

# MyAssistant

For Sage Timberline Office

## CUSTOMER SUCCESS STORY



## MyAssistant helps GC streamline processes and reduce errors

Founded over 40 years ago, GLY Construction has grown into the largest regional general contractor in the Puget Sound region, achieving over \$500 million in revenue in 2008. Rick Shanti, GLY's IT Manager, considered MyAssistant to help with reconciliation and other processes:

"We did a lot of reconciliation or checking things in Timberline via report; printing out lots of paper just for the staff to look at and say we're in balance. That seemed to be a wasteful way to do things, not just due to the paper but also time, because people actually have to take the time to look at those reports. I looked at MyAssistant as an opportunity to streamline some of those processes and also make them electronic as opposed to paper based."

MyAssistant was implemented by GLY in 2006. Rick reports:

"The most important thing that MyAssistant brings to my job is the ability to provide value to the financial department and help them streamline their processes."

"We use MyAssistant to help reconcile job records to transaction records. We look at the totals on the job record, extra record, cost code record, category record, and transaction record. If any of those are out of balance, MyAssistant tells us. We can then go in and make an adjustment to get those out of balance conditions corrected. It doesn't happen a lot anymore, but when we first started with Timberline [early '90s] out of balance conditions happened quite frequently. It's a process we've had in place for years and the reporting process we used chewed up a lot of paper that didn't need to be chewed up. Now with MyAssistant we have an email notification that lets the accounting staff know an out of balance condition exists. This provides them with the information they need without spending extra time (and paper) looking at data that is in balance."

"We also have MyAssistant help with payroll setup and processing. Among other things, we check all employee setups for missing social security numbers, incorrect work state, and incorrect worker's comp codes. We also check time records during payroll processing for employees with an excess of overtime hours and for salaried individuals that don't have exactly 40 hours. MyAssistant automatically notifies us if any of those conditions occur."

"Additionally we use MyAssistant to look for incorrect setup information in job cost. For example, we use a specific general ledger account for our job cost transactions, and we want to make sure that account is setup on our job records whenever we setup a new job."

"In the future, I'm looking to compare AP transaction totals to GL posting totals to make sure our AP is in balance with our GL. There's a lot more we can automate with MyAssistant. I'm going to go through the public formulas in our Timberline custom reports and find what we can automate and make electronic with MyAssistant."

"From the company's perspective, GLY markets itself as a green company. We strive to maintain those ideals and are dedicated to LEED [Leadership in Energy and Environmental Design (LEED) Green Building Rating System]. A lot of that has to do with going paperless, and MyAssistant is allowing us to move in that direction in areas we were unable to before."

"MyAssistant is a great tool that sends notifications to users based on criteria specific to your company. It allows you to quickly and easily compare specific data and automatically provides notification of data that needs further review. Overall, the product provides GLY an excellent tool to double check Timberline with."

**CUSTOMER**  
GLY Construction

**INDUSTRY**  
General Contractor

**LOCATION**  
Bellevue, WA

**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.