

MyAssistant

For Sage Timberline Office



Would you like your Timberline Office software to automatically

- Identify vendors with insurance expiring in 30 days and send them a letter?
- Send past due customers a list of their delinquent invoices?
- Generate and distribute personalized reports on a regular schedule?
- 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?

Be informed ▼

With MyAssistant,
it can

Vendor Insurance (General Liability) expiring soon - Message (HTML)

From: Jeff Adams [Jeff.adams@i-s-design.com] Sent: Tue 4/15/2008 11:38 AM
To: jeff.adams@i-s-design.com
Cc:
Subject: Vendor Insurance (General Liability) expiring soon

Vendors with expiring General Liability Insurance

[Mark All Complete](#) [More Information](#)

Options	Vendor	Vendor Name	Contact Name	Phone	Expiration Date
Click here	100	A-1 Electric Company	Carlton; Rob	(503)744-3200	6/30/2002
Click here	103	Ace Drywall	Ryan; Paul	(503)858-3838	4/30/2002
Click here	102	Acme Door & Glass Distributors	Johnson; Bill	(503)245-8162	4/30/2002
Click here	200	B & M Marble, Inc.	Huddleston; Cindy	(503)242-1500	6/30/2002
Click here	203	Barth Electric	Walker; Dennis	(503)456-3945	6/30/2002
Click here	302	Commercial Pest Control	Wade; Penny	(503)626-5575	6/15/2002

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 essential information, when it's needed.

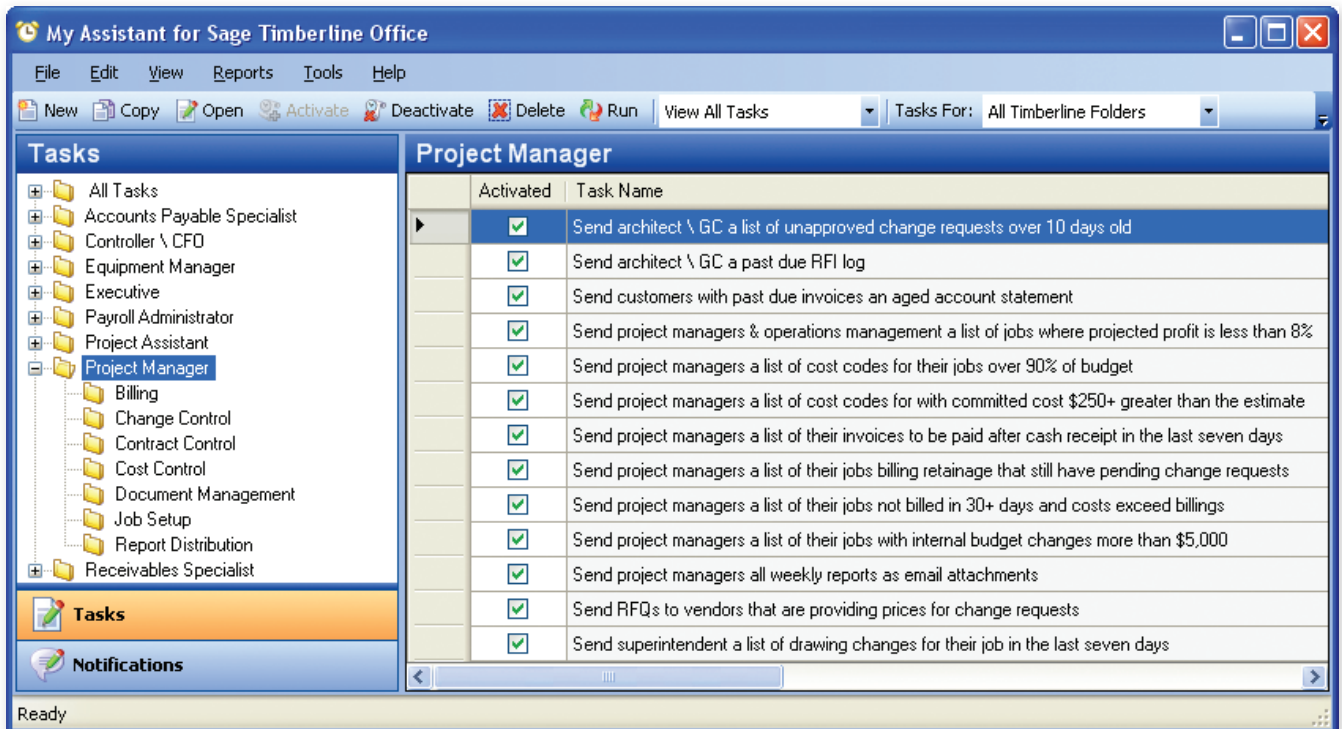


Put MyAssistant to work for you

Use a simple Task wizard to tell MyAssistant what you want monitored, when you want it checked, and how to respond. Use any of the prebuilt Tasks or define your own.

- Select one of the more than 250 pre-built conditions, or create your own, to identify exactly what should be monitored
- Schedule a Task to run at specific times, or run it on demand
- Identify who will be notified when a Task's condition is met
- Define the format and content of the recipient's email message
- Attach one or more Timberline reports to each email, with report content specific to the email recipient
- Attach any documents or files to each email

Get control with MyAssistant Tasks ▼



MyAssistant is a powerful tool to manage your business:

- Inform project managers of jobs not billed in 30 days and with costs exceeding billings
- Upon receiving a cash receipt, receive a list of AP invoices that should be paid
- Identify terminated employees and send your insurance company a letter to remove them from your coverage
- Receive alerts when working capital drops below a certain amount
- Recognize new vendors and request a W-9 from them
- Be notified of lease options expiring
- Send each project manager a list of overdue RFI's, submittals, and change requests, with detailed logs attached
- Learn of invoices not coded to a job but use a job account number
- Notify your president of employees celebrating a birthday

Improve communications, reduce errors, and increase productivity.

►► **Work smarter with MyAssistant**