

MyAssistant for Sage Timberline Office - Task List

Service Management

Parts - Inventory

Purchase Order Items where the quantity received is less than the quantity ordered
Purchase Order Items without receipts after the date promised
Purchase Orders for Work Orders with no receipts after 20 days
Purchase Order Items where the quantity received is less than the quantity invoiced
Purchase Orders linked to a Work Order and are backordered
Purchase Orders ready to be sent to Vendors
Parts where the quantity on hand is less than the minimum stock quantity
Parts with a negative quantity on hand

Service Agreements

Agreements expiring in the next 30 days or in the last 120 days
Parts needed for PM tasks scheduled for the next month
Agreement Quotes expiring in the next 30 days
Active Leads not contacted in specified days
Agreements that expired in the last 30 days and were not renewed
Agreements that have expired in the last 30 days with an unbilled balance
Customers who have not purchased an agreement in 12 months

Setup - Other

Employees not set up to send time to Payroll
Employees set to send time to payroll and missing needed settings
Service Sites missing a sales person
Service Sites that have been newly added
Vehicles due for an oil change

Work Orders

Work Orders completed this week
Work Orders entered yesterday and assigned as Urgent or High priority
Work Orders entered today that have a specified Problem code
Work Orders invoiced in the last 5 days
Work Orders missing a sales person
Work Orders not scheduled
Work Orders that have been canceled and have an open PO
Work Orders that have been completed and not billed
Work Orders that have not been assigned to a technician
Work Orders waiting on parts
Work Orders with costs and flagged as non-billable
Work Orders Quotes that expired in the last 7 days
Work Orders without a job number
Work Orders without a PO number

Invoices ready to be sent

Work Orders completed and not billed