

Sage 300

Construction and Real Estate

Sage 300 Construction and Real Estate

Formerly Sage Timberline Office

MyAssistant Release Notes

Version 12.1

sage

NOTICE

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New MyAssistant Tasks

To help you quickly automate new processes, Sage 300 MyAssistant 12.1 provides over 35 new prebuilt Tasks.

Vendor / Subcontractor Compliance

- Vendors with insurance expiring (updated existing Task with new insurance types)
- Invoices from vendors with missing or expiring insurance (vendor specific)
- Invoices from vendors with expiring insurance (vendor or commitment specific)
- Invoices selected for payment from vendor's with missing or expiring insurance (vendor or commitment)
- Commitments with expiring insurance (Vendor or Commitment specific)
- Commitments with expiring insurance (vendor or commitment specific)
- Commitments with expiring worker's comp. insurance (updated to monitor vendor and commitment specific insurance)
- Commitments with expiring general liability insurance (updated to monitor vendor and commitment specific insurance)
- Commitments with expiring auto insurance (updated to monitor vendor and commitment specific insurance)
- Send vendors a list of their missing certified reports
- Missing certified reports
- Invoices selected for payment from vendors missing certified reports
- Miscellaneous Compliance items not received
- Miscellaneous compliance items expiring
- Send vendors a list of their missing or expired miscellaneous compliance items

Lien Waiver Control

- AP Invoices from vendors with outstanding lien waivers
- Invoices selected for payment from vendors with missing Lien Waivers
- Lien Waivers not received in 30 days (primary vendors)
- Lien Waivers not received in 30 days (secondary vendors)
- Lien Waivers not received in 30 days from all vendors (primary and secondary)
- Send project managers a list of lien waivers that have not been received
- Send vendors their list of outstanding lien waivers

Vendor Management

- Invoices from the same vendor, for the same amount with different invoice numbers
- Invoices (up-posted) from the same vendor, for the same amount with different invoice numbers
- Send AP Vendors a request for updated contact information
- AP Vendors marked as inactive

Payroll

- Send employees their Pay Statement (Task includes report design)
- Send Direct Deposit Statements for employees without an email address
- Employees without an email address
- Employees with an employment anniversary in the next 14 days
- Send employees request for updated information

Change Management

- Change orders waiting to be approved
- Change Orders that are not marked as billable
- Change orders that have been denied
- Change Orders that have not been submitted for approval
- Commitment Change Orders not linked to a revenue Change Order

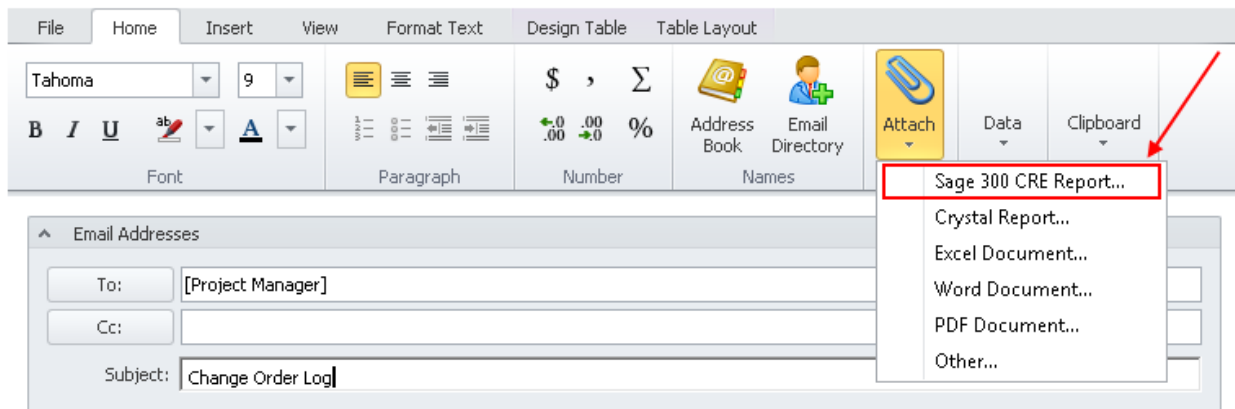
General

- New Sage 300 CRE user has been setup
- Jobs missing a Project Manager email address
- Jobs missing a Superintendent email address

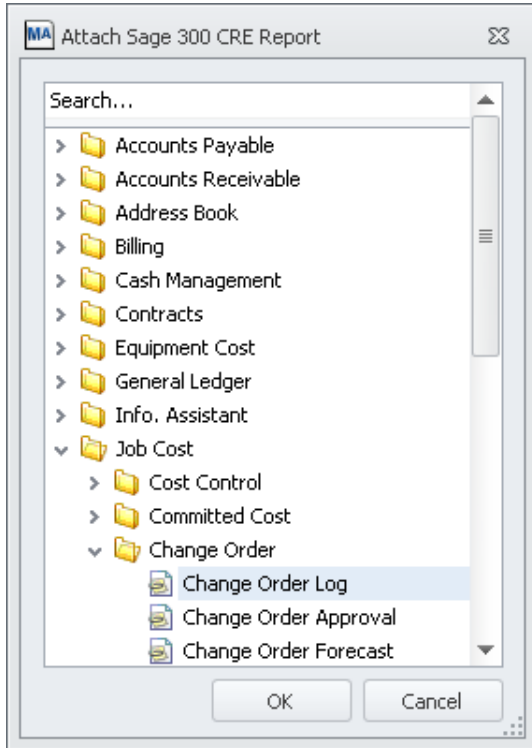
Generate and Send Report Designer reports

Hundreds of Sage 300 CRE (Timberline Office) customers use MyAssistant to generate and distribute reports. Up until now, these reports had to be designed using the Crystal Reports application. With MyAssistant 12.1 you can generate and distribute reports designed with the Sage 300 CRE Report Designer. This allows you to use the hundreds of reports provided with the Sage 300 CRE applications as well as your custom report designs. Generating and sending Sage 300 Report Designer reports is a simple process.

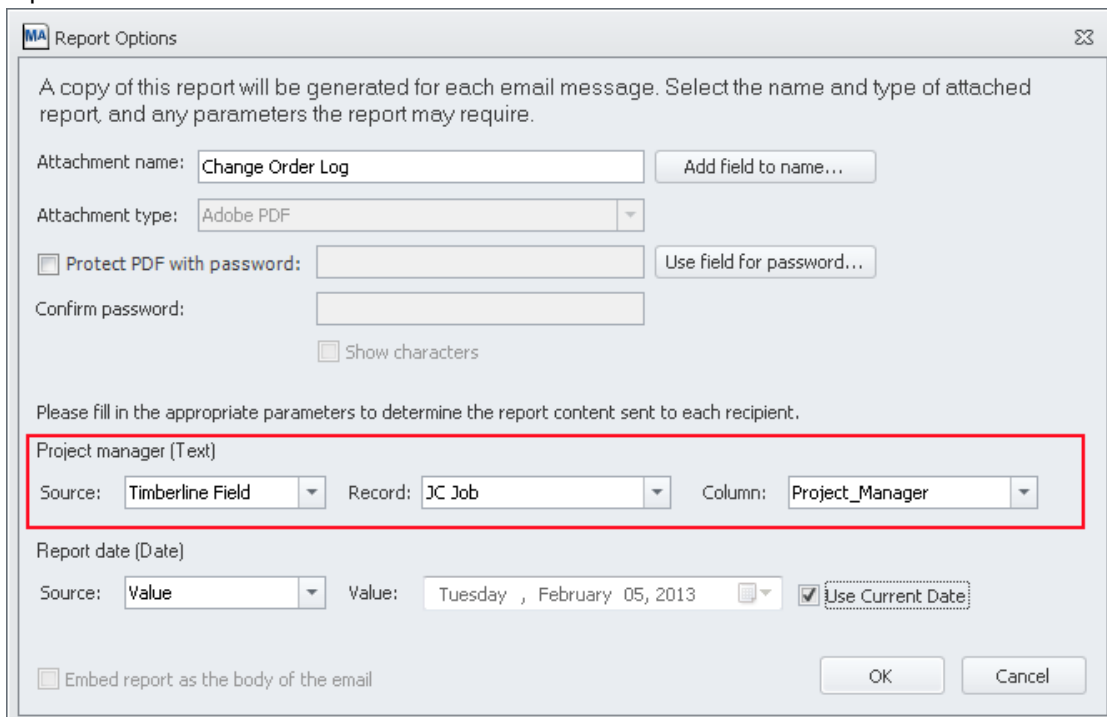
Step 1 -- In defining the email message in a MyAssistant Task, click [**Attach**] and [**Sage 300 CRE Report**].



Step 2 – Select a report from the report list you already use in the Sage 300 CRE software. If you don't remember the name of the report, use the new MyAssistant *search* and the list will be automatically filtered as you type.



Step 3 – MyAssistant will generate a separate report for each email message. In doing so, report prompts can be used to filter the content of the report for each recipient. For example, send each project manager just their information by completing a report prompt with their name. Then use the name to filter the report.



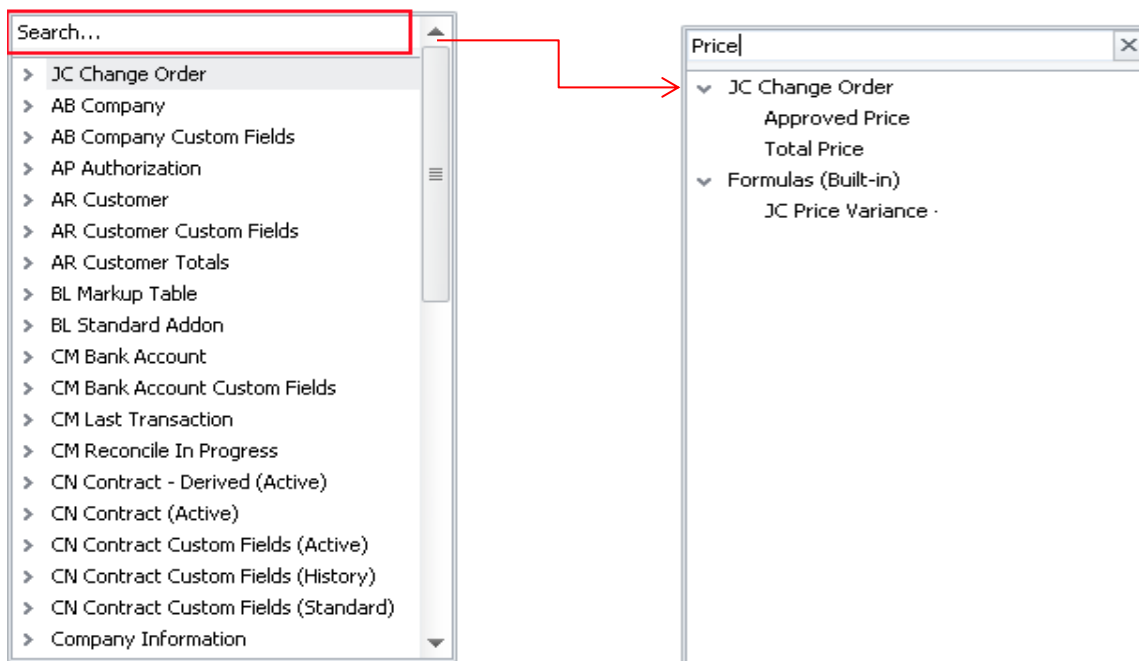
Search

A new search option allows you to easier find information in Sage 300 CRE, MyAssistant conditions, or formulas.

Sage 300 Database Fields

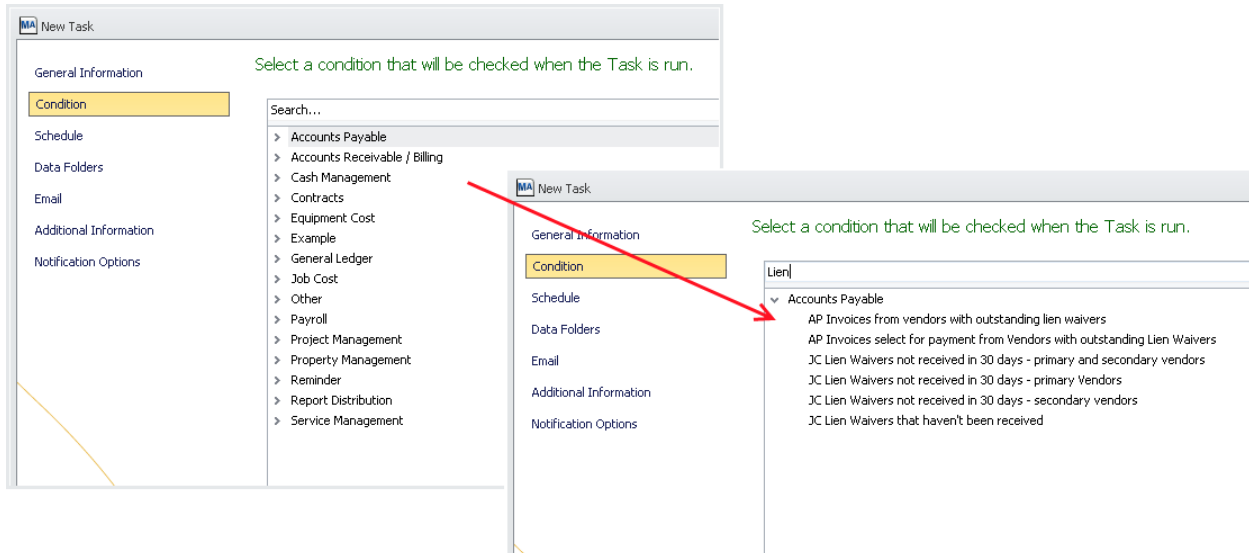
The Sage 300 CRE software can store 1000s of data points making it a very powerful system. However, this power comes with a challenge in remembering where each piece of information is stored. The new Search feature in MyAssistant 12.1 helps solve this problem.

A Search box is now available to help you find the information that you're looking for in the Sage 300 database. For example, let's say that you want to include the Change Order Price in a list of unapproved Change Orders. As you type the word *Price* in the Search box, the list of Sage 300 CRE database fields is filtered to show only those database fields that match the search.



Conditions

Sage 300 MyAssistant 12.1 comes with over 350 Conditions that you can use to monitor your business. To help you find what you need, we've added search to the condition selection process. For example, to see all MyAssistant Conditions associated with Lien Waiver management, enter *Lien* in the search box and the list is filtered accordingly.



New Email Directories

MyAssistant Email Directories can be used to lookup who should be notified and then send them their Notifications or reports. For example, send employees who use direct deposit their pay statement, AP Vendors with insurance or contract issues a letter, or email Tenants their statements.

With Sage 300 CRE 12.1 you can now record email addresses for AP Vendors, employees, Project Managers and other contacts. MyAssistant 12.1 leverages these fields to include the following prebuilt Email Directories:

- AP Vendor Contact 1
- AP Vendor Contact 2
- AP Secondary Vendors
- PR Employee
- JC Project Manager
- JC Superintendent
- SM Employee
- SM Service Site

Enhanced Notification Reporting

Sub-Totals

MyAssistant will now automatically sub-total your Notifications based on your grouping.

Cost Codes over budget

Job	Cost Code	Description	Total Estimate	JTD Cost	Variance
Job: Clackamas Office Park #4					
03-002	12-100	Artwork	0.00	569.00	-569.00
03-002	2-140	Dewatering	4,392.16	5,053.23	-661.07
03-002	3-210	Reinforcing Steel	6,117.31	16,119.67	-10,002.36
03-002	3-220	Welded Wire Fabric	928.01	1,645.65	-717.64
03-002	7-200	Insulation	0.00	16,239.80	-16,239.80
03-002	9-210	Drywall Plaster	0.00	15,500.00	-15,500.00
			11437.48	55127.35	-43689.87
Job: Fort Wayne Officer's Club					
03-003	2-220	Excavate & Backfill	2,508.26	5,325.11	-2,816.85
03-003	2-520	Cement Paving	5,117.52	7,976.81	-2,859.29
03-003	3-130	Permanent Forms	273.00	827.39	-554.39
03-003	6-410	Custom Casework	17,250.00	29,395.00	-12,145.00
			25148.78	43524.31	-18375.53
Job: NW Food Warehouse					
03-001	2-140	Dewatering	99,475.83	100,638.68	-1,162.85
03-001	2-220	Excavate & Backfill	144,540.07	154,157.17	-9,617.10

An option to control whether the Notification list is included in the email message has been added. This allows you to send letters or reports without including a Notification list and still keep a list in MyAssistant for your reference. For example, send vendors with expiring insurance a letter and keep a list of vendors that received a letter in the MyAssistant application.

New Formulas

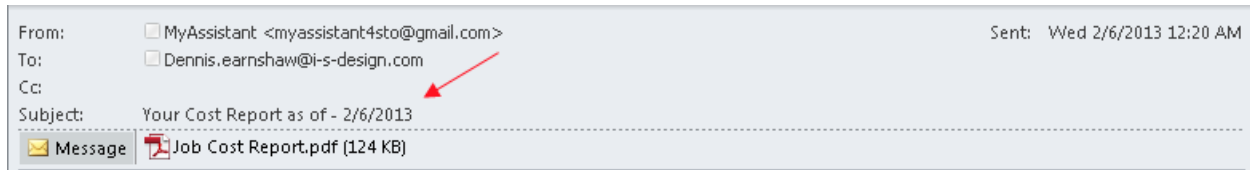
In addition to Sage 300 Construction and Real Estate database columns, you can include formulas in email messages and Notification lists. MyAssistant 12.1 provides additional pre-built formulas.

- Current Date
- Last 4 Digits of Employee Social Security number
- PM Tenant Name
- PM Tenant Address Line 2
- PM Tenant Address City State & Zip
- PR Employee Name Switch
- PR Employee Address Line 2
- PR Employee City State Zip
- AP Vendor Name Switch
- AP Vendor Address Line 2
- AP Vendor City State Zip
- AP Invoice Aging Under 30 Days
- AP Invoice Aging 31 to 60 Days
- AP Invoice Aging 61 to 90 Days
- AP Invoice Aging 91 to 120 Days
- AP Invoice Aging Over 120 Days

- AR Customer Address Line 2
- AR Customer City State Zip
- AR Invoice Aging Under 30 Days
- AR Invoice Aging Under 31 to 60 Days
- AR Invoice Aging Under 61 to 90 Days
- AR Invoice Aging Under 91 to 120 Days
- AR Invoice Aging Over 120 Days
- PR Employee Hire or Rehire date

Include Sage Data in Email Subject Line

When using MyAssistant Email Directories to send each recipient their information, you can now customize the email subject line using Sage 300 CRE data fields or dates. For example, include the current date when reports were generated.



Other examples of how a customized email subject line might be used:

- Monthly Statement for <Tenant Name>
- Your Payroll Statement for week ending <PR Period Ending Date>
- Your Insurance Expiring for Job <Job name>

Monitor and Report on New Data in Sage 300 CRE 12.1

MyAssistant 12.1 is aware of and provides all of the database links to the new data elements added in Sage 300 CRE version 12.1.

See the Sage 300 CRE v12.1 release notes for a complete list of the new database elements added with this release.

Other Changes

A variety of additional changes are included in MyAssistant version 12.1.

- Increase compatibility with MS Outlook 2010 to support selecting contacts from the global address book and the Outlook contact list.
- Remember the Sage 300 CRE Data folder selection when exiting the MyAssistant application.
- Increase the amount of text that can be included in a MyAssistant email message. Email messages can now be 14" wide.
- Wrap column contents in email messages based on the specified column width.
- Increase the size of report attachment passwords to 265 characters.
- Use Formulas to pass a value into a report parameter.
- Re-label 'Browse' feature to "View Data" to better represent its functionality i.e., view the contents of a Sage 300 CRE database field.
- Progress indicator displayed when loading a report attachment when creating MyAssistant Tasks.
- Allow Sage 300 CRE database fields with the same name to be added as columns in the Notification List.

- Automatically confirm the MyAssistant Notification viewer is available in the Sage 300 Desktop upon application start up.
- An upgraded MyAssistant User Guide is now available from the Windows Start menu.

Support and Training

Installation Instructions

See the Sage 300 MyAssistant 12.1 Upgrade Guide for step by step instructions to upgrade your MyAssistant software to this new version.

Telephone Support

When you would like to speak to a customer support analyst directly, call us at 800-551-8307. Telephone support is available Monday through Friday from 6 a.m. to 5 p.m. Pacific Time with the following exceptions:

- Every Thursday from 2 p.m. to 3 p.m. Pacific time (closed for customer support staff meetings)
- Standard United States holidays
- Quarterly company meetings

Sage Customer Portal

You may log on to the Sage Customer Portal at:

<https://customers.sagenorthamerica.com/irj/portal/anonymous/login>.

The portal provides access to the following services:

- Knowledgebase: Find answers to your questions, access downloads, and subscribe to your favorite articles. This service is available online 24/7.
- Live Chat: Chat online with a customer support analyst, a great option for quick questions. Chat hours are Monday through Friday from 6 a.m. to 3 p.m. Pacific Time, with the same exceptions as telephone support.
- Online Support Request: If you have a question or an issue that is not urgent, you can submit an online support ticket. A customer support analyst will contact you during regular telephone support hours.

Training

Sage University

Sage University offers both recorded and live training sessions. Visit SageU.com for currently available and upcoming classes.

How to access MyAssistant training options in Sage University:

1. Enter www.SageU.com in your web address bar.
2. Click [Customer Training] and select your Sage 300 Product from the list.
3. In the page that opens, click [**Product Training**] on the left side of the screen.
4. Click [**MyAssistant**] in the list that opened.
5. Select either [**Realtime Learning**] or [**Replay Learning**] and review the available options in each.

How to access Complimentary MyAssistant Training in Sage University:

1. Enter www.SageU.com in your web address bar.
2. Click [Customer Training] and select your Sage 300 Product from the list.
3. Click [**Complimentary Training**] on the left side of the screen.
4. Review the list of complimentary classes for a MyAssistant option.

MyAssistant YouTube Channel

The MyAssistant YouTube channel offers a variety of MyAssistant training videos. Subscribe to the MyAssistant YouTube channel to be notified when new videos are added.

How to access the MyAssistant YouTube channel:

1. Enter **www.YouTube.com/MyAssistantTraining**
2. The channel will open with all available videos listed.
3. Click on a video to watch.