MyAssistant
For Sage Timberline Office

MyAssistant saves time and reduces errors for residential developer

Clark Realty, a subsidiary of Clark Enterprises, Inc, performs residential construction, development, and property management. Jen Barlow, Clark Builders' Finance Director, implemented MyAssistant in the summer of 2008 and has over 30 MyAssistant Tasks activated. She reports:

"The most important thing for me is the ability of MyAssistant to find errors ahead of time. By having MyAssistant automatically email us as soon as an error occurs we can correct mistakes right away, so at the end of the month the accounting team is not wasting their time cleaning things up in Timberline. For instance, we can correct transactions that went to the wrong job, or reclassify items through journal entries."

"We have an elaborate cost code system, so now we know if it's not followed correctly. We also know right away if any costs such as invoices are posted to a closed job. And everyone can know if or when a new phase has been setup for a job. We have several GL accounts that we don't want entries posted to, and MyAssistant will alert us if they receive an entry so we can go in and correct it. We also just setup a task to let us know which bank accounts have not been reconciled, so we know what needs to be changed."

"We have a fair number of what we consider basic reports too. For example, we want to know when a particular cost code has over $100,000 in costs."

"We also use MyAssistant's reminder function—it's nice to automatically get reminders to multiple people at once, automatically, in a single email. That's not something that you can dismiss like an Outlook reminder."

"MyAssistant has been very helpful in our standardization efforts. It's very useful to have the information the second something goes wrong or is setup, as opposed to data remaining incorrect and causing problems. Just this morning we learned of an invoice that was entered incorrectly and we were able to correct it at once. We also realized the entry was made by a new employee and were able to provide more attention and training to her."

MyAssistant can also support Clark as they expand their usage of Sage Timberline Office: "We keep adding functionality to Timberline, and as that happens we also expand MyAssistant to help manage and oversee the functionality we're using in Timberline."

"The time savings provided by MyAssistant is really important. We used to spend so much time at the end of the month cleaning up mistakes, but now MyAssistant lets us know right away when an incorrect entry is made. For example, it's much faster to go to Change Invoices versus doing reclassification after the month is closed."

"It's an exceptional reporting tool. We can get information sent to multiple people as soon as something important to our business occurs instead of someone bringing it to my attention later or having it slip through the cracks. I like how much time it saves us by delivering information immediately and automatically, as opposed to learning about it later when it's more difficult to take action."

CUSTOMER
Clark Realty

INDUSTRY
Residential Construction, Management, and Development

LOCATION
Arlington, VA

INNOVATIVE SOFTWARE DESIGN
Founded in 2004, Innovative Software Design provides products and services that extend the power of Sage Timberline Office. The people behind ISD have more than sixty years of experience at Sage Timberline and are inspired by creating innovative solutions that help businesses be more productive.

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