



Your Personal Assistant

MyAssistant

MyAssistant for Sage 300 Construction and Real Estate saves you time by proactively monitoring your business and automatically communicating time-sensitive information. MyAssistant distributes reports, statements and documents; lists of items that need attention or Sage information in spreadsheets.

Sage

You tell MyAssistant what to look for and what action to take. It then proactively monitors your Sage data and distributes information to those who need it. For example, MyAssistant improves operations by automatically:

- Identifying subcontractors with insurance expiring in 30 days and sends them a personalized email requesting an updated certificate.
- Looking up who was paid that week and sends each employee their direct deposit pay statement.
- Sending each project manager a cost spreadsheet highlighting the cost, billing, commitment or profit status of their jobs.
- Seeing which AP Vendors received an electronic payment and sending them their pay statement.
- Generating and distributing most of your reports on a regular schedule.
- Communicating when new jobs, vendors, employees, or other information has been entered or changed.
- Alerting someone of missing compliance items or setup information.
- Monitoring billing and payment issues.
- Checking data entry for issues like costs to closed jobs, an incorrect accounting period or the wrong GL account.
- Creating and distributing documents like tenant statements, AR Agings or Lien Waivers.
- Notifying you when Service work orders are completed and not billed.
- Informing you of overdue invoices and remind past-due customers of their delinquency.
- Generating a list of AP invoices that should be paid after a cash receipt.
- Saving reports, documents and spreadsheets to Job, Vendor, Customer, etc. specific folders.



Benefits

- Cost control
- Insurance compliance
- Automated alerts
- Personalized reports
- Human resources
- Subcontractor communication
- Payroll direct deposits
- Electronic payment remittances
- Lease management
- Work orders, purchase orders, and invoices
- Tenant statement distribution
- Receivables
- Setup and processing
- Automated letters
- Workflow integration

My Notifications

| Last Updated | Task Name |
|--------------|--|
| 01/24/2022 | Bank Accounts with balances under specified threshold |
| 12/13/2021 | Change Requests submitted and not approved |
| 12/13/2021 | Submittals not returned in 5 days |
| 12/07/2021 | Pending Invoices out for approval too long |
| 12/07/2021 | Cost Codes over budget by five percent or more |
| 12/07/2021 | Jobs not billed in 40 days |
| 12/07/2021 | Vendors with expiring Worker's Comp. Insurance |
| 12/06/2021 | Send Employee their Direct Deposit Statement |
| 12/06/2021 | Subcontracts without a signed contract |
| 12/06/2021 | PJ Submittals coming due |
| 12/06/2021 | Cost Codes with committed cost greater than the estimate |
| 12/06/2021 | Customers with a balances over \$ 10000 |
| 12/06/2021 | Invoices open for specified number of days |
| 12/06/2021 | Work Orders waiting on parts |
| 12/06/2021 | Work Orders not scheduled |
| 12/06/2021 | RFIs not returned in 5 days |
| 12/06/2021 | AR Invoices older than 30 days |

MyAssistant ×

✓ To Do: 0

< My Notifications

✓ Check For ⚙️

Simple to use and set up

Whether you choose to create your own MyAssistant tasks using a simple wizard or you use one of the 350 prebuilt rules in the product, your options are practically limitless. You can:

- Identify exactly what will be monitored or take place.
- Schedule a task to run at specific times, after the completion of a Sage 300 Construction and Real Estate task, or on demand.
- Designate who will be notified and the information they will receive.

For more information, contact your Sage business partner or customer account manager at 800-858-7095.

MyAssistant can take action for almost any scenario. Use a simple task wizard to tell MyAssistant what you want done. Stay in the know about critical project details, including the most important—profit erosion!

A Sage Partner



✉ info@altavistatech.com

🌐 altavistatech.com

☎ 855.913.3228



©2023 The Sage Group plc or its licensors. All rights reserved. Sage, Sage logos, and Sage product and service names mentioned herein are the trademarks of Sage Global Services Limited or its licensors. All other trademarks are the property of their respective owners.