

# MyAssistant

For Sage Timberline Office

## CUSTOMER SUCCESS STORY



## MyAssistant automatically delivers important information in real time

Keystone Property Group was founded in the early 90's, eventually growing into a vertically integrated real estate organization that acquires, develops, and manages commercial real estate in the office, flex, and industrial sectors. Stefanie Hill has held a variety of roles since joining the company in 1996 and, after evaluating MyAssistant, began using it in 2008. She reports:

"I had been to a couple of Timberline conferences and was introduced to MyAssistant. I thought it would be a perfect tool for reminders, especially to get information to people that need to get it on a regular schedule."

"We have reports that need to go to certain people, such as our aged receivables report on certain days of the month. In the past, we had one person in the office that was physically printing out the report and then manually distributing it to people. Now it's a task handled by MyAssistant automatically, and she doesn't have to remember to do it."

"I have MyAssistant set up so that property managers will only get information for their properties. For example, they need to keep track of their tenants that are paying, so I have a daily cash summary that goes out to each of the property managers so they can know which of their tenants have paid."

"We also keep track of cash balances for our properties—we have automated weekly report that goes out to the people that need to know that information."

"We also use MyAssistant to provide notifications about leases that are expiring. And we use it to let us know about tenants with expiring insurance."

"Soon we're going to use MyAssistant for Job Cost and other areas. For example, I plan on receiving a weekly notification of what invoices are on hold and the reason for the hold."

"It's very easy to produce information for our multiple properties and provide access to it—MyAssistant just sends it out to the people that need it through email when they need it. Being able to easily disseminate information about multiple properties to the people that want it—that's the most important thing MyAssistant brings to our company."

"We liked the idea of a program that works with Timberline that gets all information to the people that need it so they can make decisions, and do it proactively. Being able to schedule all sorts of things where I don't have to think about it is great—MyAssistant just does what we need, automatically."

### CUSTOMER

Keystone Property Group

### INDUSTRY

Commercial Real Estate  
Development & Management

### LOCATION

Bala Cynwyd, PA

### 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.