The following outlines the Sage MyAssistant 20.3 enhancements that can increase productivity.

**Sage MyAssistant 20.3 Highlights:**
- Option to personalize who MyAssistant emails come from
- 19 new pre-configured Tasks, including:
  - Send AR Aging Detail by Job spreadsheets to each project manager
  - New Tasks to send Vendors & Customers miscellaneous communications
  - Generate and send AP Cash Flow spreadsheets
  - Generate and send AP Invoice Register by Job Spreadsheet
- Check for unposted entries in Sage
- Updated AR Aging by Job Spreadsheet
- 7 new MyAssistant Formulas
- Enhanced Payroll Pay Statement reports to run faster
- Fixes to a variety of MyAssistant Conditions

For more information, see page 2.

**Sage MyAssistant 20.1 Highlights:**
- Updated software appearance to be consistent with Microsoft Office 2019
- Simplified toolbars to make commonly used buttons more prevalent
- Automatically create MyAssistant spreadsheet templates from the Notification list
- Easily maintain Tasks attachments with new Attachment Properties
- Update Crystal Reports attached to Tasks without removing & re-adding them
- Password protect attached spreadsheets
- Automatically customize spreadsheet names based on the spreadsheet content
- Use Formulas in MyAssistant Email Directories to send personalized email messages
- Enhance performance with an option to not save Notification lists after emails are sent
- Enhancement supports using email addresses and hyperlinks in email body
- Improved software performance with upgrade to SQL Server 2017

For more information, see page 7.
Sage MyAssistant Version 20.3

Personalize who Sage MyAssistant Emails Come From

Many Sage customers would like to personalize who MyAssistant emails come from, whether they be from different departments or different companies. For example, sending Payroll-related notices from someone in Payroll, sending insurance requests from a contract compliance person, etc.; helps recipients recognize who information is coming from. You can now do this in version 20.3.

Multiple “From” email addresses can be specified in the MyAssistant Server Configuration Manager, with one being the default.

If you would like to send emails for a MyAssistant Task from a specific email address, just open Task Setup and select the desired “From” email address.
Once a “From” email address is specified on a Task, all emails created and sent by that MyAssistant Task will come from the specified email.

New Preconfigured Tasks

The following new Tasks and Task changes are included in Sage MyAssistant 20.3. Any of the now 324 preconfigured Tasks can be used as is or customized to your needs.

- **AR Aging Detail by Job spreadsheet**: Emails project managers or other recipients a spreadsheet that lists aged AR Invoices and Cash Receipts for their Jobs.

  ![AR Aging Detail by Job](image)

- **AP Cash Flow Spreadsheet**: Emails a spreadsheet that lists open AP Invoices, how much is still outstanding, and a week-by-week breakdown of when each invoice is coming due.

  ![AP Cash Flow Spreadsheet](image)

- **AP Invoice Register by Job Spreadsheet**: Emails project managers and/or other recipients a spreadsheet outlining all the open AP Invoices for their Jobs.

  ![AP Invoice Register by Job](image)
- **Vendor Payments by Job Spreadsheet**: Emails a spreadsheet to project managers showing the recent payments made to vendor invoices for work done on their Jobs, including how the vendor was paid.

  ![AP Invoice Register by Job](image)

- **JC Job Overview and Cost Entries Spreadsheet**: Send each Project Manager a spreadsheet providing a job overview and a list of costs on their Jobs in the last specified days.

  ![AP Vendor Payments by Job](image)

- **Invoices entered to JC Cost Code without an estimate**: Looks through all AP Invoices and produces a list where an Invoice Distribution coded to a JC Cost Code that doesn’t have an estimate.

  ![Cost Entries by Job](image)
- AP Checks Issued in the Last Specified Days: Send a list of all AP Checks that have been issued in a specified number of days

- Send Vendors an Email: Automate miscellaneous vendor communications by sending an email to specified AP Vendors who have an email address entered in Sage

- Send Customers an Email: Send miscellaneous Customer communications

- CM and GL Balances not reconciled: Emails a list of Bank Accounts where the Posted CM Balance, the CM Derived Posted Balance and/or the CM General Cash Account balance don’t match

- JC Jobs to be closed: Looks through Job Cost and emails a list of Jobs with a status of “In Progress” but no costs in the last 365 days

- AP Invoices with payment dates in the next 7 days: Looks through Accounts Payable and produces a list of AP Invoices whose “Payment Date” is in the next week

- AP Invoices not fully paid: Produces a list of all AP invoices that are not fully paid

- 6 new MyAssistant Tasks that check for items that haven’t been posted – each checking a different Sage application:
  - Accounts Payable
  - Accounts Receivable
  - Equipment Cost
  - General Ledger
  - Job Cost
  - Payroll

See Appendix A for a complete list of preconfigured Sage MyAssistant Tasks.

Enhanced “Payroll Employee Pay Statement” reports

MyAssistant’s default reports for sending employees their pay statements have been enhanced to run faster in version 20.3. The newest versions of the reports can be found in the Sage Knowledgebase online, or from your local consultant or business partner.

New MyAssistant Formulas

Seven prebuilt MyAssistant formulas have been added to version 20.3, and can be used for purposes like date prompts on an attached report, filling out personal information in a form letter in the body of an email, and/or naming a new folder that will be created when saving an attached report to a location on disk.
Updated Conditions

The following MyAssistant Task Conditions were updated in version 20.3:

- AP Invoices (posted) with a duplicate invoice based on vendor ID and invoice amount
  - Now checks that both duplicate invoices were in the same time frame
- AP Payments made for jobs in the last 30 days
  - Now looks back the correct number of days by default
- AR invoices with an open balance (job related)
  - Updated to consider retainage released when determining open invoices
- CN Contracts billing retainage and pending Change Requests exist in PJ
  - Fixed typo in Condition Expression
- JC Commitments with expiring insurance (vendor or commitment specific)
  - Now looks for all insurance types looking for expiration dates in the next 30 days
- JC Open Commitments that have not been invoiced this month
  - Updated to run faster
- PR Checks (posted) that use Direct Deposit for Employees with no Email Address
  - Fixed typo in Condition Expression
- PR Checks (posted) that use direct deposit
  - Excludes voided checks
- PR Employees whose birthday is next month
  - Now excludes terminated employees
- PR Employees whose employment anniversary is today
  - Now checks rehire employment anniversaries when applicable
- PR Employees with an Employment Anniversary in the Next 14 Days
  - Now checks rehire employment anniversaries when applicable
- PR Employees with employment anniversaries next month
  - Now excludes terminated employees
- CM Banks with Balances less than invoices selected for payment
  - Updated to run faster
Sage MyAssistant Version 20.1

The following outlines the Sage MyAssistant 20.1 enhancements and changes

MyAssistant 20.1 Highlights:

▪ Updated software appearance to be consistent with Microsoft Office 2019
▪ Simplified toolbars to make commonly used buttons more prevalent
▪ Automatically create MyAssistant spreadsheet templates from the Notification list
▪ Easily maintain Tasks attachments with new Attachment Properties
▪ Update Crystal Reports attached to Tasks without removing & re-adding them
▪ Password protect attached spreadsheets
▪ Automatically customize spreadsheet names based on the spreadsheet content
▪ Use Formulas in MyAssistant Email Directories to send personalized email messages
▪ Enhance performance with an option to not save Notification lists after emails are sent
▪ Enhancement supports using email addresses and hyperlinks in email body
▪ Improved software performance with upgrade to SQL Server 2017

Updated software appearance

The appearance MyAssistant 20.1 has been updated to be more consistent with the style of current Microsoft Office products. This change helps Customers become comfortable with MyAssistant more quickly.
Streamlined toolbars

Toolbars in MyAssistant have been updated to make the more commonly used buttons easier than ever to find and use. This helps customers more quickly find what they need and achieve their goals when working with the MyAssistant software.

New Way to Create MyAssistant Spreadsheets

With MyAssistant 20.1 you can turn lists that are sent in the body of an email into spreadsheets. This new option lets you quickly build spreadsheet templates by adding the Sage fields to the Notification list and then clicking “Spreadsheet Template”, then “Use Notification List”:
When you click “Use Notification List”, the MyAssistant Spreadsheet Designer opens with a template that matches the Notification List:

After you’ve made any desired changes, click Save & Close to add it to the Task.

More easily maintain Task attachments with new “Attachment Properties”

More quickly track down/make needed changes to reports or spreadsheets attached to MyAssistant Tasks; simply by right-clicking on an attachment in the Email Step of Task Setup.
The new “Attachment Properties” offer a number of different options:

- **Save As**: Lets customers save a copy of an attached Crystal Report design or Spreadsheet Template on their computer. This is especially useful when there’s a need to update the design of an attached Crystal report and the original cannot be found.

- **Properties**: Provides information about the selected attachment including the kind of attachment (e.g. Crystal Report, Sage Report, Spreadsheet Template, etc.), the size on disk of the attachment, and the file path of where it was attached from (if applicable).

- **Refresh**: This is used to update an attached Crystal Report without having to remove, re-attach and entering the report options.

**MyAssistant Spreadsheet Security**

Customers continue to use MyAssistant to email Sage information in an Excel spreadsheet, and a common request is to secure who could open spreadsheets and/or edit their content. MyAssistant 20.1 now allows requiring passwords for opening an attached spreadsheet or editing its contents.

Passwords are added to spreadsheets in the Spreadsheet Template Designer in Task Setup: Just click “Protect Spreadsheet” on the “Review” tab to add:
Personalizing attached spreadsheet names

MyAssistant spreadsheet names can be automatically customized with Sage information (e.g. job numbers, Vendor or customer names, etc.). This is especially useful when multiple spreadsheets are being generated (e.g. creating a separate spreadsheet for each of a Project Manager’s Jobs).

Formulas in Email Directories

Customers can now use MyAssistant Formulas in Email Directories to look up email addresses in locations normally not accessible. For example, a formula can be created to retrieve the email address of the Project Manager on a PJ Job Contact List when sending a list of Jobs with unapproved change orders. Also, a formula could be used to retrieve the desired email address to send SM Invoices.

Remove Notifications after emails send to keep MyAssistant organized

MyAssistant now provides the option to automatically remove Notifications from the MyAssistant database any related emails are sent. This is useful in cases where a Task creates a large number of Notifications, but the Notifications are no longer needed once the email is sent. Using this option helps keep the MyAssistant database running efficiently and minimizing the resources used on your server.

Efficiently add email addresses and website hyperlinks to MyAssistant emails

MyAssistant 20.1 was updated to allow email addresses and website hyperlinks to be copied and pasted directly into the email message in the Email step of Task Setup. This is useful when customers want to add their email signatures to MyAssistant emails and keep the same formatting that appears in other emails.

Improved MyAssistant performance with SQL Server 2017

Upgrading from a previous version of MyAssistant to version 20.1 includes upgrading the SQL Server Express database MyAssistant uses to SQL Server 2017. This upgrade improves the overall performance of MyAssistant.
Sage MyAssistant Preconfigured Tasks

**Accounts Payable**

- AP Cash Flow Spreadsheet
- AP Invoice Register by Job Spreadsheet
- AP Invoices Not Fully Paid
- AP Invoices with Payment Dates in the next 7 days
- Banks with insufficient cash
- Checks issued in the last specified days
- Commitments with unsigned change orders and are selected to be paid
- Companies with Invoices not posted in Accounts Payable
- Invoices (un-posted) from the same vendor, for the same amount with different invoice numbers
- Invoices above a threshold without a PO
- Invoices coded to a future accounting date
- Invoices coded to a summary vendor in the last X days
- Invoices entered to JC Categories without an estimate
- Invoices entered to JC Cost Codes without an estimate
- Invoices entered to Jobs without an estimate
- Invoices from the same vendor, for the same amount with different invoice numbers
- Invoices from vendors with missing or expiring insurance (vendor or commitment specific)
- Invoices from vendors with missing or expiring insurance (vendor specific)
- Invoices from vendors with outstanding Lien Waivers
- Invoices missing a PO or Subcontract
- Invoices missing retainage
- Invoices open for specified number of days
- Invoices over threshold
- Invoices paid with a credit card in the last 15 days
- Invoices posted beyond the current 1099 Year
- Invoices posted to a closed job
- Invoices posted to closed commitments
- Invoices posted to Commitments that are not committed to JC
- Invoices selected for payment from vendors missing certified reports
- Invoices selected for payment from vendor’s with expiring insurance (vendor or commitment)
- Invoices selected for payment from vendors with missing lien waivers
- Invoices that are on hold
- Invoices with an open balance sorted by Job (Spreadsheet Attached)
- Invoices with expiring discounts
- Lien waivers not received in 30 days from all vendors
- Lien Waivers not received in 30 days from primary vendors
- Lien waivers not received in 30 days from secondary vendors
- Miscellaneous compliance items expiring
- Miscellaneous compliance items not received
- Missing certified reports
- Open Commitments that have not been invoiced this month
<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Invoices for jobs that have received a cash receipt in the last X days</td>
<td></td>
</tr>
<tr>
<td>Open Invoices from subcontractors who do not have a contract</td>
<td></td>
</tr>
<tr>
<td>Payments for job related costs made the last 30 days</td>
<td></td>
</tr>
<tr>
<td>Pending Invoices out for approval too long</td>
<td></td>
</tr>
<tr>
<td>Send a letter to Vendors with expiring insurance</td>
<td></td>
</tr>
<tr>
<td>Send Direct Deposit statements to Vendors</td>
<td></td>
</tr>
<tr>
<td>Send project managers a list of lien waivers that have not been received</td>
<td></td>
</tr>
<tr>
<td>Send vendors a list of certified reports that have not been received</td>
<td></td>
</tr>
<tr>
<td>Send vendors a list of their missing or expired miscellaneous compliance items</td>
<td></td>
</tr>
<tr>
<td>Send vendors a request for updated contact information</td>
<td></td>
</tr>
<tr>
<td>Send Vendors an Email</td>
<td></td>
</tr>
<tr>
<td>Send Vendors their Electronic Payment Statement (Report Attached)</td>
<td></td>
</tr>
<tr>
<td>Send vendors their list of outstanding lien waivers</td>
<td></td>
</tr>
<tr>
<td>Vendor Contacts without an email address</td>
<td></td>
</tr>
<tr>
<td>Vendor Insurance Call List (Spreadsheet Attached)</td>
<td></td>
</tr>
<tr>
<td>Vendor List</td>
<td></td>
</tr>
<tr>
<td>Vendor Payments by Job Spreadsheet</td>
<td></td>
</tr>
<tr>
<td>Vendors marked inactive</td>
<td></td>
</tr>
<tr>
<td>Vendors missing 1099 information</td>
<td></td>
</tr>
<tr>
<td>Vendors missing a Recipient Tax ID</td>
<td></td>
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<tr>
<td>Vendors missing address information</td>
<td></td>
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<tr>
<td>Vendors on Hold</td>
<td></td>
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<tr>
<td>Vendors recently setup in Sage Accounts Payable</td>
<td></td>
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<tr>
<td>Vendors scheduled for payment that may need a joint check</td>
<td></td>
</tr>
<tr>
<td>Vendors who have not been paid in specified number of days</td>
<td></td>
</tr>
<tr>
<td>Vendors whose address information has been changed</td>
<td></td>
</tr>
<tr>
<td>Vendors whose banking information has changed</td>
<td></td>
</tr>
<tr>
<td>Vendors with a credit memo not selected for payment</td>
<td></td>
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<tr>
<td>Vendors with expiring General Liability Insurance</td>
<td></td>
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<tr>
<td>Vendors with expiring insurance</td>
<td></td>
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<tr>
<td>Vendors with expiring Worker’s Comp. Insurance</td>
<td></td>
</tr>
<tr>
<td>Vendors with no invoices in the last three years and marked as active</td>
<td></td>
</tr>
<tr>
<td>Vendors with open invoices or commitments and expiring insurance</td>
<td></td>
</tr>
<tr>
<td>Vendors with open invoices totaling above threshold</td>
<td></td>
</tr>
</tbody>
</table>

**AR and Billing**

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AR Aging Detail by Job Spreadsheet</td>
<td></td>
</tr>
<tr>
<td>AR Invoices for Customers over their credit limit</td>
<td></td>
</tr>
<tr>
<td>AR Invoices issued X number of days ago</td>
<td></td>
</tr>
<tr>
<td>AR Invoices older than a specified number of days</td>
<td></td>
</tr>
<tr>
<td>AR Invoices with future Accounting Dates</td>
<td></td>
</tr>
<tr>
<td>Cash receipts for the current year</td>
<td></td>
</tr>
<tr>
<td>Cash receipts received in the last specified days</td>
<td></td>
</tr>
<tr>
<td>Companies with items not posted in Accounts Receivable</td>
<td></td>
</tr>
</tbody>
</table>
Contracts billing retainage and pending Change Requests exist
Contracts not billed in 40 days
Contracts where work is complete but not fully billed
Contracts with open receivable balances over a specified amount
Customer Contact list
Customers exceeding their credit limit
Customers exempt from finance charge
Customers missing a "Days before due" value
Customers missing an email address
Customers recently setup in Accounts Receivable
Customers with a balance over $10000
Customers with balances older than 45 days
Customers with no Credit Limit entered
Invoices coming due in a specified number of days
Jobs billing retainage and pending Change Requests exist
Jobs losing their lien rights
Jobs marked as closed and the total billed is not equal to the revised contract amount
Jobs not billed in 40 days
Jobs not billed in specified days with costs since the last billing
Jobs with open receivable balances over specified days
Jobs with receivable balances above $ 10,000
Jobs with unbilled WIP older than specified number of days
Send AR Aging by Job Spreadsheet
Send Billing Worksheet
Send Customers an Email
Send Customers their Statements (Report Attached)
Send Invoice Verification
Send Invoices

**Cash Management**
Bank Accounts that need to be reconciled
Bank Accounts with balances under specified threshold
Bank Accounts without a security operator
Bank balances that decreased too much yesterday
Bank balances that increased too much yesterday
Checks greater than a specified amount
Checks greater than Max Check Amount
CM Bank Accounts and GL Balances not reconciled
Withdrawal transactions requiring attention

**Equipment Cost**
Companies with items not posted in Equipment Cost
Equipment in need of maintenance
Equipment Licenses expiring
Equipment rented to be returned soon
| Equipment under-utilized last month |
| Equipment with cost is too high compared to revenue |
| Equipment with no cost this month |
| Equipment with no revenue this month |

**General**

New Sage 300 CRE user added

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**General Ledger**

Accounts with a balance under threshold
Accounts with balance above threshold
Accounts with Prior Year Adjustments
Companies with items not posted in General Ledger
General Ledger (continued)
Company records (GL) with no record-security operator set
Invalid entries to control accounts
Suspense Accounts with a balance

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**Job Cost**

Categories over budget by a specified percent
Categories that are over budget by specified amount
Change Orders released to accounting, not updated in Contracts
Change orders that are not marked as billable
Change orders that have been denied
Change orders that have not been submitted for approval
Change orders waiting to be approved
Commitment change orders not linked to a revenue change order
Commitment COs not linked to a Change Order
Commitments committed today
Commitments where the total invoiced exceeds the revised commitment amount
Commitments with expiring Auto insurance
Commitments with expiring General Liability insurance
Commitments with expiring insurance (Vendor or Commitment specific)
Commitments with expiring umbrella insurance
Commitments with expiring worker's comp. insurance
Commitments with Retainage-only balances over 30 days old
Companies with items not posted in Job Cost
Contracts released to accounting
Contracts where all items don't have the same Billing Type
Contracts where items do not have the same Customer
Contracts where items do not have the same Format
Contracts where items do not have the same Job
Contracts with costs and checklist items not checked
Cost Codes over budget
Cost Codes over budget by a specified percent
Cost Codes over budget on labor dollars (includes unposted payroll)
Cost Codes with committed cost greater than the estimate
Cost Codes with costs in the last seven days
Cost Entries by Job in the Last X Days (Spreadsheet Attached)
Cost Transactions from the last seven days
Cost Transactions posted after the Job's Completion Date
Group Cost Codes without a scheduled value
JC Cost Codes that are over budget based on percent complete
JC Jobs to be closed
Jobs list with contact information
Jobs missing a project manager email address
Jobs missing a Superintendent email address
Jobs missing a Worker's Comp group
Jobs over budget
Jobs over budget by a specified percent
Jobs where a GL Prefix has not been entered
Jobs where a Payroll Local has not been entered
Jobs where a Payroll state has not been entered
Jobs where a Payroll WC group has not been entered
Jobs where a retainage reduction might be needed
Jobs where Committed costs are greater than the Estimate
Jobs where costs have not been posted in 45 days
Jobs where projected profit is less than 5%
Jobs where the percent of budget used exceeds the percent billed
Jobs where work is complete and not fully billed
Jobs with a completion date one year ago and not closed
Jobs with labor costs last week
Jobs with missing change requests
Jobs with overtime payroll in the last X days
Jobs without costs in the last 90 days
Jobs without record-security setup
New Jobs that have been entered
Send Cost Breakdown spreadsheet
Send Cost to Complete spreadsheet to project managers
Send WIP Spreadsheet
Started jobs that do not have an estimate
Started jobs without a contract amount
Subcontracts / POs entered to a cost code without an estimate
Subcontracts and PO's entered at least 14 days ago and are not committed to JC
Subcontracts and POs released to Acct but not committed
Subcontracts where retainage held is greater than the amount that should be retained
Subcontracts without a signed contract

Payroll

Companies with time entries not posted in Payroll
<table>
<thead>
<tr>
<th>Employee Contact List</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Deductions being missed this week</td>
</tr>
<tr>
<td>Employee records without an email address</td>
</tr>
<tr>
<td>Employee without a specified deduction</td>
</tr>
<tr>
<td>Employees missing a Worker's Compensation code</td>
</tr>
<tr>
<td>Employees terminated in the last 14 days</td>
</tr>
<tr>
<td>Employees who are becoming eligible for benefits</td>
</tr>
<tr>
<td>Employees who have been employed between 90 and 120 days</td>
</tr>
<tr>
<td>Employees who have reached a deduction limit</td>
</tr>
<tr>
<td>Employees who have used more vacation time than they have accrued</td>
</tr>
<tr>
<td>Employees whose address information has been changed</td>
</tr>
<tr>
<td>Employees whose birthday is today</td>
</tr>
<tr>
<td>Employees whose employment anniversary is today</td>
</tr>
<tr>
<td>Employees whose pay rates have changed</td>
</tr>
<tr>
<td>Employees with a birthday next month</td>
</tr>
<tr>
<td>Employees with an employment anniversary in the next 14 days</td>
</tr>
<tr>
<td>Employees with employment anniversaries next month</td>
</tr>
<tr>
<td>Employees with less than X regular hours worked in current pay period</td>
</tr>
<tr>
<td>Employees with no WC State set up</td>
</tr>
<tr>
<td>Employees with Overtime (not posted)</td>
</tr>
<tr>
<td>Employees with Payroll time entered last week, but not this week</td>
</tr>
<tr>
<td>Employees with same Social Security #</td>
</tr>
<tr>
<td>Employees with too many hours in current pay period</td>
</tr>
<tr>
<td>Employees without a birthday set up</td>
</tr>
<tr>
<td>Employees without a phone number entered</td>
</tr>
<tr>
<td>Employees without a specified pay setup</td>
</tr>
<tr>
<td>Employees without specified Fringes</td>
</tr>
<tr>
<td>Jobs with Payroll time entered last week, but not this week</td>
</tr>
<tr>
<td>Salaried Employees with no Employee Pay records set to Auto</td>
</tr>
<tr>
<td>Send a welcome letter to salary employees hired in the last 7 days</td>
</tr>
<tr>
<td>Send direct deposit Statements for employees without an email address</td>
</tr>
<tr>
<td>Send Employee their direct deposit notice (unposted)</td>
</tr>
<tr>
<td>Send employees request for updated information</td>
</tr>
<tr>
<td>Send employees their pay statements (Master file-based report attached)</td>
</tr>
<tr>
<td>Send employees their pay statements (report attached)</td>
</tr>
<tr>
<td>Time coded to JC Categories without an estimate</td>
</tr>
<tr>
<td>Time coded to Jobs where the work state &amp; employee home state differ (no reciprocity agreement)</td>
</tr>
<tr>
<td>Time coded to Jobs with no estimate</td>
</tr>
<tr>
<td>Union Local records expiring soon</td>
</tr>
<tr>
<td>Unposted PR Checks greater than $ 2,500</td>
</tr>
<tr>
<td>Unposted Time coded to a closed job</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Project Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved commitment change orders not linked to a revenue change order</td>
</tr>
<tr>
<td>Change Orders not released to accounting</td>
</tr>
</tbody>
</table>
Change Requests needing a response in 4 days
Change Requests submitted and not approved
Change Requests where estimated cost is greater than the price
Commitment Change Orders not released to accounting
Commitment Change Orders release to accounting but have not updated the contract
Correspondence Items waiting response
Current drawings and drawing revisions
Drawings not sent to the Superintendent
Field Reports filed in the last 7 days with Extras
Field Reports with an accident reported yesterday
Incomplete submittals coming up on required finish date
Internal budget change over $ 2,500
Jobs missing a Daily Report
Jobs that have not been released to accounting
Jobs with internal budget changes more than $ 5,000
Jobs with too many open Change Requests
Jobs without a specified contact on Job Contact List
Meeting Minutes not sent to a specified project Role
Open correspondence item requiring action
Past due Meeting Minutes Items
PJ Jobs with too many open RFIs
PJ Submittals coming due
RFI Log (Spreadsheet Attached)
RFIs answered in the last X days
RFIs not returned in 5 days
RFIs not sent to Superintendent
Submittals not forwarded in 4 Days
Submittals not returned in 5 days
Submittals not sent to a specified project Role
Submittals without enough copies received
Transmittals not sent to the Superintendent
Unapproved Change Requests
Unapproved Change Requests where work is completed
Vendor quotes needed for Change Requests

Reminders
Print Quarterly Reports

Report Distribution
Send a Report
Send customers their reports
Send Project Managers their reports
Send vendors their reports

Service Management
<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active Leads not contacted in specified days</td>
<td></td>
</tr>
<tr>
<td>Agreement Quotes expiring in the next 30 days</td>
<td></td>
</tr>
<tr>
<td>Agreement Renewal Spreadsheet</td>
<td></td>
</tr>
<tr>
<td>Agreements expiring in the next 30 days or in the last 120 days</td>
<td></td>
</tr>
<tr>
<td>Agreements that expired in the last 30 days and were not renewed</td>
<td></td>
</tr>
<tr>
<td>Agreements that have expired in the last 30 days with an unbilled balance</td>
<td></td>
</tr>
<tr>
<td>Customers who have not purchased an agreement in 12 months</td>
<td></td>
</tr>
<tr>
<td>Employees not set up to send time to Payroll</td>
<td></td>
</tr>
<tr>
<td>Employees set to send time to payroll and missing needed settings</td>
<td></td>
</tr>
<tr>
<td>Invoices ready to be sent</td>
<td></td>
</tr>
<tr>
<td>Parts needed for PM tasks scheduled for the next month</td>
<td></td>
</tr>
<tr>
<td>Parts where the quantity on hand is less than the minimum stock quantity</td>
<td></td>
</tr>
<tr>
<td>Parts with a negative quantity on hand</td>
<td></td>
</tr>
<tr>
<td>Purchase Order Items where the quantity received is less than the quantity invoiced</td>
<td></td>
</tr>
<tr>
<td>Purchase Order Items where the quantity received is less than the quantity ordered</td>
<td></td>
</tr>
<tr>
<td>Purchase Order Items without receipts after the date promised</td>
<td></td>
</tr>
<tr>
<td>Purchase Orders for Work Orders with no receipts after 20 days</td>
<td></td>
</tr>
<tr>
<td>Purchase Orders linked to a Work Order and are backordered</td>
<td></td>
</tr>
<tr>
<td>Purchase Orders ready to be sent to Vendors</td>
<td></td>
</tr>
<tr>
<td>Service Sites missing a sales person</td>
<td></td>
</tr>
<tr>
<td>Service Sites that have been newly added</td>
<td></td>
</tr>
<tr>
<td>Vehicles due for an oil change</td>
<td></td>
</tr>
<tr>
<td>Work Orders completed and not billed</td>
<td></td>
</tr>
<tr>
<td>Work Orders completed this week</td>
<td></td>
</tr>
<tr>
<td>Work Orders entered today that have a specified Problem code</td>
<td></td>
</tr>
<tr>
<td>Work Orders entered yesterday and assigned as Urgent or High priority</td>
<td></td>
</tr>
<tr>
<td>Work Orders invoiced in the last 5 days</td>
<td></td>
</tr>
<tr>
<td>Work Orders missing a sales person</td>
<td></td>
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<tr>
<td>Work Orders not scheduled</td>
<td></td>
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<tr>
<td>Work Orders Quotes that expired in the last 7 days</td>
<td></td>
</tr>
<tr>
<td>Work Orders that have been canceled and have an open PO</td>
<td></td>
</tr>
<tr>
<td>Work Orders that have been completed and not billed</td>
<td></td>
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<tr>
<td>Work Orders that have not been assigned to a technician</td>
<td></td>
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<tr>
<td>Work Orders waiting on parts</td>
<td></td>
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<tr>
<td>Work Orders with costs and flagged as non-billable</td>
<td></td>
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<tr>
<td>Work Orders without a job number</td>
<td></td>
</tr>
<tr>
<td>Work Orders without a PO number</td>
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</tbody>
</table>

MyAssistant 20.3 and 20.1 Release Notes