Sage MyAssistant Version 17.1
Release Highlights

Sage 300 MyAssistant 17.1 contains many enhancements that can increase productivity.

Reports and documents sent by MyAssistant can be automatically saved in designated folders. An easy way to search for Sage information has been added to the MyAssistant Live Tile. A new "Manage Unsent Email" option allows you to see and control what MyAssistant is sending. New controls for what information is shown in the MyAssistant Live Tile and Sage MyCommunicator has been added.

MyAssistant 17.1 Highlights

- Automatically save documents and reports to specified folders based on associated Job, Vendor, document type, etc.
- New settings to control what information each person sees in their MyAssistant Live Tile and Sage MyCommunicator for Outlook
- New "Manage Unsent Email" feature provides an easy way to see what's in queue to be sent and stop unsent emails
- New "super tool tips" provide education around sending reports with MyAssistant
- Generating spreadsheets for multiple Sage data folders with a single Task has been added
- Updated AR Aging spreadsheet templates to display outstanding amounts on invoices instead of original invoice amounts
- Updated PR Direct Deposit Reports attached to the prebuilt MyAssistant Tasks
- Enhanced the "Send one email per" option in Task Setup

See the following for a detailed review of the Sage MyAssistant 17.1 enhancements.

Save Email Attachments

MyAssistant 17.1 added the ability to automatically save a copy of reports and documents sent by MyAssistant. This new option can be used to file reports in a central job file, save documents that may need to be re-sent or save correspondence.

Information in Sage can be used to determine the appropriate folder to save reports and documents in. For example, MyAssistant can use the job number associated with project documents or reports; or the vendor-associated contracts, lien waivers or correspondence to determine the appropriate Windows folder.

The Save Report Attachments option is available in the Reports Options window that opens when attaching a report.

To use information from Sage in the folder name, click the "Use Sage value in folder name" button and select a Sage value. MyAssistant will automatically create folders with the appropriate name if needed.

Automatically saving the reports and documents that MyAssistant creates can result in more complete records of your business activity.

Enhanced Security

MyAssistant Security controls who can perform selected functions and what Sage information each person can see, and version 17.1 provides additional ways to control information access:

- Control what shows up in Sage MyCommunicator for Outlook: The "Follow up in MyCommunicator for Outlook" checkbox now determines if the Sage information found by the MyAssistant Task will be visible in Outlook.

  This checkbox can be found in the Notification Options step of Task Setup. Check the box to make the information found by the Task visible/available in MyCommunicator. Check this option if anyone will be performing the following in Outlook:
   - Looking up information in Sage that's made available with the Task
    - Forwarding items (e.g. invoices, change orders, etc.) for follow up
    - Updating information in Sage from Outlook
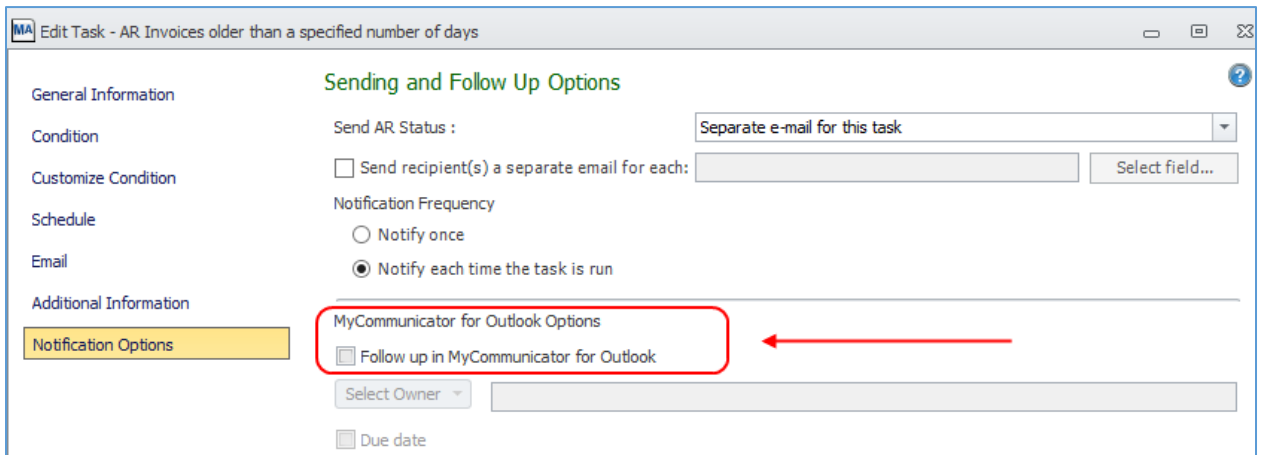
- Control what Tasks are in the MyAssistant Live Tile: A new option to control whether Tasks are displayed in the MyAssistant Live Tile was added; allowing for greater security around sensitive information (e.g. emailing weekly pay stubs). Using this with MyAssistant Security can also ensure anyone with a Live Tile only sees information relevant to them.

  This checkbox is found in the Notification Options step of Task Setup. Check the "Do not show in Live Tile" box to keep the Task and its associated Sage information from appearing in the MyAssistant Live Tile.
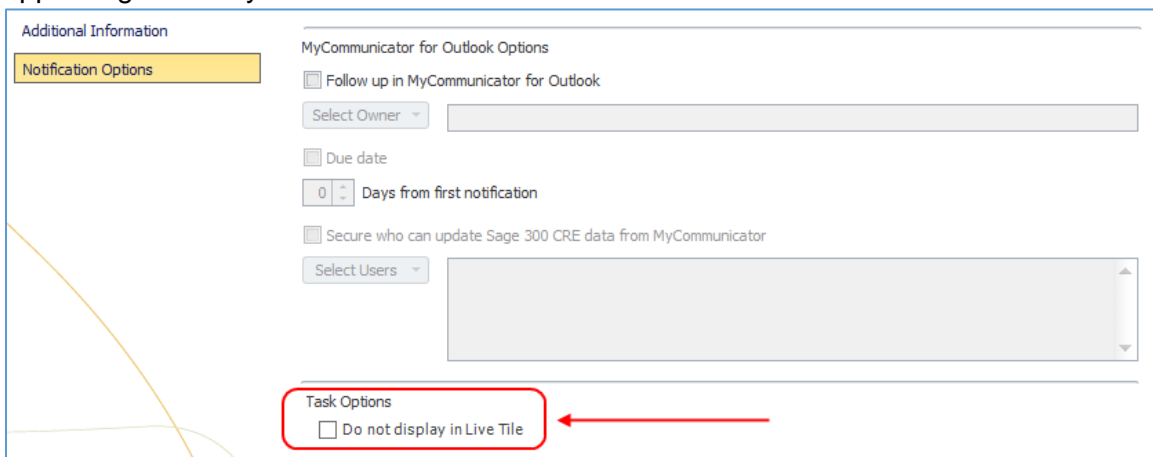
Help Where You Need It

Sage MyAssistant 17.1 contains the first set of new "super tool tips" that will provide detailed instructions next to Task Setup values, options and toolbar buttons. Tool tips have been added to the Report Options window in MyAssistant Task Setup that provide additional education about how attached reports work with MyAssistant Tasks.

Attach a report to a MyAssistant Task to open the Report Options window. Hover your mouse over a blue "i" icon to read the Super Tool Tip.

Managing Sending Email

The new "Manage Unsent Emails" feature in MyAssistant 17.1 added the ability to monitor and – if needed – stop MyAssistant emails that have not yet sent. This allows for greater control managing MyAssistant emails by adding the ability to stop emails and/or remove any information from MyAssistant that should not be sent out.

To access this feature, click the "Manage Unsent Emails" button in the MyAssistant ribbon. All emails that are scheduled to send but haven't yet will be grouped by Task:
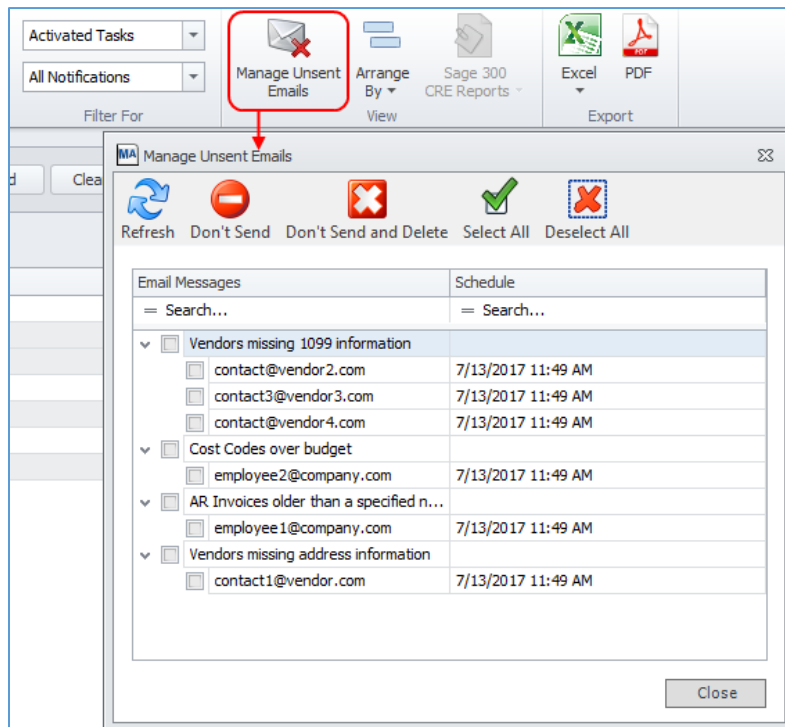
This window lets you stop the delivery of individual emails, all the emails being created and sent as result of running a MyAssistant Task, or all emails scheduled to be sent across all Tasks that have been run. There is also a "Don't Send and Delete" option that stops any selected emails from sending and deletes any Notifications found by the associated MyAssistant Task, making it ideal for easy cleanup and removal of unneeded information from the MyAssistant software.

Updated Spreadsheets

An option to automatically create and send Excel spreadsheets containing information entered in Sage 300 was added to MyAssistant in version 15.

This feature was enhanced in version 17.1 to automatically create and send Excel spreadsheets for multiple Sage data folders. This means that if a Task with an attached spreadsheet template is running across three data folders, the email sent by the Task would have three separate Excel spreadsheets attached.