

MyAssistant

For Sage Timberline Office



CUSTOMER SUCCESS STORY

MyAssistant provides visibility into contractor's business

RestoreCore is a full service contractor providing emergency response, restoration, and remediation for residential, commercial, and industrial clients. Ronald Meyer, CFO, implemented MyAssistant in 2006 and states "I really see several significant things MyAssistant provides us:"

"We have a policy that we need to receive a contract within 7 days of starting a job. If we don't have one within 7 days of the start of a job the project manager gets notified."

"To manage our cash flow and assure timely progress billings on our large jobs, we set up a MyAssistant notification to the General Manager and Project Manager when a large job goes more than 40 days without being billed. On small jobs we get notified if the job has been closed and not billed."

"While closing a month we sometimes discover that we have a balance in a suspense account. That balance could be a combination of several entries and can take a while to resolve. With MyAssistant I get notified the day anything is posted to a suspense account which makes it easier to address."

"We proactively track our key customer's activities. For example, we have a very large client that we like to keep our general manager and board of directors up-to-date on. When we get a new job from this client, MyAssistant automatically sends management a notification email with the pertinent details. This gives them the information they need to have proactive interactions with this client."

"We have good visibility into our collections. With MyAssistant an email automatically goes out to the general manager and project manager when any collection activity is entered into the system for collections on their jobs."

"MyAssistant notifies managers and the owner when employees have an anniversary or birthday. The owner is now calling every employee on their birthday. Prior to MyAssistant he wanted to do this however, he didn't have a consistent, dependable way to get this information."

"For larger jobs going over budget, MyAssistant notifies the general manager and appropriate project manager the day it goes over budget. This allows them to take immediate corrective action."

"MyAssistant has taken the adherence of policies and procedures from a manual process to an automated process, providing us the ability to be more efficient and consistently track our key processes."

CUSTOMER

RestoreCore

INDUSTRY

Restoration Services

LOCATION

Harrisburg, 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.