

## Sage Timberline Office Customers Use of MyAssistant

The MyAssistant for Timberline Office software can be used many different ways. The following list of examples was collected from Timberline Office customers. We hope that you find this informative.

**Safety.** In an effort to improve safety on the job we track safety violations by employee. We set up a custom field on the Payroll employee record to track safety violations and MyAssistant notifies me when an employee has reached a certain number. – GC in Illinois

**Work Order Profitability.** I get a list of Work Orders where we will make less than 24% profit. This helps us evaluate our processes and improve profitability. – Specialty Contractor in New York

**Payroll Errors.** We need to make sure we are paying the correct payroll taxes so we are notified when an employee works in a state that's different than their home state and they do not have a reciprocal agreement setup in Timberline Office Payroll. – Specialty Contractor in Alabama

**Tax Reporting.** Commitments are being created wrong- taxable status not entered correctly, fields not filled with the proper values. This all came to light during a recent audit so now I get a list of all new commitments so I can review and fix entries before they become an issue. – Specialty Contractor in Texas

**Vendor Insurance.** We use a lot of prebuilt tasks like Vendors with expiring insurance. Once a week we get an email and boom we just know what's going on. – GC in Michigan

**Unbilled Costs.** We have had a problem with invoices getting posted to a closed job so now I get notified if this happens. – GC in Texas

**Billings.** I want to get paid for the work that we are doing so I have MyAssistant tell me when billings aren't getting done. – GC in California

**Tenant Communications.** [MyAssistant] tells me when we have received cash from rapid remit, and then tells the tenant that their payment has been applied. – Property Manager in California

**Ad hoc Reports.** Auditors ask for all kinds of data. I use MyAssistant to pull what I need to give the auditors- for example; I get a list of JC Jobs with costs or billings this year. – GC in Maryland

**Cost Control.** Construction payables can get out of hand so we monitor construction payables open AP invoices vs. commitment status. This can prompt a meeting to go over construction payables. – Property Management firm in New York

**Sarbanes-Oxley Compliance.** In order to stay compliant with Sarbanes-Oxley I have MyAssistant track all entries to AP Vendor Setup. – Specialty Contractor in Maryland

**Estimating.** I am trying to see where my Estimators are spending their time so I have MyAssistant send me a list of new estimates. I am also tracking how long it takes to convert estimates to jobs. – Specialty Construction in Florida

**Audit Timberline Office.** MyAssistant sends me a list of new vendors as part of an internal audit. – Specialty Construction in Florida

**Monitor new work.** I'm just trying to stay on top of what's happening with our jobs so I get a list of new contracts, POs and work releases on a weekly basis. – GC in Texas

**Marketing.** We don't want to miss out on work because we are not talking to our customers often enough. I get a list of SM Customers or Sites that have not called in 3 months. We check in to see what we can be doing for them. – Specialty Contractor in New York

**Job Close Out.** As jobs come to a close we are scrambling to get the right paperwork out to the right people at the right time. I send project assistants a notice when the subcontractor invoices 100% so they can send O&M manual and closeouts. – Specialty contractor in Ontario

**Cash flow.** We often carry expenses longer than we need to because we didn't know we were ready to bill. We use MA to track job progress- both % complete and %billed - so our guys are aware of where their jobs are. This also tells me what needs to be invoiced. – Electrical Contractor in New Jersey

**Job Close Out.** We have jobs that hang out there and never get closed. MyAssistant sends me a list of any open jobs that don't have costs in the last 45 days so we can check and see if the job should be closed. – Specialty Construction in Florida

**Job Close Out.** I send a list of jobs that are 80% billed to the responsible person so they know when to start the close-out procedures. – GC in Texas

**Errors in Timberline Office.** I want to catch errors as early as possible to make necessary corrections so I use MyAssistant to find out as soon as anything gets posted to a future accounting period. – Specialty Construction in Florida

**Receivables.** We want to stay on top of customer billings so accounting gets a list of invoices over 30 days old and they call the clients as needed. – GC in Texas

**Process review.** Our PMs can enter commitments, but they don't have security rights to release them to accounting so MyAssistant sends a notice to the senior PM whenever a new commitment is entered so he can review and release. – GC in Texas

**Expiring Leases.** I want to start the renewal process on expiring leases when they are 60 days out so I get a list of expiring leases. – Property Manager in California

**Change Orders.** When we don't get Change Requests back in a timely manner we send an email to the Architect after 3 days as a reminder. – GC in New York

**Building Codes.** Sprinkler tests are required every two years by California State code so I get an email when the tests are coming due. – Property Manager in California

**Invoice Approval.** Invoices need to be returned by the PM within 15 days. If they are not returned we send a “gentle” reminder. – GC in New York

**Report Distribution.** We send reports based on the data folder because different recipients need information for different companies. – Property Management firm in California

**Vendor Insurance.** Send me a report with a list of all subs with expiring insurance. Attach a report with all the letters that need to be sent so I can fax them out. I would email them directly, but many of our subs are lucky to have a fax machine, much less email. – Specialty Contractor in Texas

**Manage Submittals.** Our PM's often work with different Supervisors, but they still need the information about all the jobs that they are working on. MyAssistant sends Submittal Logs by PM and by Superintendent. – GC in Iowa

**Email pay stubs.** We are trying to save money every way we can. We bought MyAssistant to distribute Payroll Direct Deposit notices. – GC in Michigan