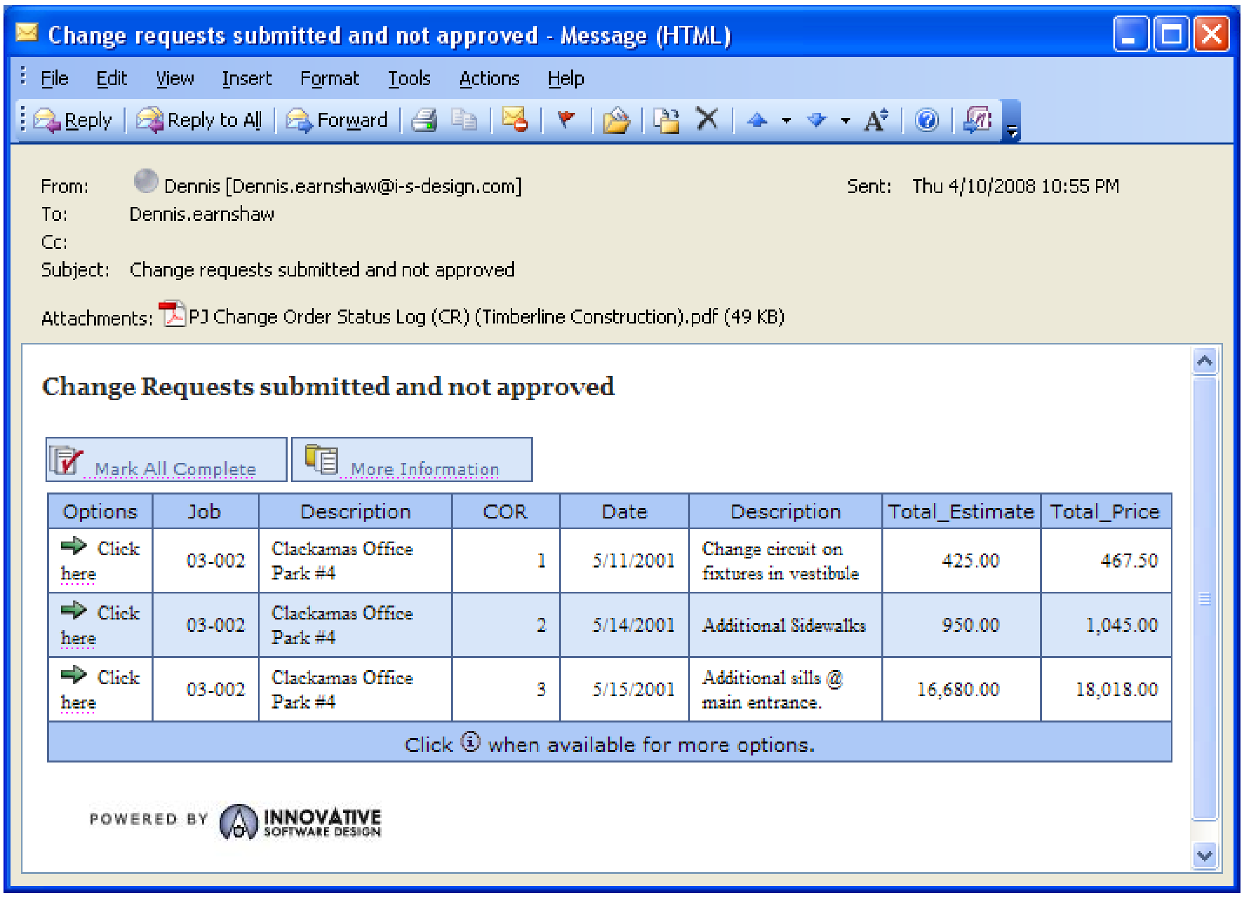
- ☐ Create a personalized message for each email recipient
- ☐ Include logos, charts, or other images
- ☐ Automatically generate attractive HTML email messages
- ☐ Reuse Email Templates for multiple Tasks
- ☐ Use the power of Crystal Reports to define an unlimited number of Email Templates

Reports & Other Documents

MyAssistant can automatically run and distribute reports. As emails are generated, MyAssistant can filter the content of the reports attached to each email to include information specific just to the recipient. For example, send each Project Manager reports for their jobs or each customer reports detailing their invoices. In addition to reports, other files can be attached to emails. For example, automatically send new vendors a request for W9, or attach a Word document detailing your insurance requirements to vendors with expiring insurance.

With Attachments you can:

- ☐ Use Crystal Reports to deliver reports and forms specific to the email recipient
- ☐ Attach Microsoft Word, Microsoft Excel, PDF, or other files to each email



Change requests submitted and not approved - Message (HTML)

File Edit View Insert Format Tools Actions Help

Reply Reply to All Forward

From: Dennis [Dennis.earnshaw@i-s-design.com] Sent: Thu 4/10/2008 10:55 PM
To: Dennis.earnshaw
Cc:
Subject: Change requests submitted and not approved

Attachments: PJ Change Order Status Log (CR) (Timberline Construction).pdf (49 KB)

Change Requests submitted and not approved

Mark All Complete More Information

Options	Job	Description	COR	Date	Description	Total_Estimate	Total_Price
Click here	03-002	Clackamas Office Park #4	1	5/11/2001	Change circuit on fixtures in vestibule	425.00	467.50
Click here	03-002	Clackamas Office Park #4	2	5/14/2001	Additional Sidewalks	950.00	1,045.00
Click here	03-002	Clackamas Office Park #4	3	5/15/2001	Additional sills @ main entrance.	16,680.00	18,018.00
Click ⓘ when available for more options.							

POWERED BY INNOVATIVE SOFTWARE DESIGN

Conditions

MyAssistant Conditions define what MyAssistant monitors within your business. For example, a Condition can check to see if a vendor has insurance expiring in the next thirty days. When the Condition is met, MyAssistant takes action. Define what should be monitored by selecting one of the 260 pre-built Conditions, or write a custom Condition.

- ☐ Copy and modify any of the prebuilt conditions
- ☐ Use simple logic to write a condition—SQL knowledge is not required
- ☐ Create and use formulas within conditions

Roles

MyAssistant Roles determine the specific person that should be notified when a Task's Condition is met. For example, use a Vendor Role to send an email to each Vendor that has expiring insurance. MyAssistant allows an unlimited number of roles such as Project Manager, Vendor, Customer, Tenant, and Employee.

E-mail

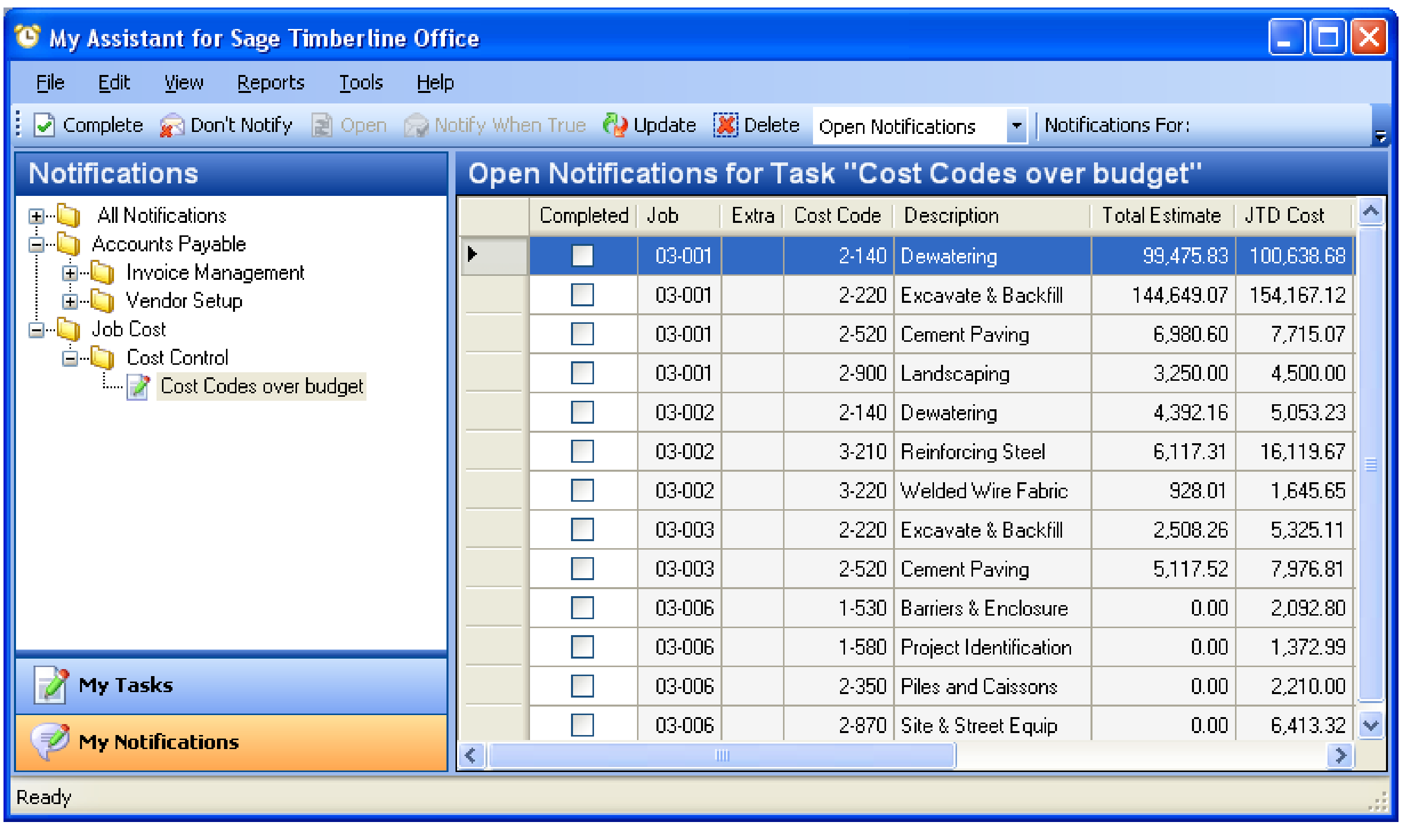
MyAssistant uses Microsoft Outlook to notify the email recipient of issues identified by Tasks. Email recipients can work directly with the information in the email. For example, a project manager that has received an email detailing the cost codes for their jobs that are over budget can open a cost code inquiry right from the email. E-mail messages can be sent for each Task or output from Tasks can be grouped into a Daily Summary email in which all Task output for a recipient is grouped into a single email.

With MyAssistant emails you can:

- ☐ Mark notification items complete
- ☐ Ask to be notified again if the issue hasn't been addressed in a period of time
- ☐ Indicate you do not need to be notified of the situation again
- ☐ View any Sage Timberline Office* report or inquiry
- ☐ Click the reply button in the email to respond to the appropriate person

Notification Log

The MyAssistant Notification Log provides each person one place to view and manage their notifications generated by Tasks.



With Notification Log you can:

- ☐ Filter the Notifications displayed for each person
- ☐ View open, closed, or all notifications
- ☐ See a list of Tasks that have generated Notifications and each specific Notification for that Task
- ☐ Run specific Timberline Office reports or inquiries right from the Notification Log
- ☐ Export Notification data to Microsoft Excel
- ☐ Update the Notification list with the single click so that you always have current information

For a free product demonstration, call us at (610) 862-1998.

CPA Technology
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p 610.862.1998 f 610.862.3200 w CPATechnology.net