Sage MyAssistant version 22.1
Release Highlights

Sage 300 MyAssistant 22.1 provides many customer-requested enhancements that help you do more. Customers asked for easier ways to:

- Automate more workflows like sending employee or vendor payment notices, lien waivers, Customer Statements, etc.
- Create simple alerts like expiration dates, missing information or incorrect data entry
- Send Sage information in spreadsheets
- Get help when working in MyAssistant
- Learn how others are using MyAssistant

MyAssistant 22.1 Enhancements

- A new MyAssistant "Task" setup process
- Specify what you want to find in Sage with new English-like "Conditions"
- 400+ preconfigured "Conditions" converted to English-like setup for easy customization
- Option to save emailed spreadsheets to job, vendor, etc. specific folders
- Automatically name Tasks based on the Email Subject
- New Help instructions and information icons
- 200+ new Formulas that report on Sage information
- Additional MyAssistant Server settings accessible from the Designer
- Solve problems quicker using common solutions in a new System Log
- Upgraded software to Windows 11 look and feel
- New "MyAssistant Ideas" service
- Compatible with Sage versions 20.1 and later
- Enhance software performance by automatically removing closed notifications

The following pages outline MyAssistant 22.1's enhancements and detail its new, simplified workflows.

Simplified "Task" Setup

The following outlines the simplified Task setup process for sending notifications / alerts, spreadsheets and generate reports, statements and documents.

Sending a List of Notifications or Alerts

Setting up Tasks to automatically send a list notifications like past due invoices, Jobs recently set up, Vendors with expiring insurance, or Employees missing information is a few steps. For example, let's automatically send a list of cash receipts received:

1. Start by opening a new Task, then picking what you want to send: Select "**List of Notifications**", then choose what you want to send a list of:
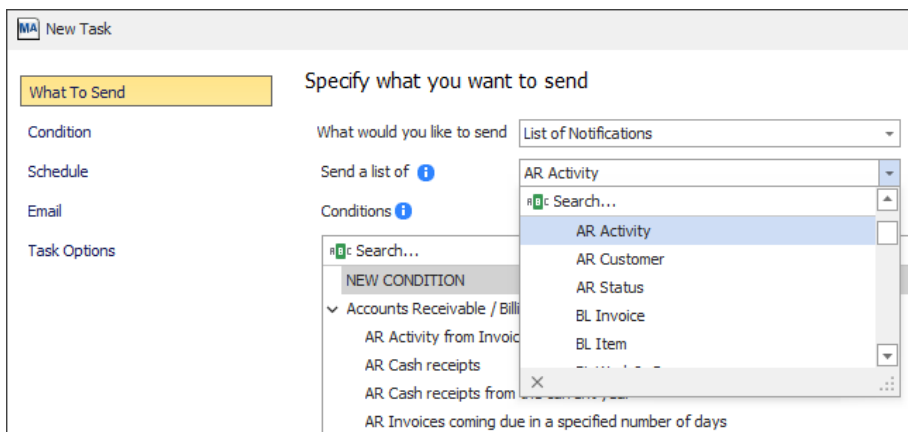
2. Select a pre-built "Condition" that creates a list given specified criteria, or choose to create a "New Condition"

3. Create or customize the Condition's with new, English-like statements. For example,

   a. Change the first row by selecting a Sage field (*e.g. AR Customer Status*), an operand (*equals*) and a value to test against.
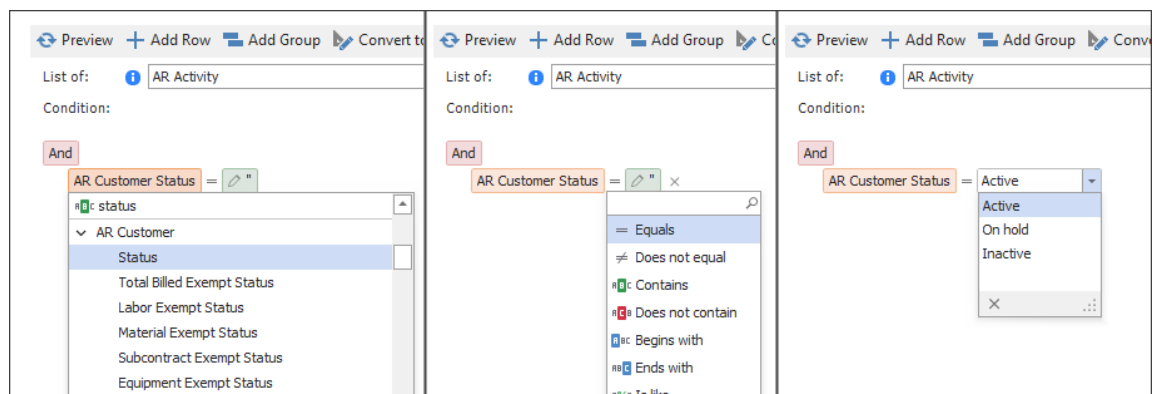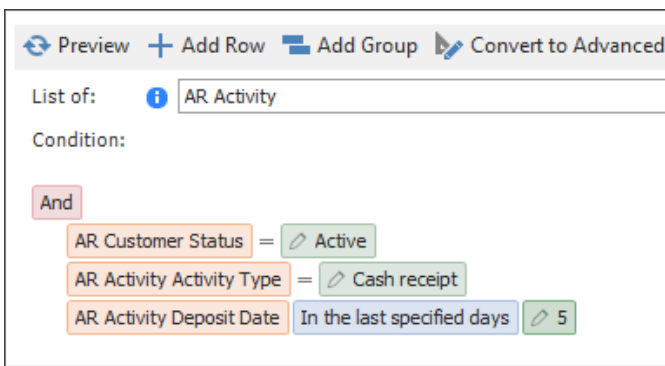
b. Add lines to the Condition with the "Add Row" button
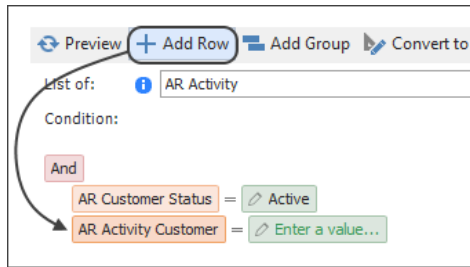

c. Edit additional rows to dial in exactly what you want

d. Click "Preview" to confirm the information the Condition found is what you want

See page 11 for more information on the new Condition functionality.

4. Schedule when the Task should automatically run.

5. In the Email step: Click & drag the Sage information that you want included in your Notification list from the list on the right to the bottom-middle section, then add recipients and an Email subject
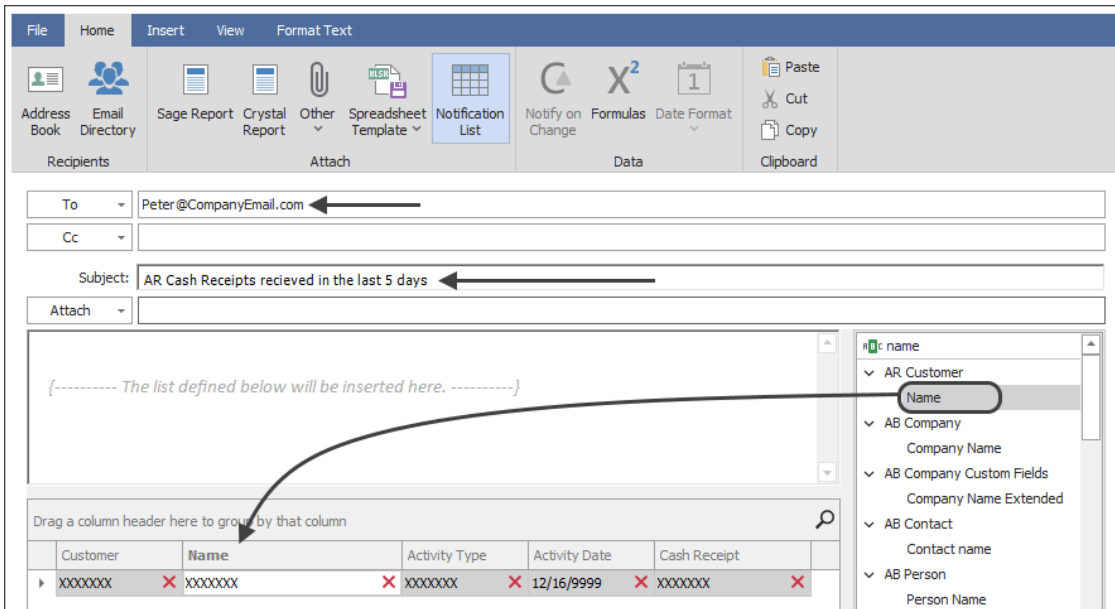

6. Finish Task Setup and send the email(s)

Sending a Spreadsheet

While many customers already use MyAssistant to send spreadsheets, MyAssistant 22.1 features an easier way to send things like AR Aging, AP Invoice Register and Cost to Completion data in an Excel format. For example, to automatically send someone a spreadsheet of jobs that are over budget:

1. Start by opening a new Task, then picking what you want to send: Select "**Spreadsheet**", then choose what you want to send a Spreadsheet of:
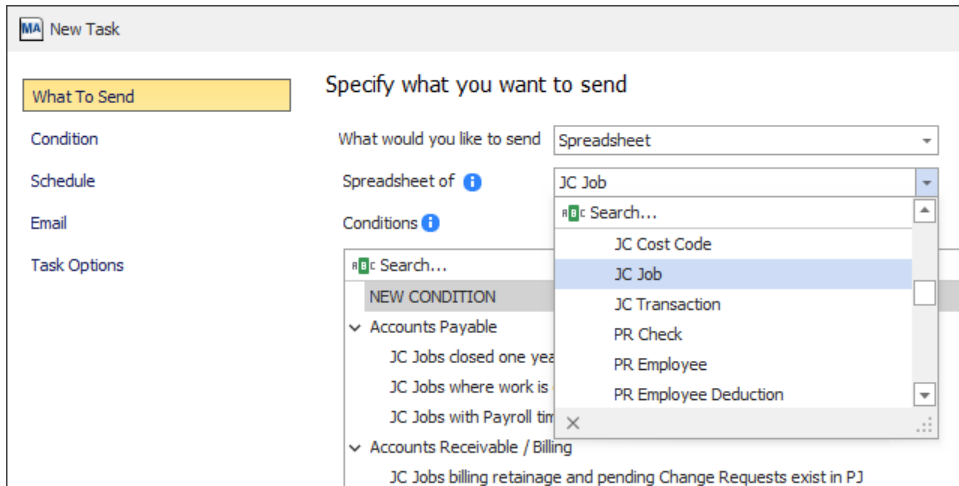
2. Select a pre-built "Condition" that creates a spreadsheet given specified criteria, or choose to create a "New Condition"

3. Create or customize the Condition's with new, English-like statements. For example,
   a. Change the first row by selecting a Sage field (*e.g. JC Job Status*), an operand (*equals*) and a value to test against.
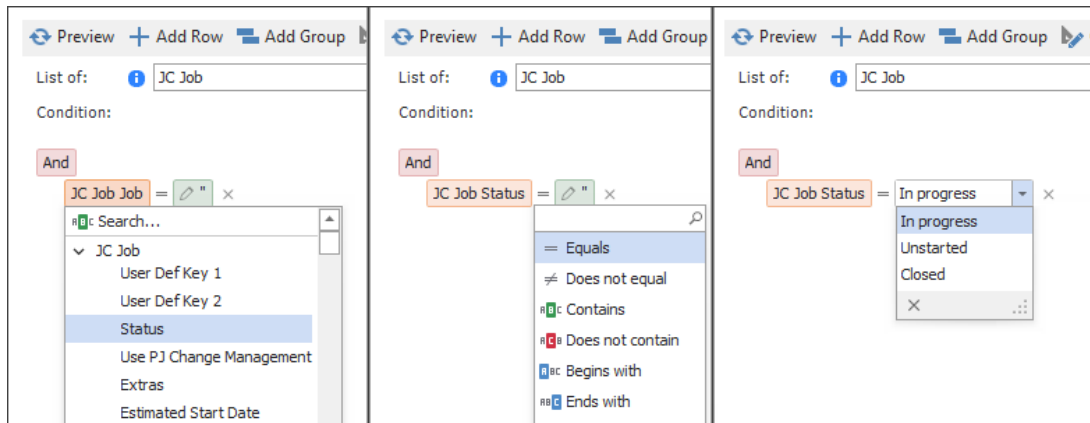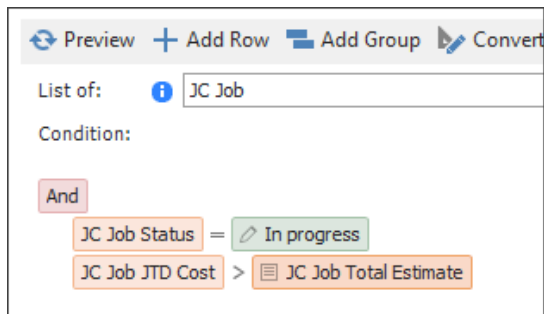
b. Add lines to the Condition with the "Add Row" button
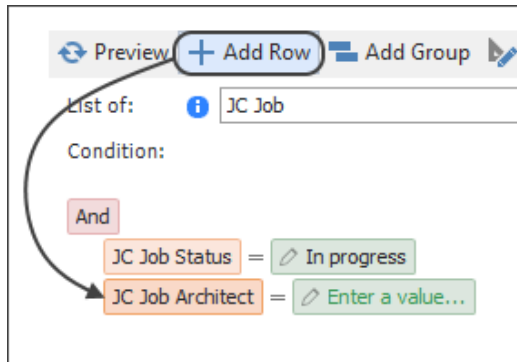
c. Edit additional rows to dial in exactly what you want

d. Click "Preview" to confirm the information the Condition found is what you want

See page 11 for more information on the new Condition functionality.

4. Schedule when the Task should automatically run.

5. In the Email step: Click & drag the Sage information you want in your spreadsheet from the list on the right to the bottom-middle section. Arrange in the order you want, then click the "Spreadsheet Template" button in the ribbon and select "Use Notification List":
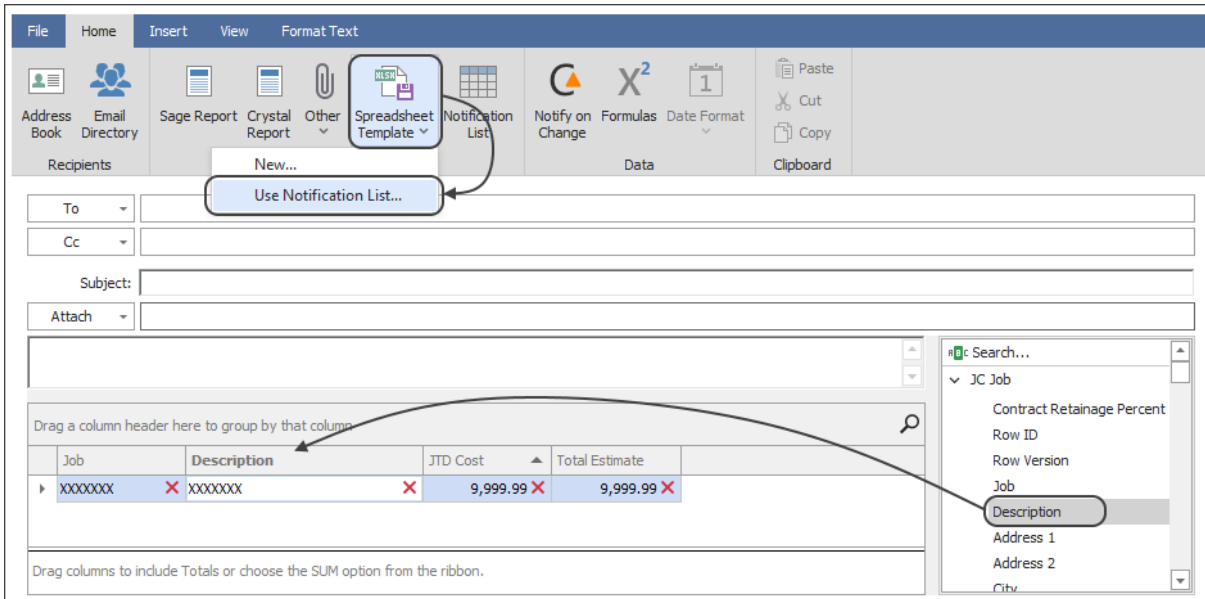
This will automatically create a spreadsheet template (what MyAssistant will use to build the spreadsheet)

6. Adjust the column widths in the new window that opens, preview the spreadsheet to confirm you're getting what you want, then click "Save & Close" in the ribbon:
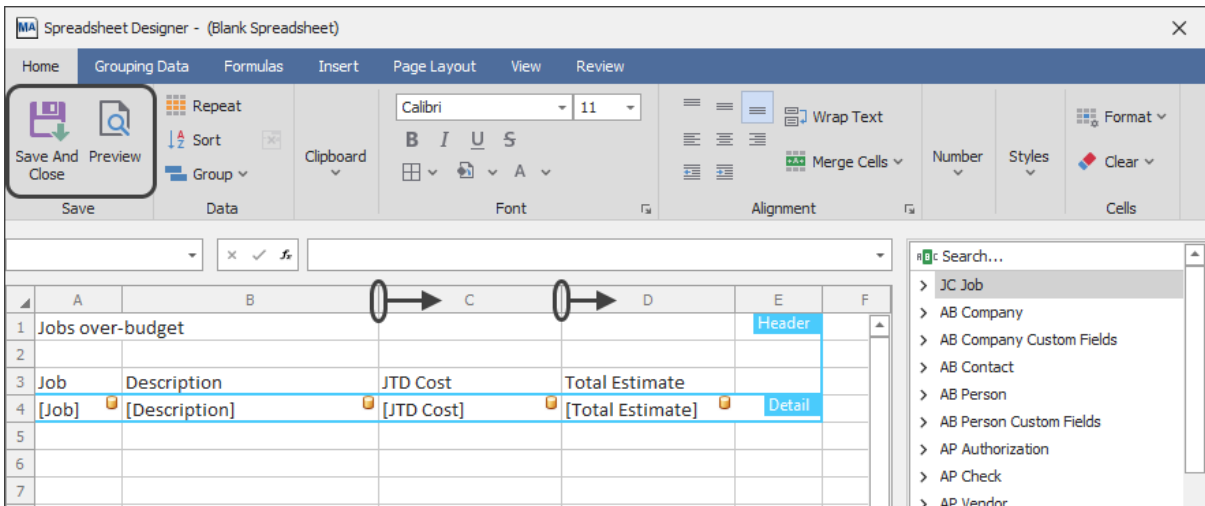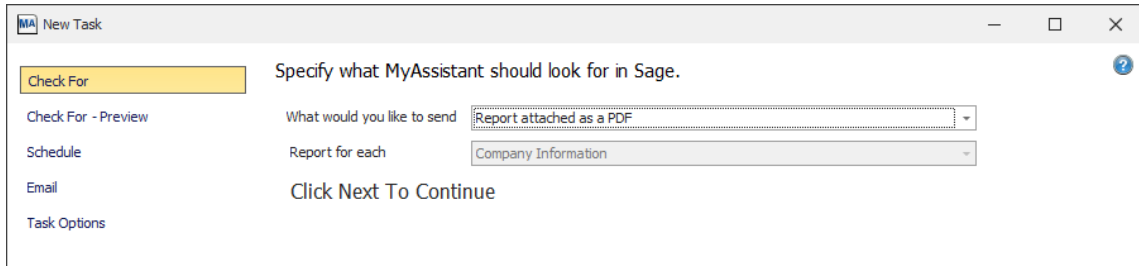

7. Add recipients and a Subject, then complete Task Setup.

Sending Reports

A common customer request is to automatically send reports. Using MyAssistant to send Sage reports where everyone gets the same information consists of the following:

1. Open a new Task and select "**Report attached as a PDF**":
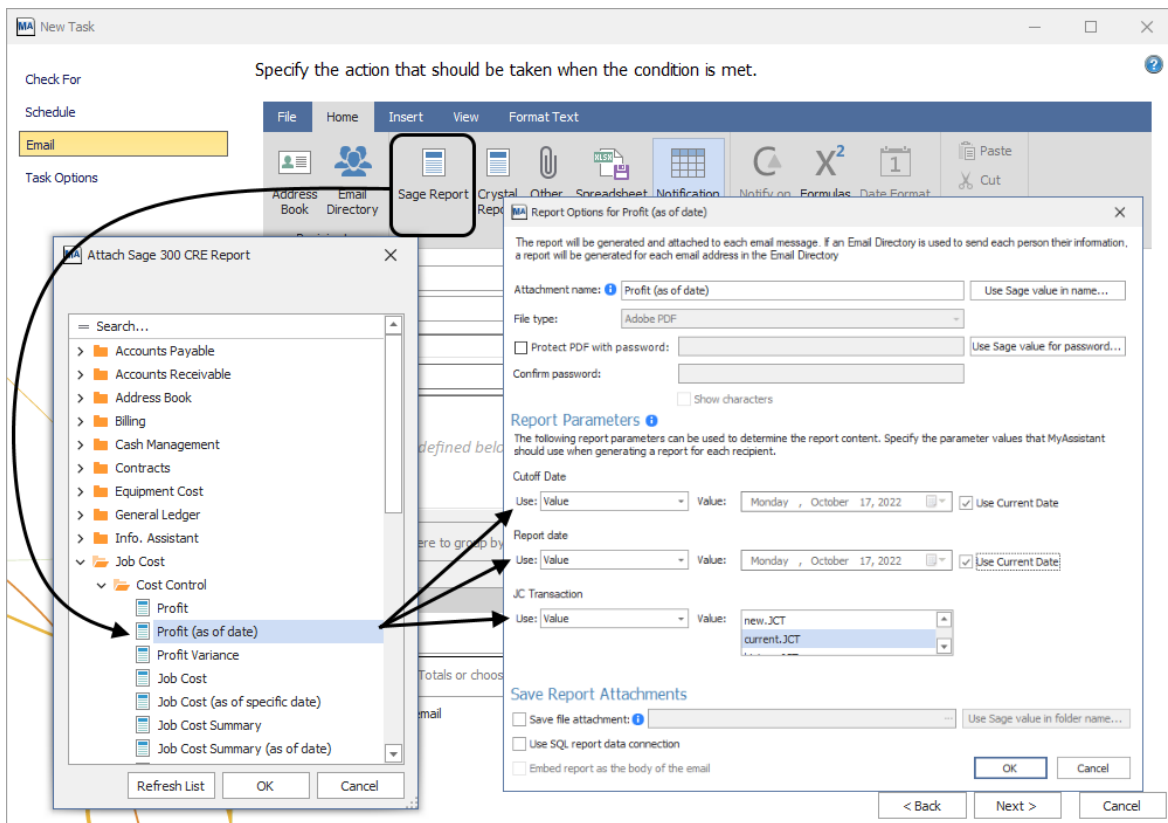
2. Schedule when the Task should automatically run.
3. In the Email Step: Click the "Sage Report" button and select your report from the window that opens
4. Fill out any report prompts in the Window that opens, then click OK

5. Add recipients & a Subject, then finish Task Setup

**Sending Each Person Reports or Documents with Just their Information**

Many companies use MyAssistant to send people their reports or documents with only their information. Common examples include sending Employee pay statements, Customer statements, or electronic payment notifications to Vendors.

For example, creating a Task to send each employee their pay stubs now consists of the following:

1. Open a new Task, then choose what you want to send: Select "**Each person their reports or documents**", then choose the Sage information to use for deciding who does & doesn't get an email (i.e. a "mailing list"):
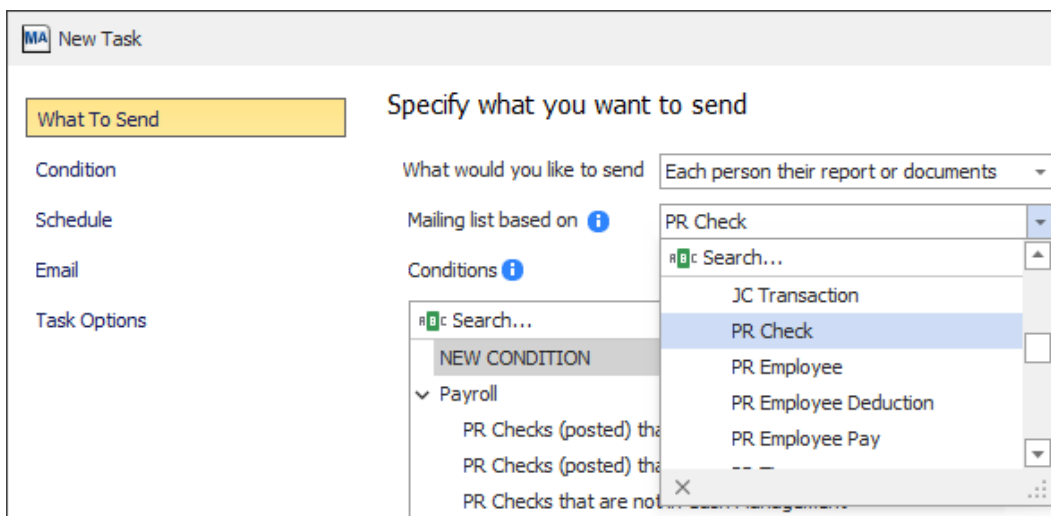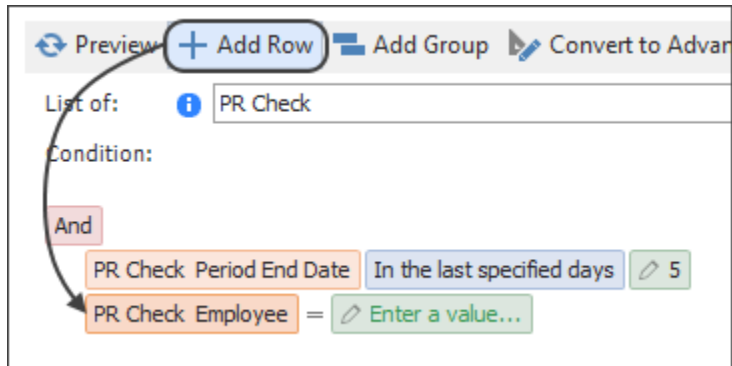

2. Select a pre-built "Condition" that creates a list given specified criteria, or choose to create a "New Condition"

3. Create or customize the Condition's with new, English-like statements. For example,
    a. Change the first row by selecting a Sage field (*e.g. PR Check Period End Date*), an operand (*in the last specified days*) and a value to test against.
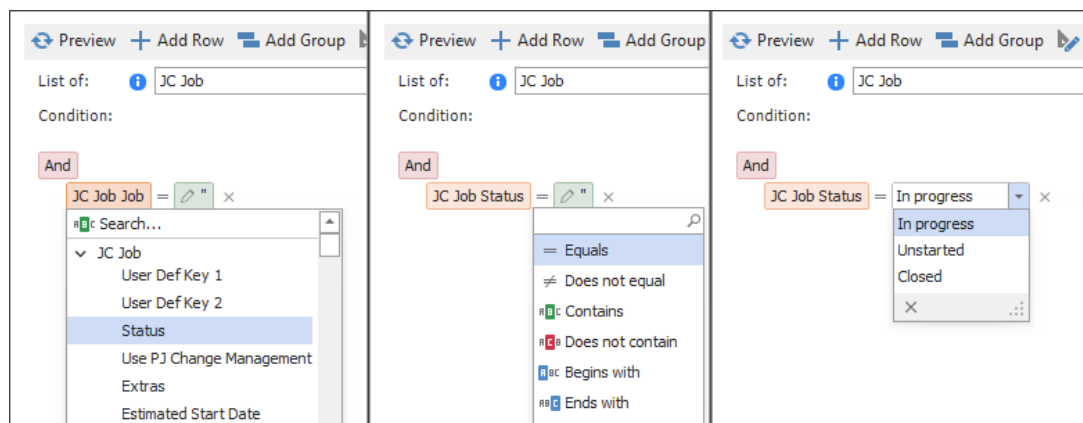
b. Add lines to the Condition with the "Add Row" button

c. Edit additional rows to dial in exactly what you want

d. Click "Preview" to confirm the information the Condition found is what you want

See page 11 for more information on the new Condition functionality.
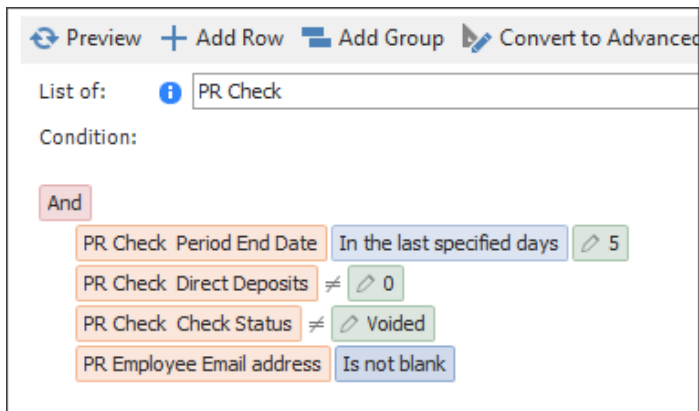
4. Schedule when the Task should automatically run.

5. In the Email step: click "Sage Report" or "Crystal Report" and select the report that includes the prompts needed to filter the content by recipient (e.g. prompt for Project Manager on Cost Reports, Employee ID on pay statements, or Customer ID prompt on customer statements).

6. Update the prompts in the window that opens to use values from Sage fields to filter the content of the report:
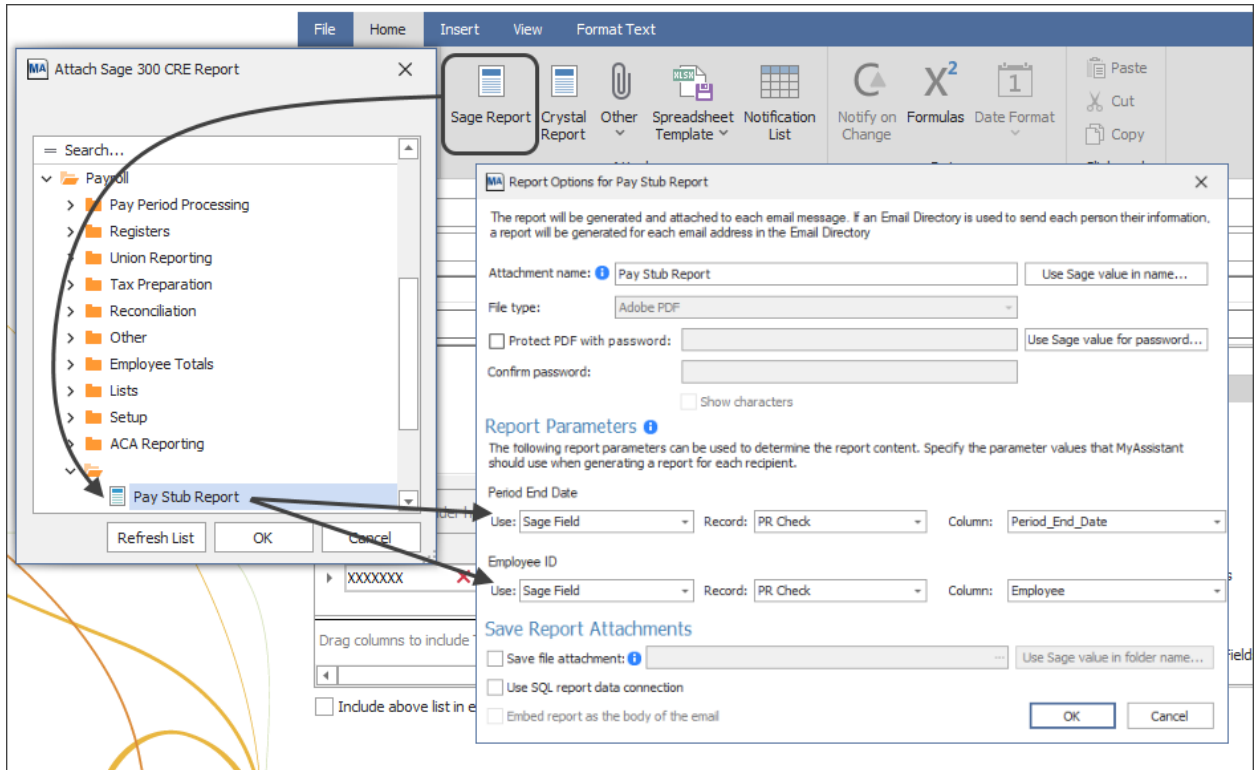
7. Click "Email Directory" in the ribbon and select the Email Directory that will look up an email address for each item found by the Condition
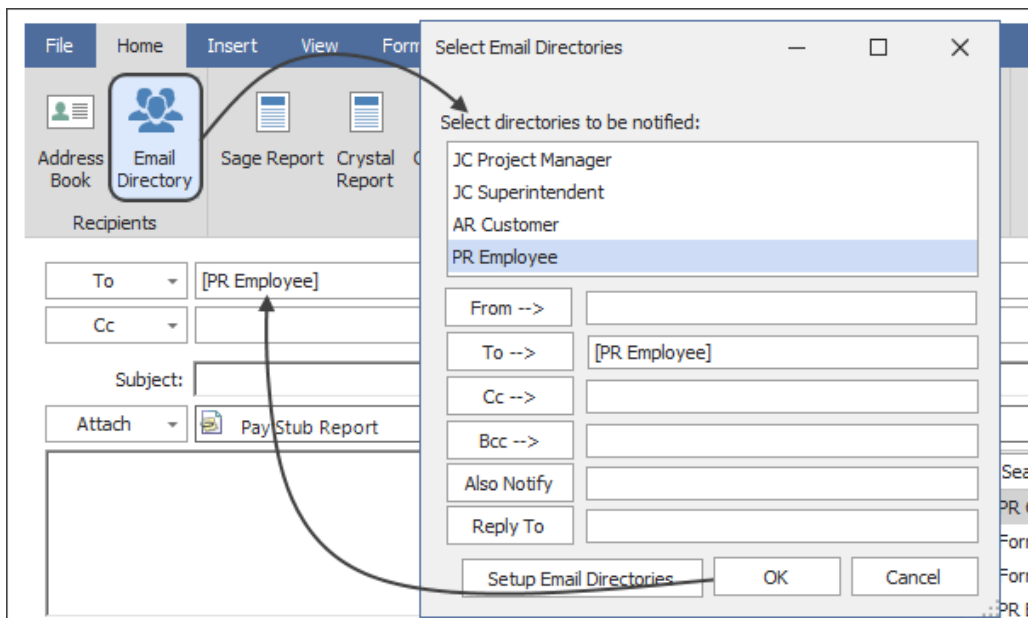
8. Finish Task Setup & send emails

Find Information in Sage with New, English-Like Conditions

Making it easier to specify what you'd like MyAssistant to find was a top Customers request. To address this, Conditions were redesigned in MyAssistant 22.1 to use simple, English-like statements like:

- o Checking for a date "*in the last specified days*" or "*in the next 30 days*"
- o Selecting Jobs numbers that "*Begin with*", "End with" or "*Contains*" certain characters
- o Checking for amounts over a specified number in a range of numbers
- o Looking up Sage information like sums, counts or calculations using MyAssistant Formulas

Creating Conditions now consists of adding and changing rows of easy-to-understand text.
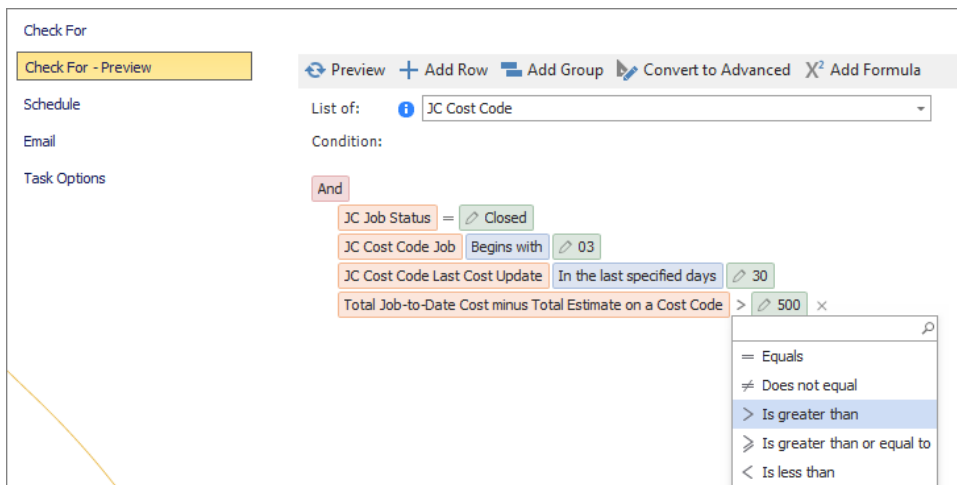
This could include:

Selecting/changing the Sage field you want to check:
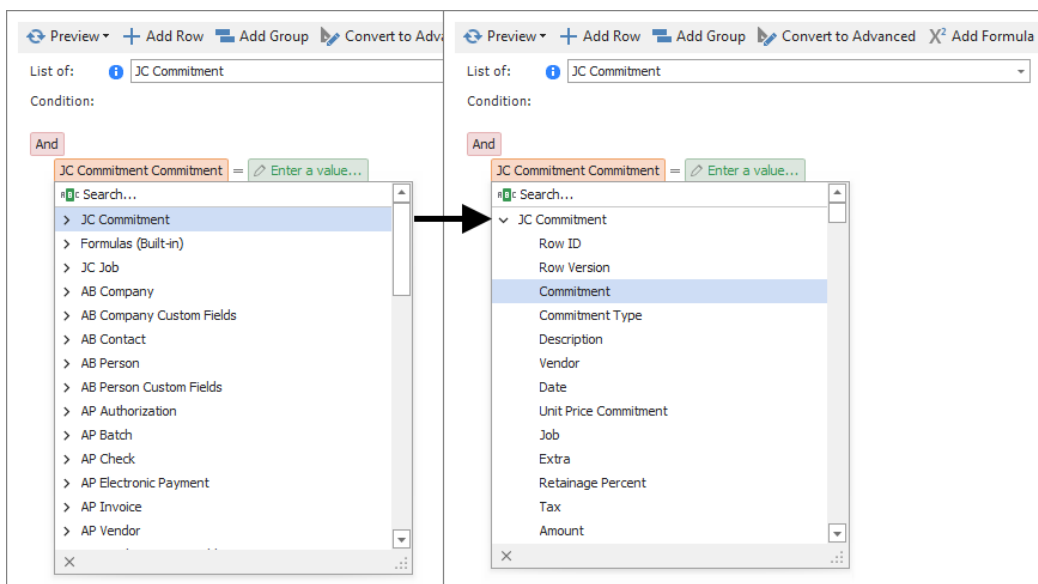
Choosing the operand for what you want to do:

The real power are the 75 "Operands", which will change based on what you're conditioning on (i.e. a date, number or text)

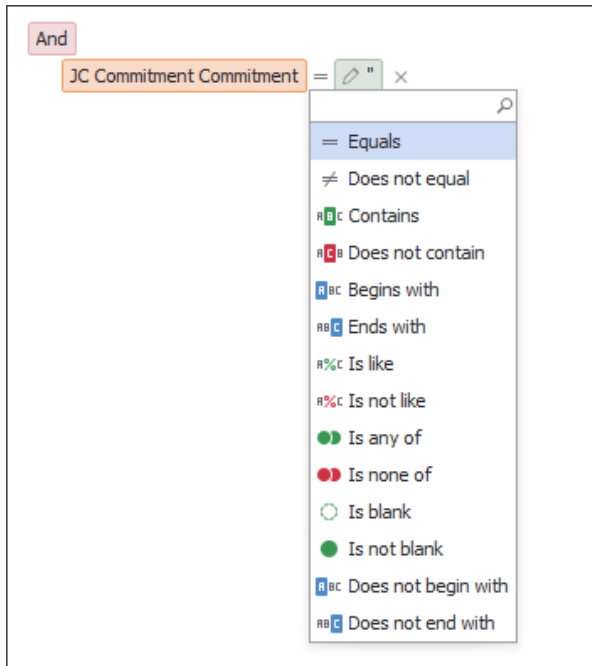| Text Operands |
| --- |
| = Equals |
| ≠ Does not equal |
| ᴀʙᴄ Contains |
| ᴀᴄʙ Does not contain |
| ᴀʙᴄ Begins with |
| ᴀʙᴄ Ends with |
| ᴀ%ᴄ Is like |
| ᴀ%ᴄ Is not like |
| ●❯ Is any of |
| ●❯ Is none of |
| ○ Is blank |
| ● Is not blank |
| ᴀʙᴄ Does not begin with |
| ᴀʙᴄ Does not end with |

Number Operands
= Equals
≠ Does not equal
> Is greater than
⩾ Is greater than or equal to
< Is less than
⩽ Is less than or equal to
[...) Is in range
[...) Is not in range
[...] Is between
●❯ Is any of
●❯ Is none of

Date Operands		
⊞ Is today	○ Is blank	▣ Is next month
⊞ Is before today	● Is not blank	▣ Is next year
⊞ Is after today	[..⊙] Is in date range	▣ Is last month
7 In the next specified days	[..⊙] Is not in date range	▣ Is last year
7 In the last specified days	⊞ Is later this year	⊞ Is the year-to-date period
31 Is more than specified days in the future	⊞ Is in the next 30 days	Jan Is January
31 Is more than specified days ago	7 Is in the next week	Feb Is February
⊞ In the last specified days or newer	⊞ Is in this year	Mar Is March
⊞ In the next specified days or older	⊞ Is in this month	Apr Is April
[...] Is between	7 Is in the last week	May Is May
⊞ Is beyond this year	⊞ Is in the last 30 days	Jun Is June
= Equals	⊞ Is earlier this year	Jul Is July
≠ Does not equal	▣ Is prior to this year	Aug Is August
> Is greater than	⊞ Is same day	Sep Is September
≥ Is greater than or equal to	⊞ Is this month	Oct Is October
< Is less than	⊞ Is this week	Nov Is November
≤ Is less than or equal to	▣ Is this year	Dec Is December

Entering a value or choose a Sage field or MyAssistant formula to check against:

Previewing the Condition at any time to confirm you're getting the right information:

Preconfigured Conditions converted to English-like setup

Sage Customers often start with the "prebuilt" Tasks to learn about MyAssistant. However, they would like customize them to get exactly what they wanted. To help with this, more than 400 Conditions that come with the MyAssistant have been converted to use the new, English-like statements. This lets you easily customize existing Conditions to use on your Tasks and get exactly the information you're looking for, including almost all prebuilt Tasks that are pre-installed with MyAssistant.

Save Emailed Spreadsheets to "Smart" Folders

Just like with reports attached to Tasks, Sage customers asked to save copies of spreadsheets they send with MyAssistant. In MyAssistant 22.1, emailed spreadsheets can be saved to a specified folder. MyAssistant can also automatically save using "smart" folders that are based on values in Sage (e.g. Customer, Vendor, Job, or Project Manager Name). For example: you could send each Project Manager a weekly cost spreadsheet for each of their Jobs, then have MyAssistant automatically create a folder named after the Project Manager with a copy of each spreadsheet.

New System Log

MyAssistant 22.1 features a System Log in the MyAssistant Designer that identifies and explains (in non-technical terms) what happened if an error occurs:
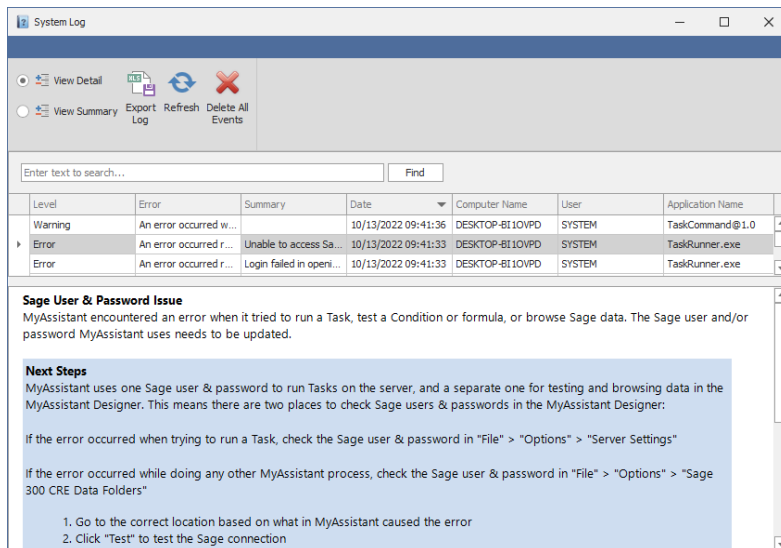
This helps you solve common issues yourself with step-by-step instructions. If someone else needs to review the log, you can also export a copy to Excel.

New Help, additional resources, tooltips and information icons

To help Sage customers understand what's changed in MyAssistant and provide more information overall, MyAssistant 22.1 includes several resources:

MyAssistant's "Help" has been completely rewritten to align with the new software. MyAssistant Help can be accessed at any time from the File menu, or by clicking the "?" in the top-right of the window.

A new User Guide is available in the Windows Start menu and the MyAssistant File > Help menu.

Also, new software tooltips and information icons have been added throughout MyAssistant. This provides more contextual information around the specific things you're looking at.

General Software Improvements

- Added 200+ MyAssistant Formulas that report on Sage information and can be used in Conditions, emails, spreadsheets, report prompts and more. Please see the addendum at the end of the document to see all the new MyAssistant formulas added to the software
- New Tasks can be automatically named based on the Subject line in the Email step
- Additional MyAssistant Server settings are now accessible from the MyAssistant Designer
- Enhanced MyAssistant's performance by automatically removing old Task results (i.e. "Notifications") that no longer meet the Task criteria
- Created new service that gives you the option to receive new ideas on how to use MyAssistant
- Compatible with Sage versions 20.1 and later