Sage MyAssistant 22.1

User Guide

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How MyAssistant Works

MyAssistant monitors for specific situations based on your information in Sage and automatically informs someone. This can be as simple as sending someone a list of Jobs that haven't been billed in a number of days, or an AR aging spreadsheet to the people who need to know. MyAssistant automatically provides information to the people who need it to help run the business.

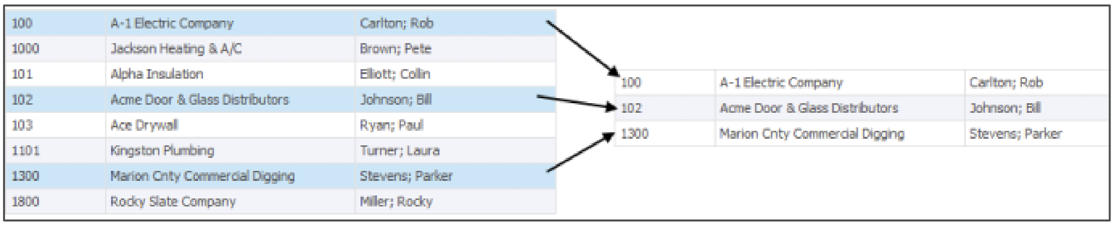
MyAssistant uses automated processes called "Tasks" to monitor specific information in Sage and notify someone via email. Tasks tell the software what to look for, who to email and what you want to send them.

Running Tasks is made up of the following processes:

1. A Task runs (either by a Schedule or being manually triggered by a user)

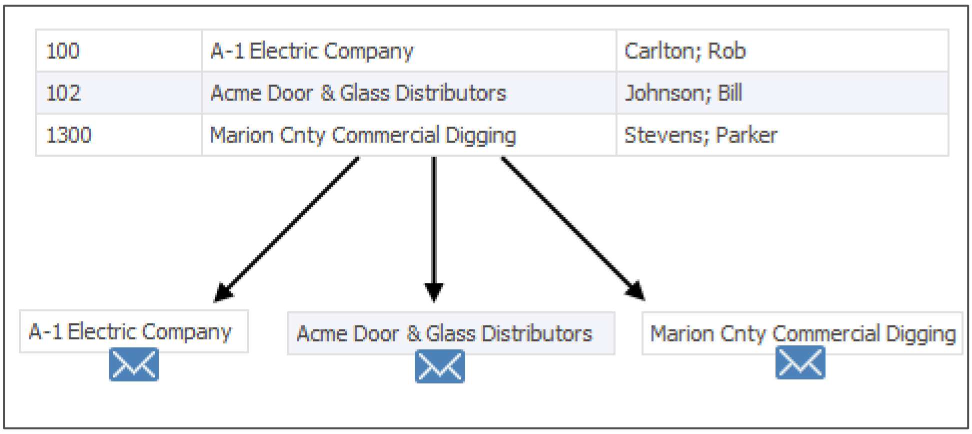
2. MyAssistant looks up specific information in Sage that meets the criteria specified in the Task's Condition.

   Example: A Task can look for Vendors with Expiring insurance



3. When the specified information is found, MyAssistant determines if emails need to be sent and creates as many messages as needed (based on the Recipients). Specific email addresses can be entered on the Task, or MyAssistant can look up who to notify based on what was found.

   Example: MyAssistant can look up an email addresses for Vendors with expiring insurance and create a separate email for each one



4. Emails and any attachments are created by pulling information from Sage, including:

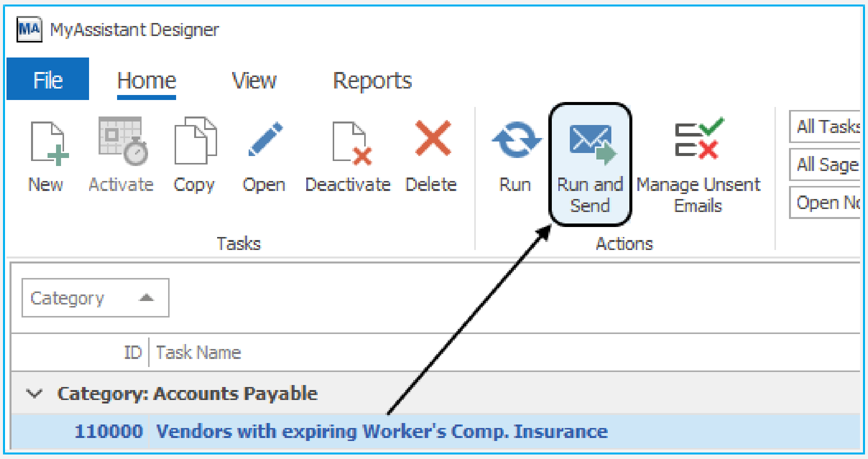
    - Lists & form letters in the email body are created based on the Task's setup
    - Spreadsheets are created if a MyAssistant Spreadsheet Template is attached
    - Any reports from Sage menus are generated
    - Documents, spreadsheets and/or text files are created from any attached Crystal Reports

    Example: MyAssistant creates a separate email with a form letter for each Vendor, containing only their information.

5. MyAssistant sends the emails

Please note: A Task can only send emails if:

- When run, the Task finds information in Sage that matches the criteria in its Condition
- At least one recipient is specified in Task Setup
- The Task is set up to run automatically on a schedule, or is manually triggered by selecting it and clicking "Run and Send"



Related Links

How to Start Using Prebuilt Tasks

Task Setup

How to Start Using MyAssistant

Customers find early success with MyAssistant by starting with Prebuilt Tasks. Prebuilt Tasks are common things other companies have used MyAssistant to automate, and can be customized to meet your needs. This section will walk through how to find prebuilt Tasks that may interest you, turn them on, and see what kind of information you can receive.

Determining What to Automate

When trying to think of new ways for your company to use Sage MyAssistant, the first step is to build a list of things that you'd like to have automated.

To help build your list, ask yourself questions like:

- What do I spend time tracking down / getting from others?
- What information would I like sent to me without asking for it?
- What reports/emails/etc. would I like automatically sent to someone?

Next, review the "MyAssistant Prebuilt Task List" to find Tasks that you'd like to try out and see what you can receive.

Setting up the Automation (i.e. the Tasks)

After determining what you want to automate with MyAssistant, the next step is to start setting up MyAssistant Tasks to perform the desired actions.

How to Quickly Get Started Using MyAssistant

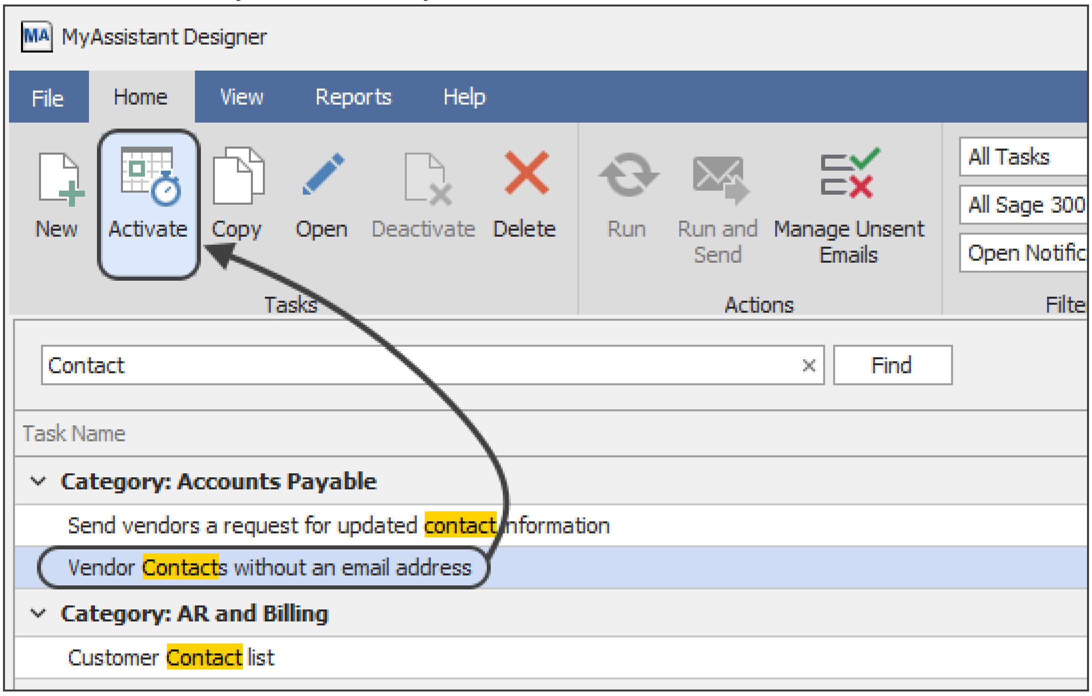
Sage MyAssistant is installed with several hundred prebuilt Tasks that are ready to be used. As such, most Sage customers find success by starting with the following steps:

1. Activate a prebuilt Task
2. Send the email to yourself
3. Make changes
4. Re-send to yourself
5. Repeat steps 3 and 4 until satisfied
6. Update recipients

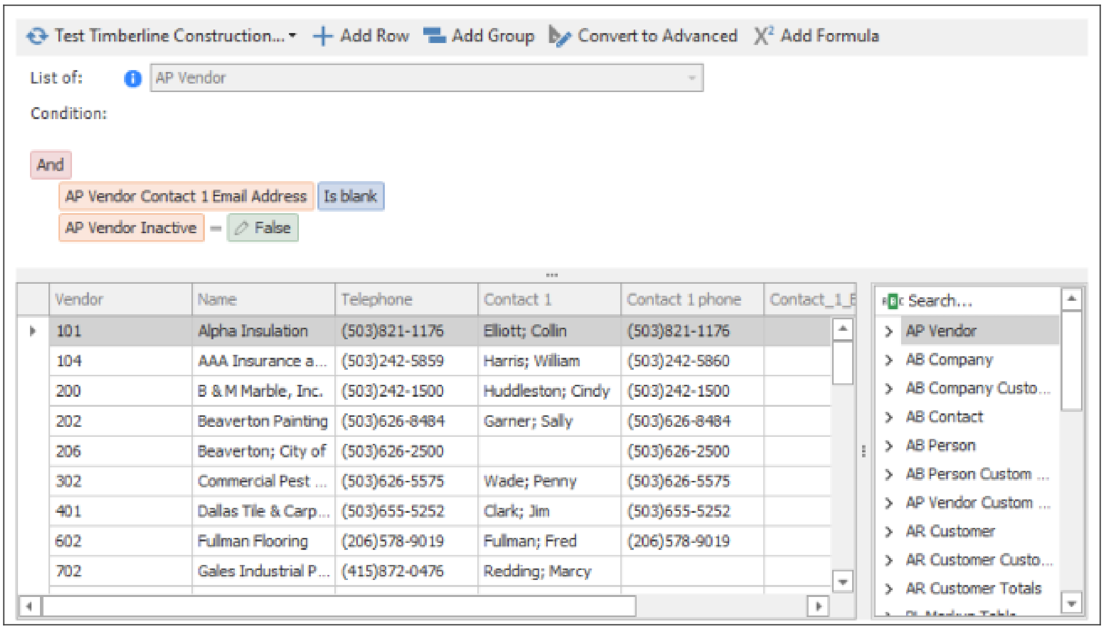
Using the above steps enables you to explore and test out the MyAssistant software without sending anything to anyone other than yourself until you are ready.

How to Start

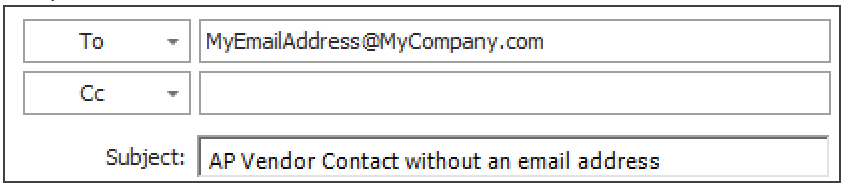
1. **Use Search:** MyAssistant has 300+ prebuilt Tasks installed, so using the Search in the main MyAssistant window will help you look through the list quickly
2. Select a Task that you'd like to try & click Activate



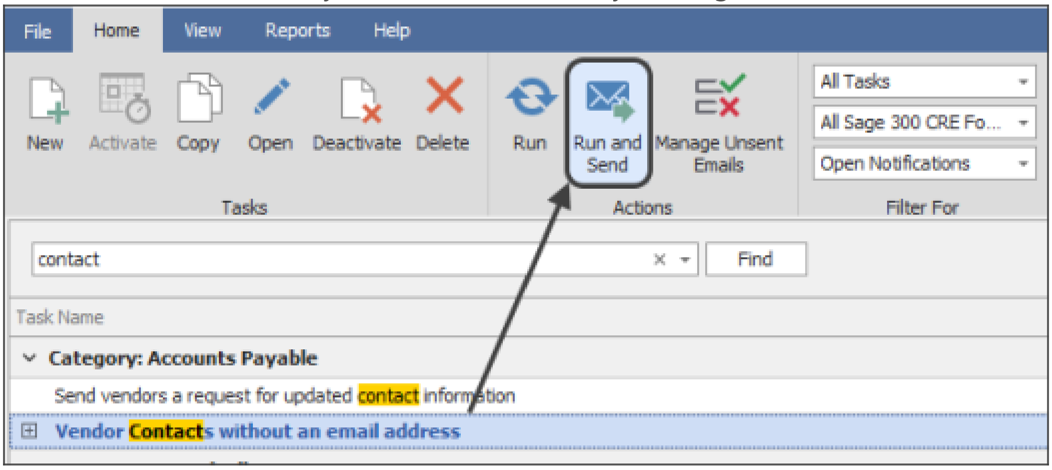
3. Preview the Condition to make sure you're getting the information you want from the Task



4. Advance to the Email step, and type your name in the "To" line to make yourself the recipient



5. Complete Task Setup & send yourself an email
6. Identify any changes you want made
7. Open the Task
8. Go back to the Email step and make any desired changes. For example:
   - Add or remove columns from the list
   - Turn the emailed list into a spreadsheet
   - Attach a report
9. Close the Task and send yourself a new email by clicking "Run and Send"



Related Links

Send a List of Notifications Overview

Send a Spreadsheet Overview

Send Reports & Documents Overview

Send a List of Notifications Overview

One challenge companies face is knowing when something needs to be addressed. This could range from Vendors with expiring insurance, costs posted to a closed Job, or even missing Employee contact information. MyAssistant can send a list of the items someone needs to look at (i.e. "Notifications") in a timely manner.

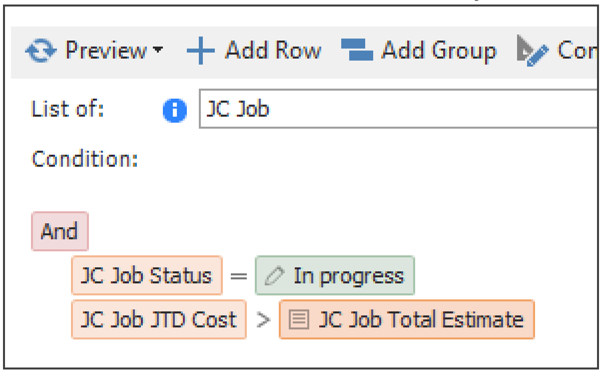
This section outlines how to create a Task to send a list of Notifications:

1. Click the "New" button in the main MyAssistant window to create a new Task

2. Choose what you want to send a list of (e.g. a list of Jobs) in the "Send a List of" selection list.

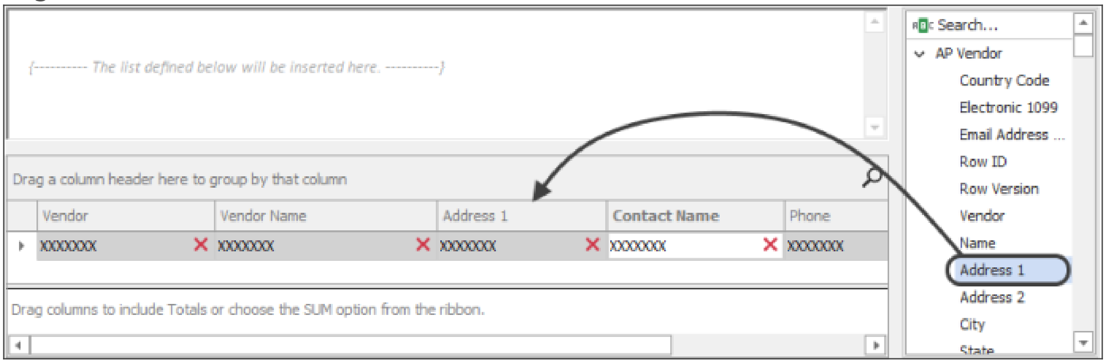
3. Use a prebuilt or create a new Condition to filter your list to only the items you want (e.g. Jobs over budget, Jobs not billed in the past specified days, etc.)

4. Create or customize the Condition (e.g. all open Jobs where the JTD Cost is greater than the Total Estimate) to ensure MyAssistant is looking for what you want



5. Specify whether the Task should run on a Schedule

6. Update the columns in the table at the bottom of the Email step -- this controls what Sage information is included in the emailed list.



7. Specify the recipients that should be informed when then Condition is met. An Email Directory can be used to send each recipient a list of only their items (e.g. send each Project Manager only their Jobs).

8. Confirm your settings in the Options step

Related Links

What to Send - Send a List of Notifications

Email a List of Notifications

Send a Spreadsheet Overview

Many people like to receive information in an Excel spreadsheet. Any information in Sage can be sent in a spreadsheet using MyAssistant. Examples include AR Aging Spreadsheets, Job Cost Breakdown spreadsheets, and AP cash flow spreadsheets. Spreadsheets can be added to MyAssistant Tasks using Spreadsheet Templates, which define the spreadsheet's content and layout.

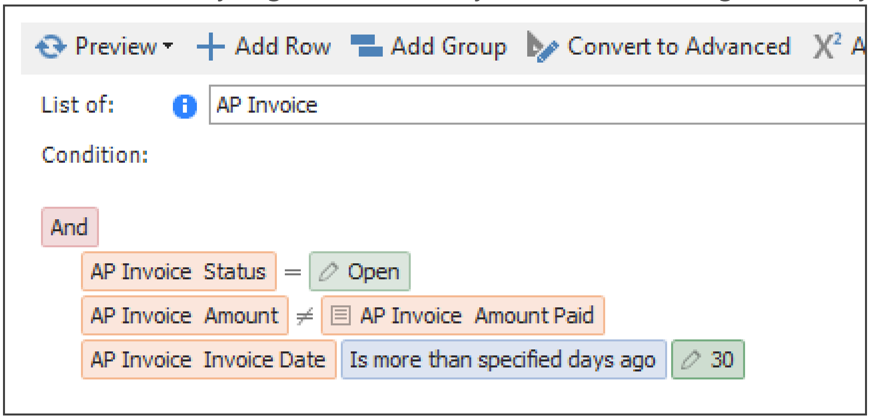
This section outlines how to create a Task to send a Spreadsheet:

1. Click the "New" button in the main MyAssistant window to create a new Task

2. Select that you want to send a Spreadsheet, then pick what you want to send a spreadsheet of (e.g. a spreadsheet of AP Invoices) in the "Spreadsheet" selection list.

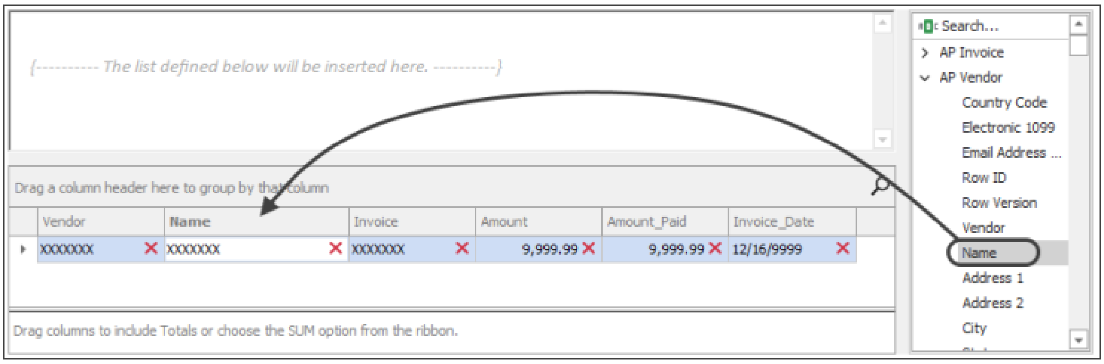
3. Use a prebuilt or create a new Condition to filter your spreadsheet to only the items you want (e.g. AP Invoices not fully paid, AP Invoices open for a specified number of days, AP Invoices over a specified dollar amount, etc.)

4. Create or customize the Condition (e.g. AP Invoices not fully paid with an invoice date more than 30 days ago) to ensure MyAssistant is looking for what you want



5. Specify whether the Task should run on a Schedule

6. Update the columns in the table at the bottom of the Email step -- this controls what Sage information is in the spreadsheet.



7. Create and save a spreadsheet template using the columns in the Email step.

8. Specify the recipients that should be informed when then Condition is met. An Email Directory can be used to send each recipient a list of only their items (e.g. send each Project Manager only their Jobs).

9. Confirm your settings in the Options step

Related Links

What to Send - Send a Spreadsheet

Email a Spreadsheet

Send Reports & Documents Overview

Providing each person reports and documents (e.g. pay stubs) with just their information is time consuming.   MyAssistant Tasks can be used to automatically generate and send AR Aging, cost and forecasting reports filtered for each project manager; employees their pay statements, vendors their electronic payment notices, and more. MyAssistant can also automatically generate and send almost any report on a Sage reports menu.

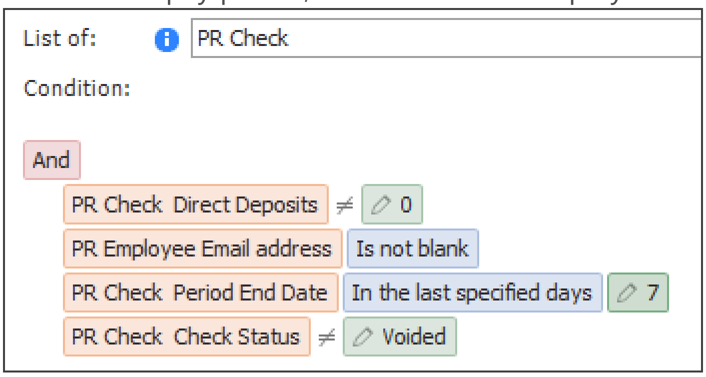
This section outlines how to create a Task that sends each recipient reports & documents with only their information:

1. Click the "New" button in the main MyAssistant window to create a new Task

2. Select that you want to send each person their report or document, then pick what information you want to use to create a mailing list (e.g. a mailing list based on PR Checks in order to send pay stubs).

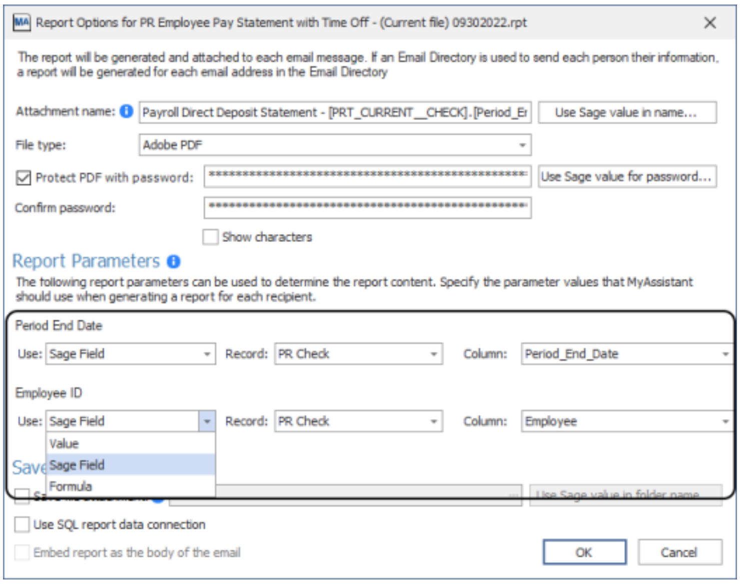
3. Use a prebuilt or create a new Condition to filter your mailing list to only the items that will give you your desired recipients (e.g. posted PR checks that use Direct Deposit)

4. Create or customize the Condition to ensure MyAssistant is looking for what you want (e.g. PR Checks that aren't voided with Direct Deposit amounts, are from the most recent pay period, and that are for employees with an email address)



5. Specify whether the Task should run on a Schedule

6. Attach your report(s) in the Email step; filling out the report prompts so its content is filtered for each email



7. Add your Email Directory to send each recipient only their documents (e.g. send each Employee only their pay statement).

8. Confirm your settings in the Options step

This section outlines how to create a Task that sends every recipient reports & documents with the same information:

1. Click the "New" button in the main MyAssistant window to create a new Task

2. Select that you want to send each person their report or document, then pick what information you want to use to create a mailing list (e.g. a mailing list based on PR Checks in order to send pay stubs).

3. Specify whether the Task should run on a Schedule

4. Attach your report(s) in the Email step and fill out any prompts

5. Specify the recipients that should be emailed the report(s)

6. Confirm your settings in the Options step

Related Links

What to Send – Reports & Documents

Email Each Person Their Reports & Documents

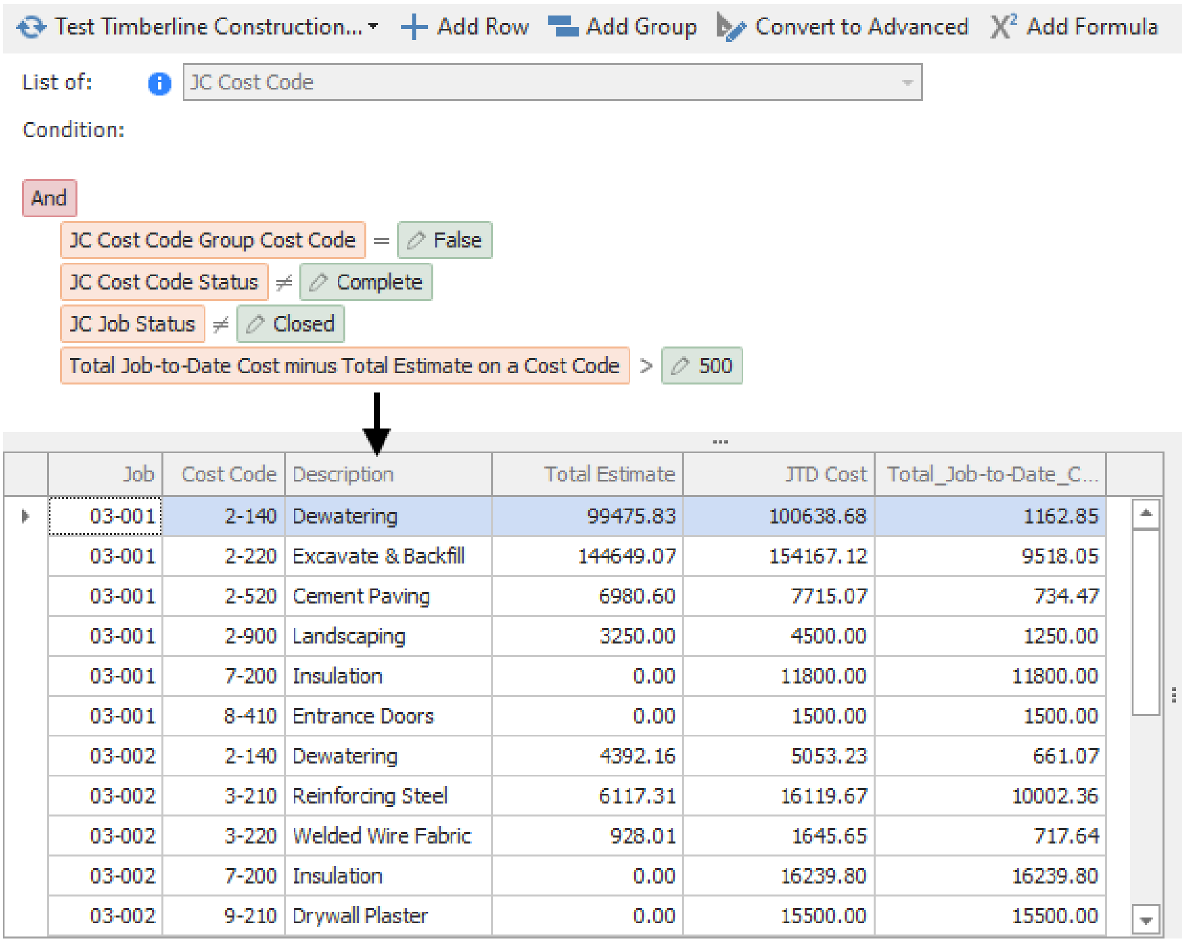
Task Setup

MyAssistant monitors for specific situations based on your information in Sage and automatically informs someone using "Tasks". MyAssistant Tasks are the individual processes that do things like send each employee their pay stubs, notify Vendors when they have expiring insurance, email Customers their Service Management invoices, and more. To do this, each MyAssistant Task has the following parts:

Condition: What MyAssistant should monitor in Sage and the criteria that information should meet

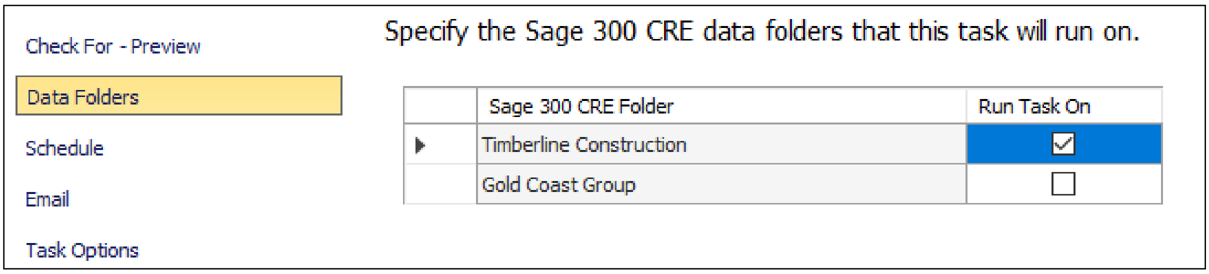
Example: This Condition is looking for JC Cost Codes, and the criteria are:

- Not a Group Cost Code
- Not a closed Cost Code
- Not on a Closed Job
- The "Job-to-Date" Costs on a Cost Code are more than $500 over the "Total Estimate"



Related: Conditions

Sage Data Folders: If MyAssistant is monitoring multiple Sage data folders, you'll choose which data folders the Task will look through.



Schedule: A schedule sets if and when a Task should automatically check Sage for information.

Recipients/Email Directories: Specifies who should be emailed when the Task finds information that matches the criteria in the "Condition". Recipients can be specified by entering their email addresses on the Task, or MyAssistant can look up who to notify based on the information found.

Email: Controls what the recipients are sent when the Condition's criteria are met. Emails can have attachments like:

- **Attached Reports or Documents:** Recipients can all be sent the same document with the same information, or each recipient can be sent only the information that pertains to them. For example: one Task can send all the manager the same cost report, while another Task can send each employee their weekly pay stub.

- **Spreadsheet Template:** Used to send an Excel spreadsheet attached to the email(s) sent by the Task. A spreadsheet template specifies what Sage information will be included in the spreadsheet and the spreadsheet's layout; regardless of how much information is found.

What to Send

To help users better understand the link between what they send from a Task and how it's set up, creating a new MyAssistant Task starts with identifying what you want to send.

What would you like to send: List of Notifications

- List of Notifications
- Spreadsheet
- Report attached as a PDF
- Each person their report or documents

This selection changes what you see in MyAssistant in order to help you understand what your choices mean.

When you click the dropdown, you can select from the following options:

List of Notifications: This option is for sending a list of information in the body of an email. Options include

AP Vendors missing a Contact 1 Email

Vendor	Name	Contact 1 Telephone
101	Alpha Insulation	(503)821-1176
104	AAA Insurance and Bonding	(503)242-5860
200	B & M Marble, Inc.	(503)242-1500
202	Beaverton Painting	(503)626-8484
206	Beaverton; City of	(503)626-2500
302	Commercial Pest Control	(503)626-5575
401	Dallas Tile & Carpet	(503)655-5252

Once this option has been selected, the next step will be to pick what the Task will send a list of in the body of the email.

Spreadsheet: Used to send an Excel spreadsheet attached to the email(s) sent by the Task.

Vendors with Expiring Insurance

				General Liability		Auto		Worker's Compensation		Umbrella	
Vendor	Name	Phone	Contact	Proof Req	Exp Date	Proof Req	Exp Date	Proof Req	Exp Date	Proof Req	Exp Date
100	A-1 Electric Company	(503)744-3200	Carlton; Rob	x	6/30/2016	x	10/1/2015	x	10/1/2015		12/31/2014
1000	Jackson Heating & A/C	(503)854-6663	Brown; Pete	x	6/1/2015			x		x	4/30/2015
101	Alpha Insulation	(503)821-1176	Elliott; Collin	x	12/1/2014	x	4/30/2014	x	2/28/2016		
102	Acme Door & Glass Distributors	(503)245-8162	Johnson; Bill	x	4/30/2016	x	4/14/2016	x	12/31/2016		
103	Ace Drywall	(503)858-3838	Ryan; Paul	x	4/30/2016	x	4/30/2015	x	6/14/2015		
1101	Kingston Plumbing	(503)289-5623	Turner; Laura	x	1/31/2016			x	3/31/2016		
1111	Tufnel Inc	503-555-1245	Nigel Tufnel		10/1/2016	x	1/29/2016				
1200	Larson's Hardware	(503)672-9327	Dalton; Chris			x	8/31/2015				
1201	Logan Sanitation	(503)745-6985				x	9/30/2015	x	4/30/2015		
1300	Marion Cnty Commercial Digging	(503)846-9972	Stevens; Parker	x	4/30/2016			x	10/31/2015		
1400	Northwest Landscaping	(503)242-1105	Bates; Lori					x	6/30/2015		

After selecting this option, the next step is to decide what you want one line per in your spreadsheet.

Report attached as a PDF: This is used to send reports where every recipient gets the same information.

Each person their report or documents: This option is used to send each recipient only their information. The next step after picking this option would be to identify what Sage information will be used to create a mailing list that will identify who needs to be emailed and who doesn't.

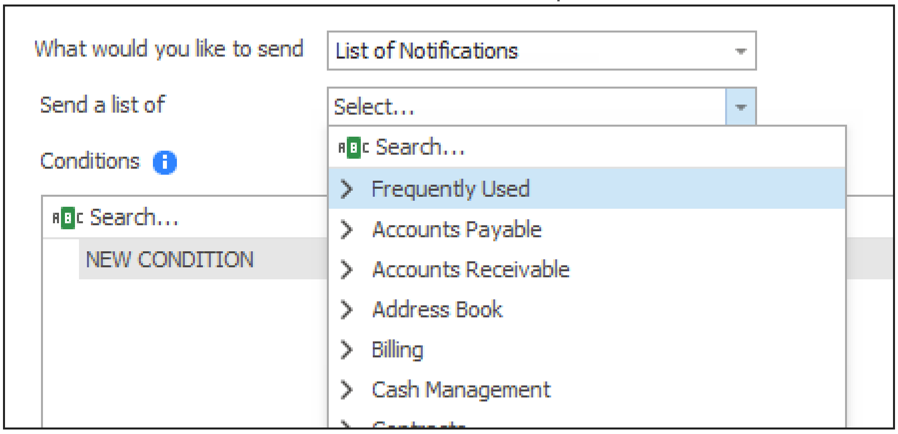
Send a List of Notifications

To send a list of information in an email like the one pictured below, select "List of Notifications" in the "What would you like to send" dropdown.


AP Vendors missing a Contact 1 Email

Vendor	Name	Contact 1 Telephone
101	Alpha Insulation	(503)821-1176
104	AAA Insurance and Bonding	(503)242-5860
200	B & M Marble, Inc.	(503)242-1500
202	Beaverton Painting	(503)626-8484
206	Beaverton; City of	(503)626-2500
302	Commercial Pest Control	(503)626-5575
401	Dallas Tile & Carpet	(503)655-5252

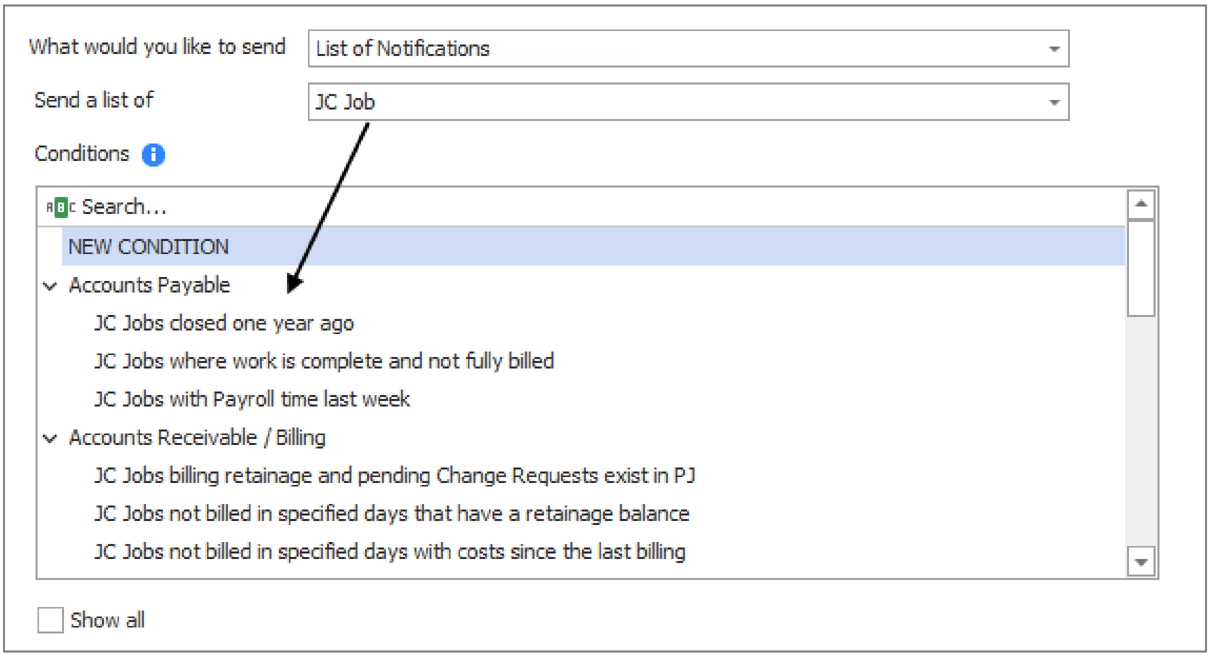
Next, click the field next to "Send a list of" and pick what Sage information you want to send in a list. For example, to send a list of Commitments recently set up in Sage, select "JC Commitment" from the "Send a list of" dropdown.



Tip: Use the Search at the top and the "Frequently Used" group to quickly find what you want to send.

You'll next select a **Condition**, which is the criteria that filters your list to only the items you want. MyAssistant comes with hundreds of "prebuilt" Conditions to customize, and the list will automatically filter to only those creating a list of the same items (e.g. Jobs, Commitments, etc.).

Example: If you chose to send a list of "JC Jobs", the list will show only Conditions that also create a list of Jobs:



Note: If you are activating a prebuilt Task or modifying a Task that has already been activated, you cannot change what you're sending a list of

Select a prebuilt Condition or "NEW CONDITION", then click **Next**. You'll then customize and preview your criteria in the Condition step.

Related Links

Send a List of Notifications Overview

Email a List of Notifications

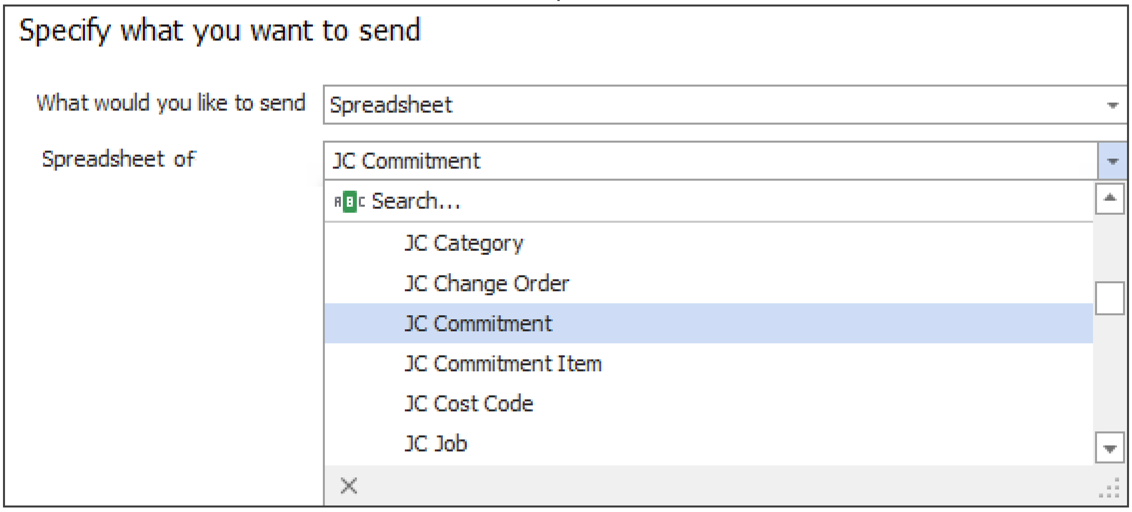
Send a Spreadsheet

To send a spreadsheet attached to an email, select "**Spreadsheet**" in the "What would you like to send" dropdown.

Vendors with Expiring Insurance

				General Liability		Auto		Worker's Compensation		Umbrella	
Vendor	Name	Phone	Contact	Proof Req	Exp Date	Proof Req	Exp Date	Proof Req	Exp Date	Proof Req	Exp Date
100	A-1 Electric Company	(503)744-3200	Carlton; Rob	x	6/30/2016	x	10/1/2015	x	10/1/2015		12/31/2014
1000	Jackson Heating & A/C	(503)854-6663	Brown; Pete	x	6/1/2015			x		x	4/30/2015
101	Alpha Insulation	(503)821-1176	Elliott; Collin	x	12/1/2014	x	4/30/2014	x	2/28/2016		
102	Acme Door & Glass Distributors	(503)245-8162	Johnson; Bill	x	4/30/2016	x	4/14/2016	x	12/31/2016		
103	Ace Drywall	(503)858-3838	Ryan; Paul	x	4/30/2016	x	4/30/2015	x	6/14/2015		
1101	Kingston Plumbing	(503)289-5623	Turner; Laura	x	1/31/2016			x	3/31/2016		
1111	Tufnel Inc	503-555-1245	Nigel Tufnel		10/1/2016	x	1/29/2016				
1200	Larson's Hardware	(503)672-9327	Dalton; Chris			x	8/31/2015				
1201	Logan Sanitation	(503)745-6985				x	9/30/2015	x	4/30/2015		
1300	Marion Cnty Commercial Digging	(503)846-9972	Stevens; Parker	x	4/30/2016			x	10/31/2015		
1400	Northwest Landscaping	(503)242-1105	Bates; Lori					x	6/30/2015		

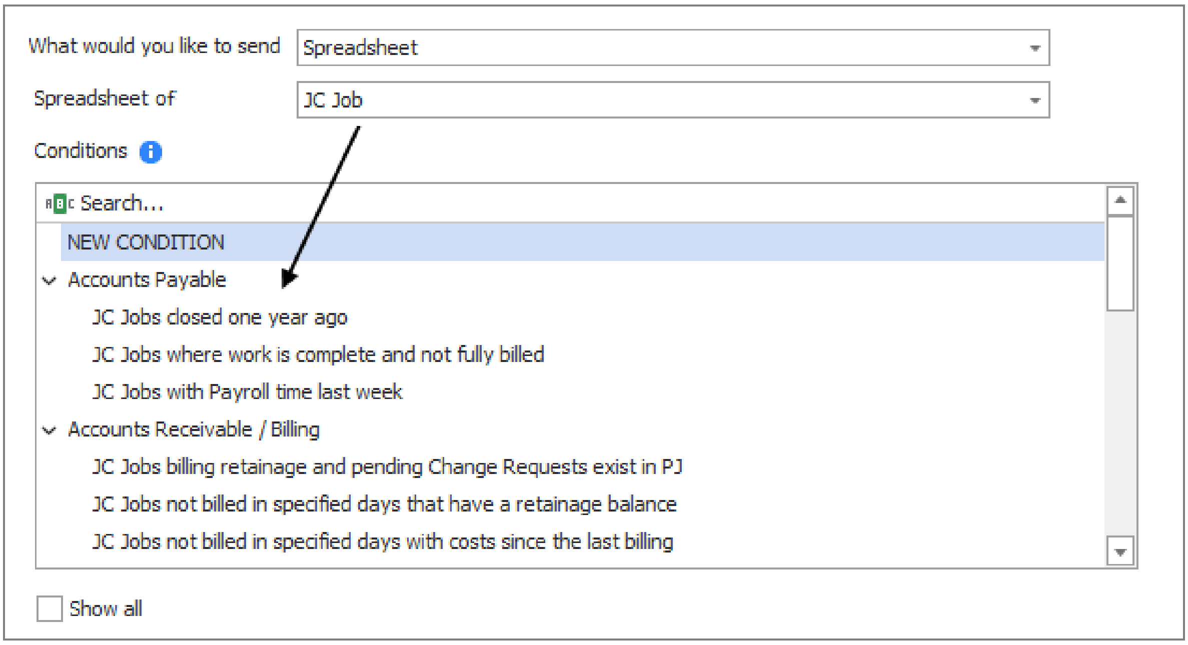
Next, click the field next to "Spreadsheet of" and pick what Sage information you want to send in a list. For example, to send a list of Commitments recently set up in Sage, select "JC Commitment" from the "Send a list of" dropdown.



Tip: Use the Search at the top and the "Frequently Used" group to quickly find what you want to send.

You'll next select a **Condition**, which is the criteria that filters your list to only the items you want in the spreadsheet. MyAssistant comes with hundreds of "prebuilt" Conditions to customize, and the list will automatically filter to only those creating a list of the same items (e.g. Jobs, Commitments, etc.).

Example: If you chose to send a spreadsheet of "JC Jobs", the list will show only Conditions that also create a list of Jobs:



Note: If you are activating a prebuilt Task or modifying a Task that has already been activated, you cannot change what you're sending a spreadsheet of

Select a prebuilt Condition or "NEW CONDITION", then click **Next**. You'll then customize and preview your criteria in the Condition step.

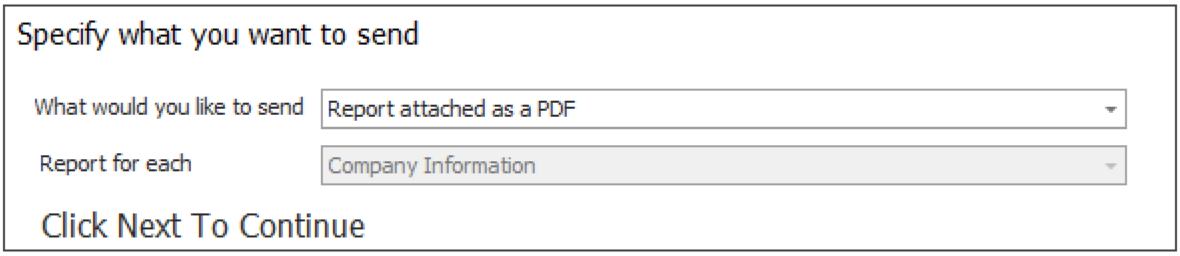
Related Links

Send a Spreadsheet Overview

Email a Spreadsheet

Send a Report as a PDF

Report attached as a PDF: This is used to send reports where the recipients are the same every time the Task is run, and every recipient gets the same information. If this option is selected, the Condition will be automatically selected and the next step will be scheduling the Task.



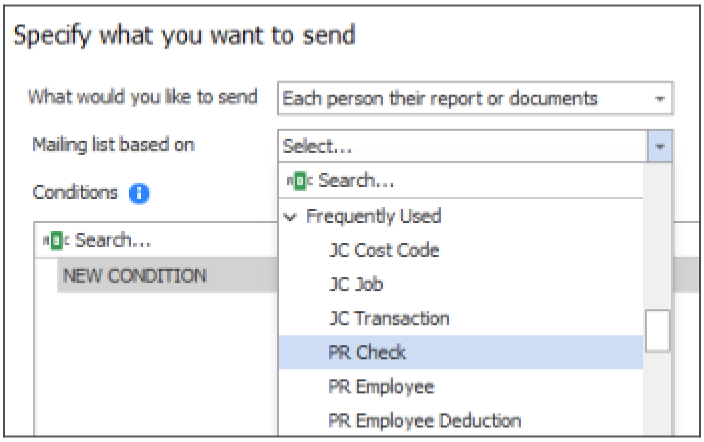
Related Links

Send Reports & Documents Overview

Each Person Their Report or Documents

Each person their report or documents: This option is used to send each recipient will only get their information. The next step after picking this option would be to identify what Sage information will be used to create a mailing list that will identify who needs to be emailed and who doesn't.

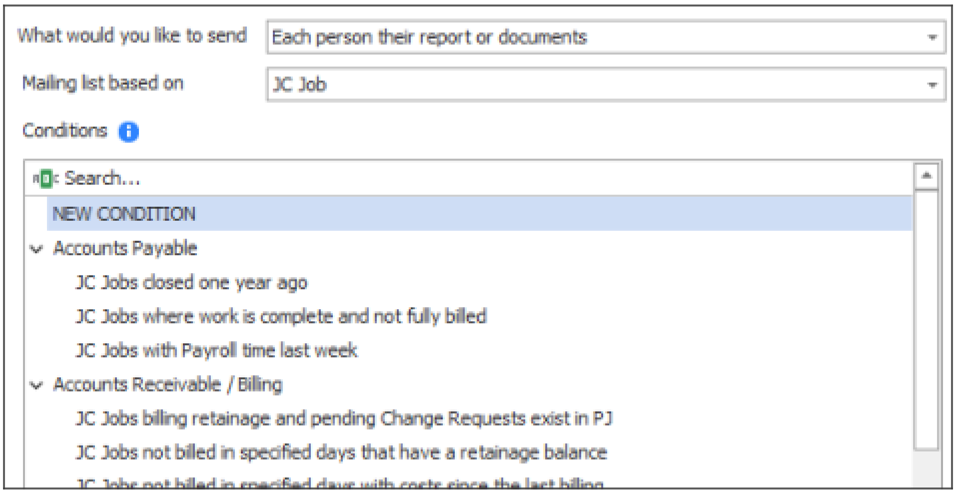
Click the field next to "Mailing list based on" and pick what Sage information you want to use. For example, to send each employee their pay statement, select "PR Check" to create a mailing list of who was paid in the most recent pay period.



Tip: Use the Search at the top and the "Frequently Used" group to quickly find what you want to send.

You'll next select a **Condition**, which is the criteria that filters your mailing list. MyAssistant comes with hundreds of "prebuilt" Conditions to customize, and the list will automatically filter to only those that can create a mailing list based on the same information (e.g. Jobs, Commitments, etc.).

Example: If you chose to send a list of "JC Jobs", the list will show only Conditions that also create a list of Jobs:



Note: If you are activating a prebuilt Task or modifying a Task that has already been activated, you cannot change what creating a mailing list based on

Select a prebuilt Condition or "NEW CONDITION", then click **Next**. You'll then customize and preview your criteria in the Condition step.

Related Links

Send Reports & Documents Overview

Send Each Person Their Information

Conditions

MyAssistant monitors for specific situations based on your information in Sage and automatically informs someone using "Tasks". The Condition is the part of a Task that controls what MyAssistant looking for in Sage (e.g. PR Checks, JC Jobs, AP Invoices, etc.). The Condition also is the criteria used to only find the specific items you want. Once a Task finds the information that meets the criteria set in the Condition, it will use that information to create the email(s) and any attachments sent by the Task. When running a Task to send each person only their information, the Condition will also help determine who should be emailed and who shouldn't.

You can customize a prebuilt Condition (or start with a new Condition) selected in the What to Send step of Task Setup.

The Condition is made up of one or more logical statements that are true or false. For example:

To See	MyAssistant Condition
Jobs that are over-budget	JC Jobs with a Total Estimate greater than the Job-to-date Costs
Subcontractors who don't have a signed contract	JC Commitments where the "Signed Received" box isn't checked and the Vendor's Type is "Subcontractor"
AP Invoices Coded to a JC Jost Code without an Estimate	AP Invoice Distributions where the associated JC Cost Code's "Total Estimate" is zero
Which employees should be sent a pay stub this pay period	PR Checks with a period end date in the last week and a Direct Deposit amount greater than zero

Condition Parts

Each line of a Condition contains the following pieces:

Sage field/MyAssistant Formula: The information from a Sage field or a MyAssistant Formula. Examples include:

- Employee's Email Address
- Invoice Date on an AR Invoice
- Last time a Job was billed

Operands: Used to compare the different values on a line. Examples include:

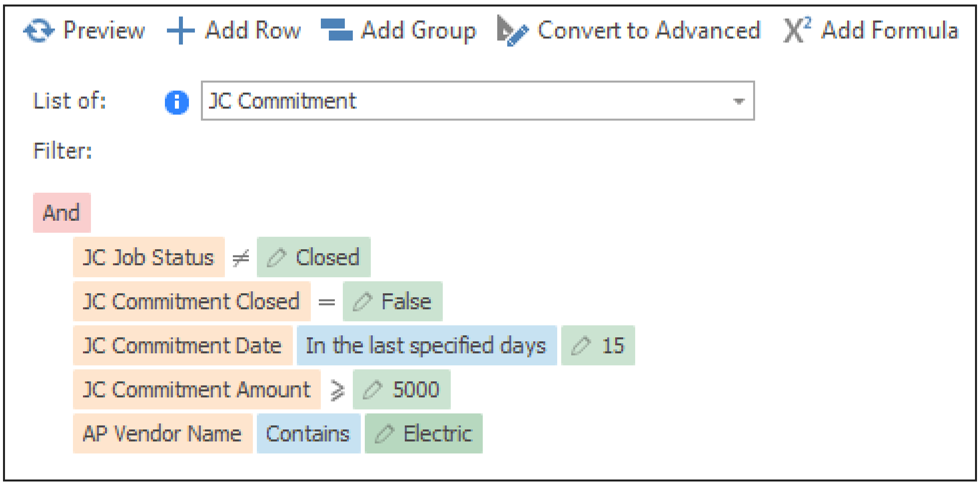
- Equals =
- Is more than specified days ago
- Is greater than >
- Contains
- Is blank

Related: All available operands

A specified value, Sage field or Formula: This is what's compared against the Sage field or MyAssistant Formula value in the line. This could be:

- $4,000
- 30 days
- Accounting Date on an Invoice
- Percent a category is over-budget

When put together, Condition rows look like the following:



Related: Building a Condition

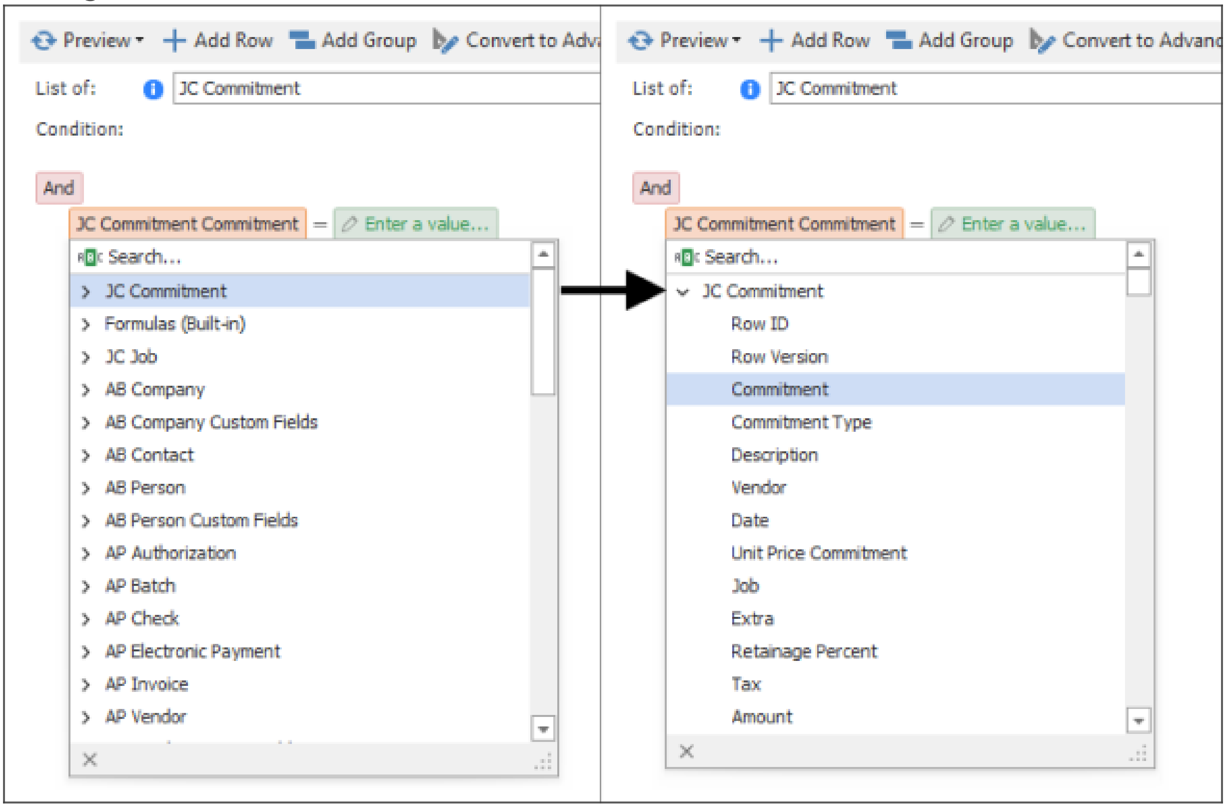
Building a Condition

The Condition on a Task is the criteria that filter the items you're looking for (e.g. PR Checks, JC Jobs, AP Invoices, etc.) to only those you want. A detailed explanation of Conditions can be found here.

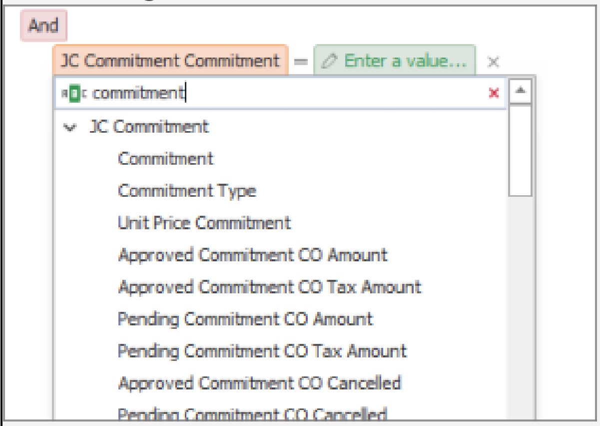
This section outlines how to create or update the criteria of a Condition:

Selecting the Sage Field / Formula

Click the Sage field or formula on the left side of the row to show a list of the Sage information and formulas available to select. Expand the group that matches what you're looking for, then select the field to use in the row:

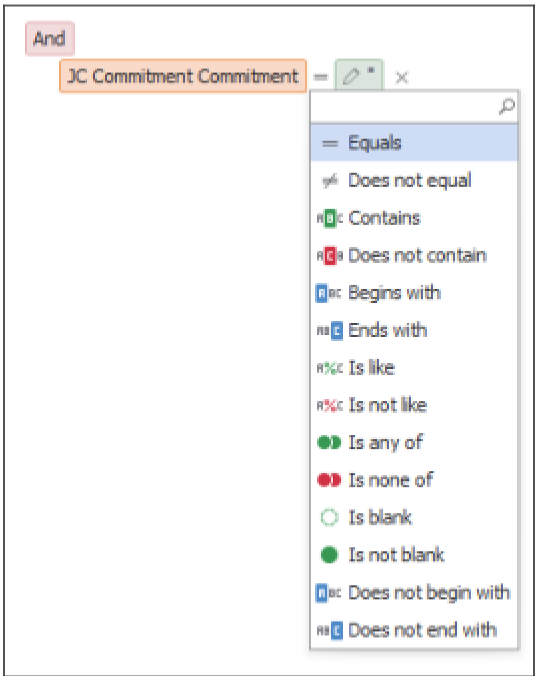


Tip: Use the search bar at the top of the Sage field list to quickly find the Sage field to use in the row:



Select the Operand

Click the "=", "begins with", or whatever symbol is between the Sage field or Formula and the space to put the value to check against. The list of available operands will change based on what kind of information is being looked up (i.e. text in a field, a number like a dollar amount, or a date)

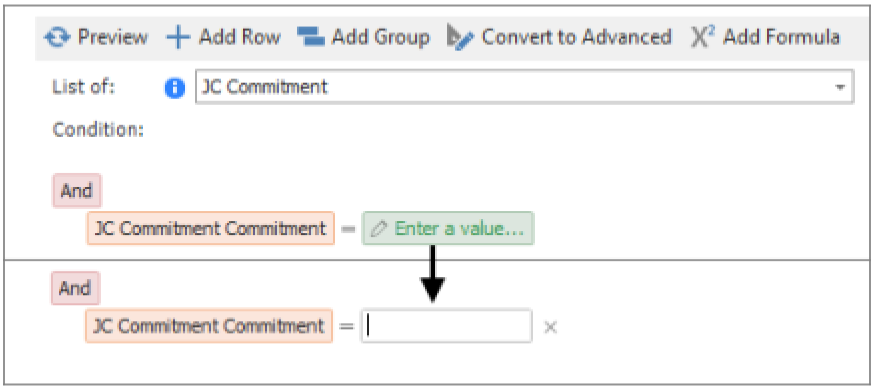


Related: All available operands

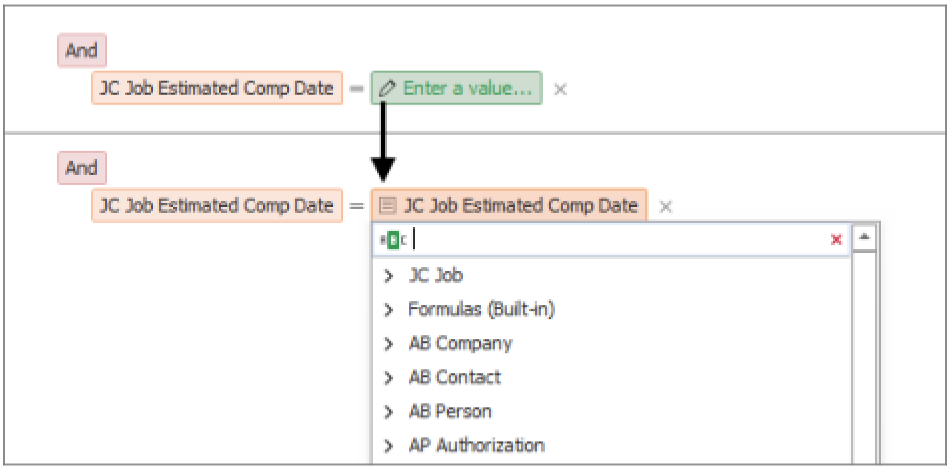
Specify the field or Enter a Value

Enter the value or select the Sage field or formula you want to compare against the first Sage field or formula selected.

Click "Enter a value" to type in or select the value to check against the field:



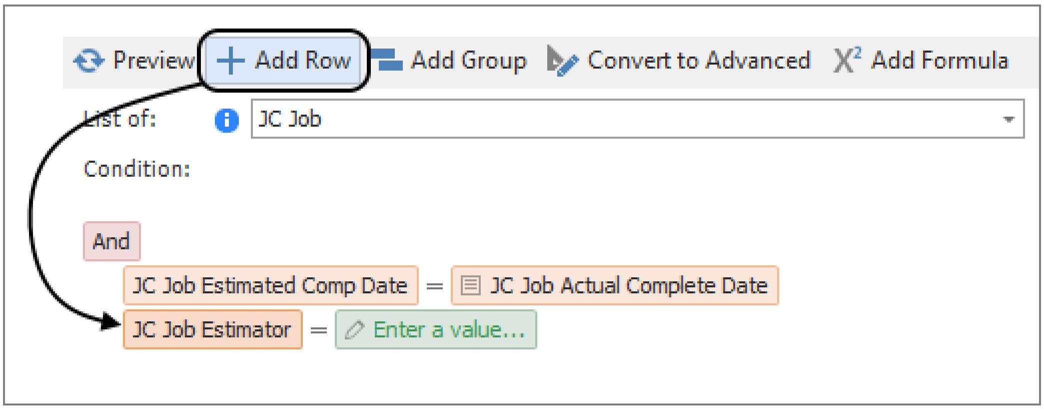
To select a Sage field or formula: click the pencil icon, click the field & choose the correct Sage field or formula from the list:



Add a row

Adding rows to a Condition add additional criteria that the information in Sage has to meet to be included in the Task.

To add a row to a Condition, click "Add Row" in the button bar at the top:



Use the previous steps to modify the newly added row

Add a group

When creating or modifying a Condition, you can add groups to combine or change optional and required criteria. For more information on Groups, click here.

Condition Groups

Task Conditions contain one or more Groups that determine whether all or some of the criteria need to be met. There are two types of Groups:

"AND" Groups: All criteria in the group must be met

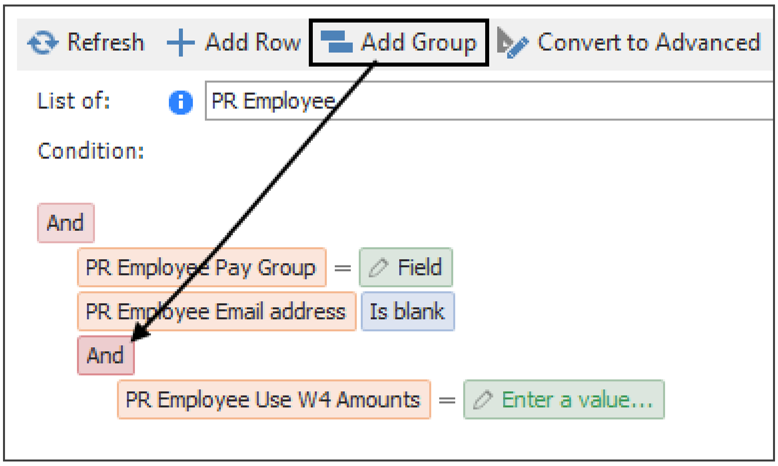
"OR" Groups: One of the criteria in the group must be met

For Example:

- Checking for current employees in multiple ways: An employee's Termination Date is blank, **or** their Termination Date is before the date entered in the Rehire Date field in PR Employee Setup
- Checking for insurance information that was never entered, is expired, **or** is expiring soon: The General Liability "Ins Proof Req" checkbox in AP Vendor Setup is checked, **and either** the insurance expiration date is blank **or** the expiration date is in the next 30 days or older

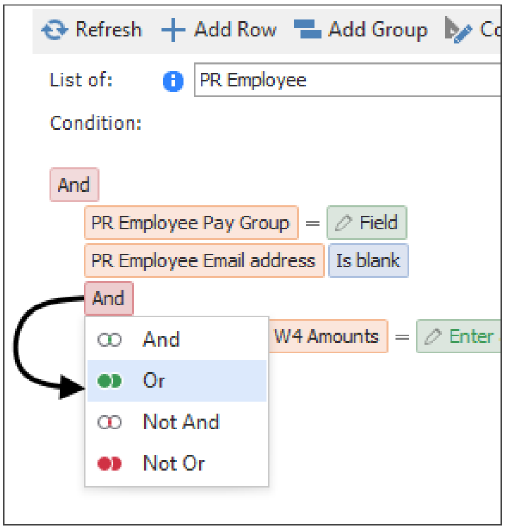
Add or Change Groups

Click "Add Group" at the top of the screen to add a group to the end of your Condition.



In addition to the group, the first line under the group is automatically added. You can change this line using the options outlined in Building a Condition.

To change a group, click the "AND" or the "OR" above the lines of the Condition that you want to change, then select what you want to change it to:



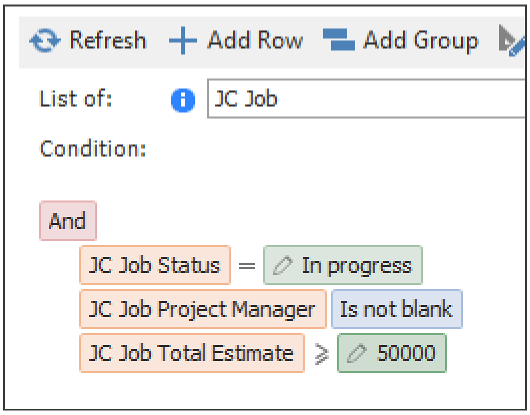
Tip: Add groups to the end of a Condition to help stay organized as to what criteria is falling under which group. It's technically possible (though not advised) to have criteria from an outer group under an inner group, but always putting groups at the end of your criteria ensures conditions are easy to read.

Understanding Groups

Criteria will always be indented under the group's heading, which most of the time will be an "AND" or an "OR" heading.

"AND" group only

If your condition only has several rows grouped under an "AND", the information being looked up in Sage must meet the criteria on every line in order to be included on an emails or attachments being sent by the Task:



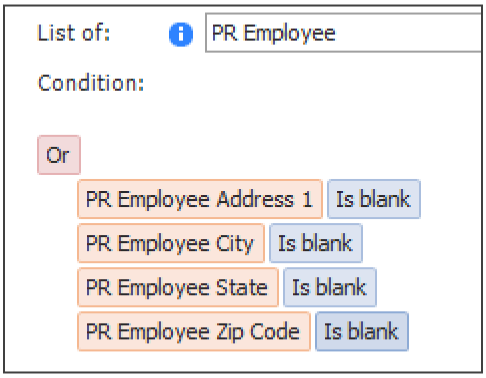
What this means: This Condition is only looking for Jobs in Sage that meet all of its criteria:

- The Job's Status field is "In progress", **and**
- The Project Manager field on the Job is not blank, **and**
- The Total Estimate on the Job is greater than or equal to $50,000

If a Job did not meet all criteria, it would not be included in any emails or attachments sent by the Task.

"OR" group only

If your condition only has several rows grouped under an "OR", the information being looked up in Sage needs meet the criteria at least one of the lines in order to be included on an emails or attachments being sent by the Task:



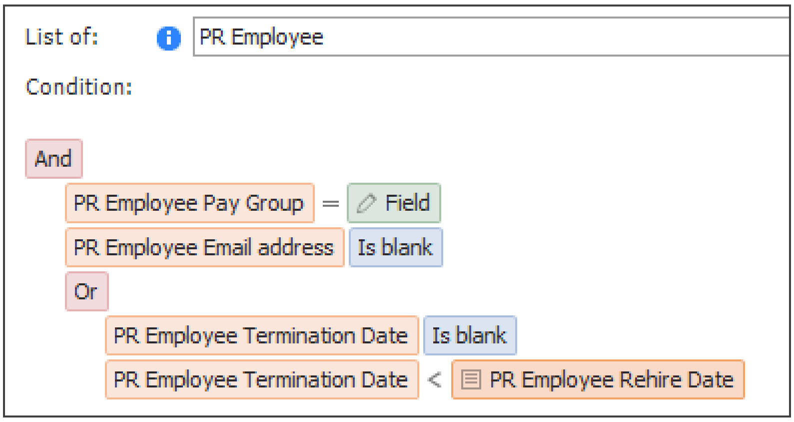
What this means: This Condition is looking for Employees missing address information in Payroll. In this case, the Condition wants to find any employees that meet one or more of the following criteria:

- The "Address 1" field in Employee Setup is blank, **or**
- The "City" field in Employee Setup is blank, **or**
- The "State" field in Employee Setup is blank, **or**
- The "Zip Code" field in Employee Setup is blank

Only Employees that don't meet any of the criteria will be excluded from the emails or attachments sent by the Task.

"AND" group with an "OR" group underneath

Sometimes a condition will have several required criteria and some optional criteria, meaning you want to use both an "AND" and "OR" grouping. When you have an "OR" underneath an "AND" group, it means all the criteria outside the "OR" must be met, and at least one of the "OR" criteria:



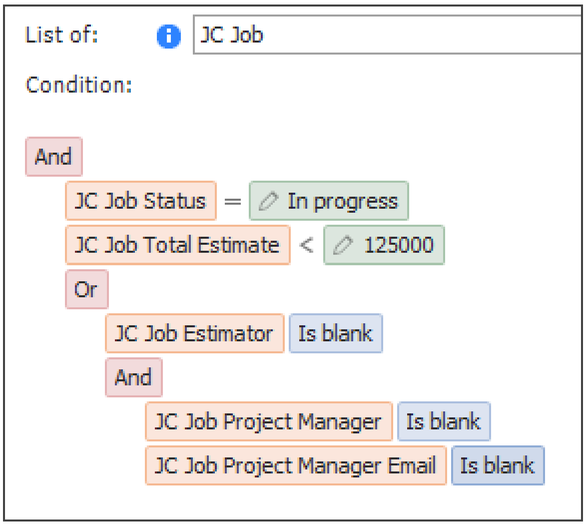
What this means: This Condition is looking for specific Employees in Payroll. To be included in any emails or attachments sent by MyAssistant, an Employee must meet the first two criteria, and at least one of the criteria under the "OR":

- An Employee is in the "Field" pay group, **and**
- The "Email Address" field in Employee Setup is blank, **and**
- **Either**
    - The "Termination Date" field in employee setup is blank, **or**
    - The "Termination Date" field is a date before the date in the "Rehire Date" field

Employees who do not meet the first two lines of the criteria **and** at least one of the criteria under the "OR" will be excluded in any emails or attachments sent by the Task.

Multiple "AND" and "OR" groups underneath one another

As you get more comfortable with creating your own Conditions, you can have multiple groups underneath one another. When you have multiple groups, it's important to remember that all the criteria that are indented at the same level are what fall under that group:



What this means: This Condition is looking for JC Jobs. To be included in any emails or attachments sent by MyAssistant, a Job must meet the first two criteria, and at least one of the criteria under the "OR". In this case, the second "OR" option actually has two criteria that both must be met:

- The Job's status is "In progress", **and**
- The Total Estimate on the Job is less than $125,000; **and**
- **Either**
    - **Option 1:** The "Estimator" field on the Job is blank, **or**
    - **Option 2:**
        - The "Project Manager" field on the Job is blank, **and**
        - The "Project Manager Email" field on the Job is blank

Operands

The list of available operands for a row in a Condition will change depending on the type of information being looked up. Operands are selected as part of building a Condition.

Text Operands
These operands are available when checking text entered in Sage. Common examples include AP Vendor ID, AR Customer Name, PR Employee Number, and JC Job Description.

Operand	Definition	Example
= Equals	The text from the field or formula to the left of the operand matches the text entered or Sage field selected on the right	To see all Subcontracts: JC Commitment Commitment Type = Subcontract
≠ Does not equal	The text from the field or formula to the left of the operand doesn't match the text on the right	To see Jobs where the Project Manager isn't John Smith: JC Job Project Manager ≠ John Smith
ABC Contains	The text to the right of the operand is somewhere in the text from the field on the left	To see all Commitments where "wiring" is somewhere in the Commitment's Description: JC Commitment Description Contains Wiring
ACB Does not contain	The text to the right of the operand is not anywhere in the text from the field on the left	To see AR Customers where "University" is not in their name: AR Customer Name Does not contain University
ABC Begins with	The text from the field or formula on the left starts with the text entered or Sage field selected on the right	To see all Jobs that begin with the "23": JC Job Job Begins with 23
ABC Ends with	The text from the field or formula on the left ends with the text entered or Sage field selected on the right	To see all Commitments on Jobs that end in "100": JC Commitment Job Ends with 100
A%C Is like	The text to the right of the operand is somewhere in the text from the field on the left	To see all Employees that have "Admin" somewhere in their title: PR Employee Title Is like Admin
A%C Is not like	The text to the right of the operand is not anywhere in the text from the field on the left	To see all Jobs where "NYC" is not in the description: JC Job Description Is not like NYC
Is any of	The text from the field or formula to the left of the operand matches one of the options on the right	To see Customers with an ID of "GA","OHSU", "TT" or "TC": AR Customer Customer Is any of GA OHSU TT TC
Is none of	The text from the field or formula to the left of the operand doesn't match any of the options on the right	To see Employees that don't have an ID of 100, 101 or 103: PR Employee Employee Is none of 100 101 103
Is blank	The field or formula specified is blank	To see Employees with no Email Addresses: PR Employee Email address Is blank
Is not blank	The text field is not blank	To see Employees with Email Addresses in PR Employee Setup: PR Employee Email address Is not blank
ABC Does not begin with	The text from the field or formula to the left of the operand doesn't begin with the text entered or Sage field selected on the right	To see Jobs with IDs that do not begin with "XX": JC Job Job Does not begin with XX

Does not end with	The text from the field or formula to the left of the operand does not end with the text entered or Sage field selected on the right	To see Cost Codes that do not end in "000": JC Cost Code Cost Code · Does not end with · 000

Number Operands

These operands are available when checking numbers entered in Sage. Common examples include the Total Estimate on a Job, the Net Pay amount on a PR Check, the number of Days Before Due entered in AR Customer Setup, and the number Payment Days in AP Vendor Setup.

Operand	Definition	Example
= Equals	The number from the field or formula to the left of the operand equals the number entered or Sage field selected on the right	To see AP Invoice Distributions with $0 paid: AP Distribution Amount Paid = 0
≠ Does not equal	The number from the field or formula to the left of the operand doesn't equal the number entered or Sage field selected on the right	To see Commitments where the amount invoiced isn't $0: Amount invoiced on a Subcontract or PO ≠ 0
> Is greater than	The number from the field or formula to the left of the operand is greater than the number entered or Sage field selected on the right	To see Cost Codes that are over-budget by more than five percent: Percent a Cost Code is over-budget > 5
≥ Is greater than or equal to	The number from the field or formula to the left of the operand is greater than or equal to the number entered or Sage field selected on the right	To see Commitments that are $500 or more: JC Commitment Amount ≥ 500
< Is less than	The number from the field or formula to the left of the operand is less than the number entered or Sage field selected on the right	To see Cost Codes with revised Contract amounts less than $1,000: JC Cost Code Revised Scheduled Value < 1000
≤ Is less than or equal to	The number from the field or formula to the left of the operand is less than or equal to the number entered or Sage field selected on the right	To see AP Invoices with $1,500 or less open on them: Open amount on an AP Invoice ≤ 1500
[...) Is in range	The number from the field or formula to the left of the operand is between the two numbers specified on the right	To see Jobs with Total Estimates between $100,000 and $200,000: JC Job Total Estimate · Is in range · from 100000 to 20
[...) Is not in range	The number on the left is not between in the two numbers on the right	To see Jobs with Revised Contracts not between $50,000 and $100,000: JC Job Revised Contract Amount · Is not in range · 50000 and 100000
[...] Is between	The number from the field or formula to the left of the operand is between the two numbers specified on the right	To see Bank Accounts whose balances changed between $2,500 and $5,000 yesterday: Amount a Bank balance changed yesterday · Is between · 2500 and 5000

Is any of	The text from the field or formula to the left of the operand matches one of the numbers on the right	To see AP checks numbered 100251, 100257, 100275 or 100301: AP Check Check | Is any of | 100251 | 100257 | 100275 | 100301
Is none of	The text from the field or formula to the left of the operand doesn't match any of the numbers on the right	To see Credit Card Payments with a Payment ID other than 200150 or 200188: AP Credit Card Payment Payment ID | Is none of | 200150 | 200188

Date Operands

These operands are available when checking the value of a date field. Examples include the Period End Date on a PR Check, the Date Issued on a Lien Waiver, the Invoice Date on an SM Invoice, and the Accounting Date on a JC Transaction.

Operand	Definition	Example
Is today	The date from the field or formula to the left of the operand matches the day the Task is run	To see AP Electronic Payments with a Payment Date matching the day the Task runs: AP Electronic Payment Payment Date | Is today
Is before today	The date from the field or formula to the left of the operand is before the day the Task is run	To see Subcontracts and Purchase Orders (i.e. Commitments) with a date prior to the day the Task runs: JC Commitment Date | Is before today
Is after today	The date from the field or formula to the left of the operand is after the day the Task is run	To see AP Invoices with a "Due Back Date" that is after the day the Task runs: AP Invoice Due Back Date | Is after today
7 In the next specified days	The date from the field or formula to the left of the operand is between the day the Task runs and the number of days entered in the future	To see AP invoices with a discount date in the 15 days after the date the Task is run: AP Invoice Discount Date | In the next specified days | 15
7 In the last specified days	The date from the field or formula to the left of the operand is between the day the Task runs and the number of days entered in the past	To see Transactions with a date in the 7 days prior to the date the Task ran: JC Transaction Transaction Date | In the last specified days | 7
31 Is more than specified days in the future	The date from the field or formula to the left of the operand is further in the future than the day the Task runs plus the number of days entered	To see Jobs where the Estimated Completed Date is more than 90 days after the day the Task ran: JC Job Estimated Comp Date | Is more than specified days in the future | 90
31 Is more than specified days ago	The date from the field or formula to the left of the operand is further in the past than the day the Task runs minus the number of days entered	To see AP Invoices dated more than 30 days before the date the Task ran: AP Invoice Invoice Date | Is more than specified days ago | 30
In the last specified days or newer	The date from the field or formula to the left of the operand is after the date the Task ran minus the number of days entered or in the future	To see PR Checks with Period End Dates in the 6 days before the Task ran, the same day the Task runs, or in the future: PR Check Period End Date | In the last specified days or newer | 6

In the next specified days or older	The date from the field or formula to the left of the operand is after the date the Task ran minus the number of days entered or in the past	To see Vendors with Worker's Comp Insurance expiring in the 30 days after the Task runs, the same day the Task runs, or in the past: AP Vendor Work Comp Expir Dt In the next specified days or older 30
[...] Is between	The date from the field or formula to the left of the operand is between the two dates entered or Sage fields selected on the right	To see Jobs with Estimated Completion Dates between 6/30/2022 and 12/31/2022: JC Job Estimated Comp Date Is between 6/30/2022 and 12/31/2022
Is beyond this year	The date from the field or formula to the left of the operand is sometime in the calendar year after the date when the Task is run	To see PR Checks dated for the calendar year after the day the Task runs: PR Check Check Date Is beyond this year
= Equals	The date from the field or formula to the left of the operand matches the date entered or Sage field selected on the right	To see Vendors whose General Liability Insurance will expire on 12/31/2022: AP Vendor GL Ins Expiration Dt = 12/31/2022
≠ Does not equal	The date from the field or formula to the left of the operand doesn't match the date entered or Sage field selected on the right	To see AP Invoices where the Invoice Date doesn't match the Accounting Date: AP Invoice Invoice Date ≠ AP Invoice Accounting Date
> Is greater than	The date from the field or formula to the left of the operand is after the date entered or Sage field selected on the right	To see Jobs where the Last Cost Update was after the last time the Job was billed: JC Job Last Cost Update > Last time a Job was billed
≥ Is greater than or equal to	The date from the field or formula to the left of the operand is the same day as or later than the date entered or field selected on the right	To see PR Checks with a Period End Date the same day or after the Check Date: PR Check Period End Date ≥ PR Check Check Date
< Is less than	The date from the field or formula to the left of the operand is before the date entered or field selected on the right	To see Subcontracts and Purchase Orders (i.e. Commitments) with dates prior to the date when a signed contract was received: JC Commitment Date < JC Commitment Contract Signed Date
≤ Is less than or equal to	The date from the field or formula to the left of the operand is the same day as or before the date entered or field selected on the right	To see Jobs where the Actual Completion Date is the same day or prior to its Last Cost Update: JC Job Actual Complete Date ≤ JC Job Last Cost Update
Is blank	The date from the field or formula to the left of the operand is blank	To see AP Vendors where the Expiration Date for their Worker's Comp insurance has not been entered in Sage: AP Vendor Work Comp Expir Dt Is blank
Is not blank	The date from the field or formula to the left of the operand is i.e., not blank	To see Jobs that have had overtime and when they had it: Last time a Job had overtime Is not blank
[...] Is in date range	The date from the field or formula to the left of the operand is between the two dates entered or Sage fields selected on the right	To see Credit Card payments dated between 12/1/2022 and 12/31/2022: AP Credit Card Payment Payment Date Is in date range from 12/1/2022 to 12/31/2022

Is not in date range	The date from the field or formula to the left of the operand is not between the two dates entered or Sage fields selected on the right	To see Vendors whose most recent invoices were not between 1/1/2022 and 12/31/2022: AP Vendor Last Inv Date · Is not in date range · 1/1/2022 and 12/31/2022
Is later this year	The date from the field or formula to the left of the operand is after the day the Task runs but still in the same year	To see Cost Codes with Estimated Completion Dates later in the same year the Task was run: JC Cost Code Estimated Comp Date · Is later this year
Is in the next 30 days	The date from the field or formula to the left of the operand is between the day the Task runs and 30 days in the future	To see Employees who have an employment anniversary in the next 30 days: Hire-rehire anniversary for an Employee · Is in the next 30 days
Is in the next week	The date from the field or formula to the left of the operand is between the day the Task runs and 7 days in the future	To see Subcontracts and Purchase Orders (i.e. Commitments) with a Delivery Date in the next 7 days after the Task is run: JC Commitment Delivery Date · Is in the next week
Is in this year	The date from the field or formula to the left of the operand is in the year the Task runs	To see Vendors who have been cut a check in the year the Task is run: AP Vendor Last Check Date · Is in this year
Is in this month	The date from the field or formula to the left of the operand is in the month the Task runs	To see Jobs that last had a billing in the month the Task is run: Last time a Job was billed · Is in this month
Is in the last week	The date from the field or formula to the left of the operand is between the day the Task runs and 7 days prior	To see PR Checks with a Check Date in the last 7 days: PR Check Check Date · Is in the last week
Is in the last 30 days	The date from the field or formula to the left of the operand is between the day the Task runs and 30 days prior	To see AP Invoices with an Accounting Date in the last 30 days: AP Invoice Accounting Date · Is in the last 30 days
Is earlier this year	The date from the field or formula to the left of the operand is before the day the Task runs but still in the same year	To Employees who were hired earlier in the year the Task runs: PR Employee Hire Date · Is earlier this year
Is prior to this year	The date from the field or formula to the left of the operand is from before the calendar year when the Task was run	To see Subcontracts and Purchase Orders (i.e. Commitments) with a Last Check Date from a year before to the year the Task is run: JC Commitment Last Check Date · Is prior to this year
Is same day	The date from the field or formula to the left of the operand matches the date entered or Sage field selected on the right	To see AP Invoices where the Invoice Date is the same day as the Payment Date: AP Invoice Invoice Date · Is same day · AP Invoice Payment Date
Is this month	The date from the field or formula to the left of the operand is any day in the month the Task was run	To see AP Electronic Payments made in the same month the Task is run: AP Electronic Payment Payment Date · Is this month
Is this week	The date from the field or formula to the left of the operand is any day in the week the Task is run	To see Jobs with an Actual Start Date in the same week the Task is run: JC Job Actual Start Date · Is this week

Is this year	The date from the field or formula to the left of the operand is any day in the calendar year the Task is run	To see PM Leases with an Actual End Date in the same year the Task is run: PM Lease Actual Lease End / Is this year
Is next month	The date from the field or formula to the left of the operand is in the month after the month the Task is run	To see Vendors with Auto Insurance expiring in the month after the month the Task is run: AP Vendor Auto Ins Expir Dt / Is next month
Is next year	The date from the field or formula to the left of the operand is in the year after the year the Task is run	To see Subcontracts and Purchase Orders (i.e. Commitments) scheduled to start in the year after when the Task is run: JC Commitment Scheduled Start Date / Is next year
Is last month	The date from the field or formula to the left of the operand is in the month before the month the Task is run	To see AP Checks cut in the month before when the Task is run: AP Check Check Date / Is last month
Is last year	The date from the field or formula to the left of the operand is in the year before the year the Task is run	To see Employees terminated in the year before when the Task is run: PR Employee Termination Date / Is last year
Is the year-to-date period	The date from the field or formula to the left of the operand is between the i.e., day the Task runs and the beginning of the year	To see AP Invoices entered from the beginning of the year up to when the Task is run: AP Invoice Invoice Date / Is the year-to-date period
Is January	The date from the field or formula to the left of the operand is in the month of January in any year	To see Employees with a birthday in January: PR Employee Birth Date / Is January
Is February	The date from the field or formula to the left of the operand is in the month of February in any year	To see Employees that were hired in the month of February: PR Employee Hire Date / Is February
Is March	The date from the field or formula to the left of the operand is in the month of March in any year	To see Employees with a birthday in March: PR Employee Birth Date / Is March
Is April	The date from the field or formula to the left of the operand is in the month of April in any year	To see Employees that were rehired in the month of April: PR Employee Rehire Date / Is April
Is May	The date from the field or formula to the left of the operand is in the month of May in any year	To see Employees with a birthday in May: PR Employee Birth Date / Is May
Is June	The date from the field or formula to the left of the operand is in the month of June in any year	To see Employees with a birthday in June: PR Employee Birth Date / Is June
Is July	The date from the field or formula to the left of the operand is in the month of July in any year	To see Employees that were hired in the month of July: PR Employee Hire Date / Is July
Is August	The date from the field or formula to the left of the operand is in the month of August in any year	To see Employees with a birthday in August: PR Employee Birth Date / Is August

Is September	The date from the field or formula to the left of the operand is in the month of September in any year	To see Jobs completed in the month of September: JC Job Actual Complete Date Is September
Is October	The date from the field or formula to the left of the operand is in the month of October in any year	To see Employees terminated in the month of in October: PR Employee Termination Date Is October
Is November	The date from the field or formula to the left of the operand is in the month of November in any year	To see Employees with a birthday in November: PR Employee Birth Date Is November
Is December	The date from the field or formula to the left of the operand is in the month of December in any year	To see Employees with a birthday in December: PR Employee Birth Date Is December

MyAssistant Formulas

Sometimes on a Task you may want to see something like:

- A sum (e.g. the sum of open AP Invoices for a Vendor)
- Math equations or date math (e.g. a Job's remaining budget by subtracting Job-to-Date cost from the Total Estimate)
- Looking up information not directly related to what is being found by a Task (e.g. see the last time a Job was billed by looking at JC Transactions)
- ....and more

These can all be done with what are called MyAssistant Formulas. MyAssistant Formulas are advanced ways to look up, calculate or summarize information in Sage in order to use it in a Task. Formulas can be used in several places throughout Task Setup, including (but not limited to):

- On a line in a Condition to filter what information is found by Task
- In the prompt field of an attached report that will change its contents
- In an email subject line or message body to provide additional information

Using MyAssistant Formulas in Conditions

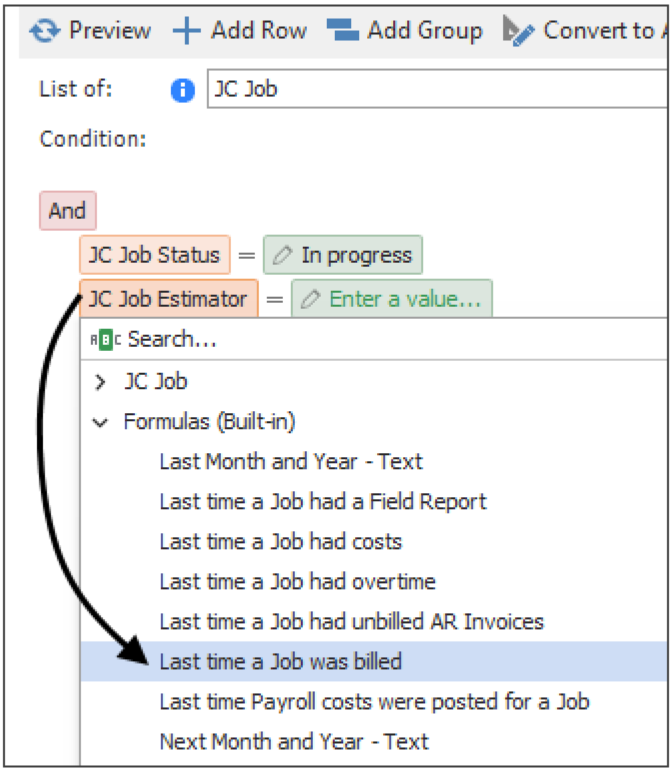
Using MyAssistant formulas in a Task Condition lets you use filter what's found by a MyAssistant Task in a way you may not have previously known was possible/how to do it. Examples of formulas you can use in a Task Condition include:

- Sum of open AR Invoices for a Customer
- Percent a Cost Code is over-budget
- Last time a Job had overtime
- Number of different Jobs on a Contract
- Sum of all cost transactions from this month for a Job
- Open amount on an AP Invoice

Using a MyAssistant Formula in a Condition criteria lets you use potentially more complex criteria on a single line to find the Sage information you want.

Add a Formula to a Condition

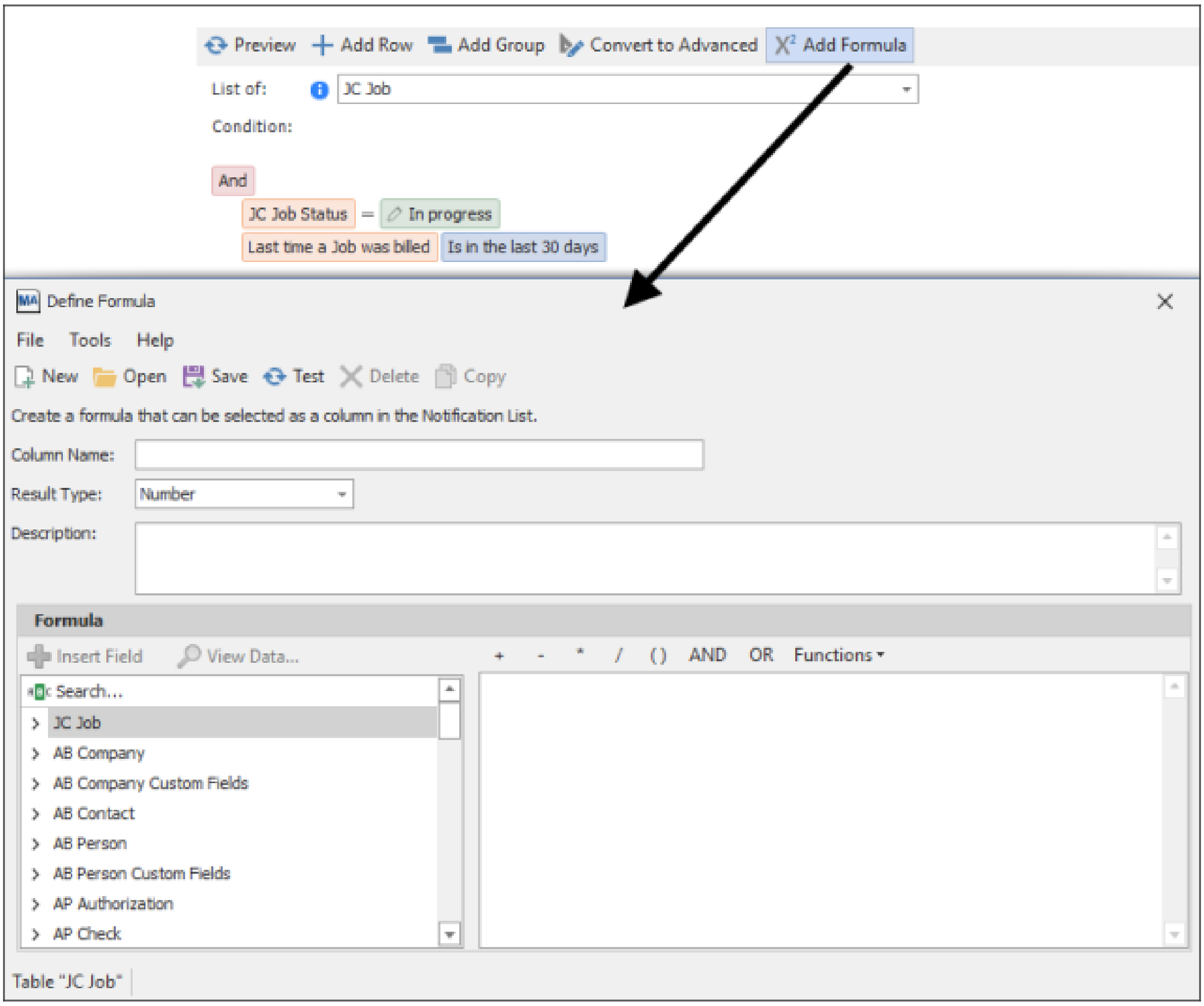
When building a Condition in Task Setup, you can add a Formula to a row by clicking the Sage field or formula on the left side of the row. Next, expand the "Formulas (Built-In)" or "Formulas (Owner)" group (depending on who created the formula) and select the formula to use in the row:



After selecting the formula to use, select the appropriate operand and Sage field or number/text to check against

Creating your own MyAssistant Formula

To create your own formula to use on a Condition, click "Add Formula" in the button bar:



Select if you want the Formula to give you a number, text or a date; name the formula and create your criteria. When finished, click "Save" and close the window.

Important: When you create a MyAssistant Formula, it will be linked to whatever information the Task is looking up. For example: if you create a new Formula on a Task that is sending a list of JC Jobs, the Formula will be linked to the JC Job record in Sage. This means you will only be able to use this Formula on Tasks that can access JC Jobs.

Advanced Conditions

Advanced Conditions define what a Task is looking for in two parts: the Check All record and the Condition Expression.

The Check All record is what you want a list of; i.e. vendors, jobs, invoices, etc.

The Condition Expression is what you are looking for in that list. For example: Vendors with expiring insurance, Jobs that haven't been billed in 40 days, or Customers with a balance over a certain dollar amount.

MyAssistant comes with numerous Conditions that are predefined and ready to use in Tasks. To access these Conditions, go to **File > Define Conditions**. From the Define Condition dialog you can open the predefined Conditions and make copies so that you can make changes, or you can write your own conditions. There are also examples that show how to use various functions. Click here for more information on writing your own Condition.

Related Topics

Creating a New Condition

Functions

How to Read a Condition

Copying Conditions

Editing Conditions

Deleting Conditions

Learning Resources for Conditions

Selecting Conditions

Testing Conditions

Understanding Conditions

MyAssistant Conditions define the situations you like monitored. The MyAssistant software comes with many prebuilt Conditions that can be used as-is or copied and modified. The following outlines how to read or interpret a condition to determine if it will meet your needs.

A condition has two parts:

- Which Sage 300 CRE database records will be checked (Check All)
- What is checked for each record (Condition Expression)

Check All

The first step in determining if a condition will meet your needs is to check the Sage 300 CRE record specified in the Check All field.

When a condition is run, MyAssistant performs the test specified in the Condition Expression for each occurrence of the Sage 300 CRE database record specified in the Check All field. A notification is created when the test is true. For example, if JC Job is select in the Check All field, MyAssistant will execute the test specified in the Condition Expression and create one notification for each job that meets the condition.

Condition Expression

The Condition Expression defines what is tested when the condition runs. The Condition Expression can be one or more logic statements that result in true or false. A logic statement can contain Sage 300 CRE database fields, specified values, functions and mathematical operands. Each logic statement is separated with an AND or OR operand and can be grouped together with parenthesis. The Condition Expression is reviewed by stepping through each logic statement.

The following may be included in the Condition Expression:

- Sage 300 CRE database fields – Sage 300 CRE database record / field names are surrounded with double quotes. They appear as "Record"."Field"; for example: "APM_MASTER__INVOICE"."Invoice_Date".
- Specified Values – Specified values are formatted based the type of data. Text values are specified with single quotes, dates are specified with single quotes in the format 'YYYY-MM-DD', and numbers do not use any quotes or other symbols.
- Functions – Functions include things such as CURDATE() to specify today's date and IS NULL as test for a blank date. See the Function list for a definition of each available function.

The following are a few sample logic statements that use Sage 300 CRE fields, functions, mathematical operators and specified values:

This tests for the type being equal to Subcontractor. Use single quotes to specify the value of a text field:

"APM_MASTER__VENDOR"."Type" = 'Subcontractor'

This tests for the Vendor's Outstanding Amount being greater than 10000. Do not use quotes to specify a number:

"APM_MASTER__VENDOR"."Outstndg_Amount" > 10000

This tests whether a date field is blank:

"APM_MASTER__INVOICE"."Invoice_Date" IS NULL

This tests whether the discount date is within seven days of today:

"APM_MASTER__INVOICE"."Discount_Date" <= CURDATE()+7

This tests whether JTD Cost minus the Total Estimate is greater than or equal to 500. (Although 500 is a dollar amount, the dollar symbol ($) is not used):

"JCM_MASTER__JOB"."JTD_Cost" - "JCM_MASTER__JOB"."Total_Estimate" >= 500

This tests for any accounts where the first two characters on the left are 10. Since this is an alpha field, quotes are used around the specified value. Use the Browse Data feature to determine the field type:

LEFT("GLM_MASTER__ACCOUNT"."Account", 2) = '10'

This tests for an invoice date that is greater than or equal to January 15, 2005. Use single quotes to specify the value of a date field:

"APM_MASTER__INVOICE"."Invoice_Date" >= '2005-01-15'

Creating New Conditions

Conditions can be created while you are creating a new Task, or separately.
To create a Condition:

1. Select **File > Define Conditions**.
2. In the **Condition Name** field, enter the new Condition name. Each Condition must have a unique name.
3. From the **Application** dropdown list, select the application that contains the data record that MyAssistant should look through when applying this condition. Your selection here determines what **"Check All"** options are available.
4. From the **Check All** dropdown list, select the record that MyAssistant should look through when running the condition. For example, if you would like to check each vendor for a specific situation, select **AP Vendor**.
5. From the **Category** dropdown list, select the Category to which you want this condition added. If you wish to create a new Category, click **Add**. Conditions that are not assigned a Category are listed in a group titled *Uncategorized Conditions*.
6. In the **Description** field, enter a description of the Condition. This description is displayed when you select a Condition while setting up a task.
7. Enter your Condition statement(s) in the **Condition Expression** area.

A Condition is a test that results in a true or false statement. A Condition can contain one or more expressions, connected with "AND"s and "OR"s. You can use the tree on the left to select database fields from the Check All record or associated records. Once a field is added to the Condition Expression, it will appear in a "*TABLE NAME*"."*Field Name*" format. Both the table name and field name are surrounded by quotes and are case sensitive. For example, the Accounts Payable vendor name would appear as:
"APM_MASTER__VENDOR"."Vendor_Name"

Often conditions check to see if something is zero or blank. Specifying that something is blank varies by data type:

- **Number**: Enter the number zero.
- **Text**: Enter two single quotes: ''.
- **Date**: Use the IS NULL function.

You can also enter a mathematical expression such as adding two fields together. For example, the following would subtract the AP tax amount from the invoice amount:
"APM_MASTER__INVOICE"."Amount" - "APM_MASTER__INVOICE"."Tax"

Testing Conditions

You can use the Test button in the Define Condition dialog to make sure you are returning the data that you expect. Once the test has run, the results will be displayed in a new window. You can change the view of the results by adding data columns or sorting the results by a different column.
To add Columns to the results table:

1. **Expand** a data table in the Available Columns list
2. **Select** the Sage 300 CRE data field that you wish to view in the test
3. Click on the **right arrow** to add the field to the list of Columns in the results.
4. Click **Update Result**

To Sort the Results by a given column, click the column header in the results pane at the bottom. The results will be sorted in ascending order. Click the column header again to sort by that column in descending order.

If the results that you receive in the Test Condition dialog are not what you expect, verify that the Condition Expression is written properly. For more information, please refer to Understanding Conditions.

Please note: The changes made in the test window are not applied to any task. The columns selected in the Test Condition dialog are used solely for that test.

Related Topics

Functions
Understanding Conditions

Selecting Conditions

When you click Open in the Define Condition dialog, you have a choice between User Conditions and Built-In Conditions. Once you have selected the condition you wish to work with, click **OK** to view the condition in its entirety.

User Conditions

Any conditions that you create will be saved on the User Condition tab. You will also notice that there are several example conditions on the User Condition tab. These examples show how to use various functions in the Condition Expression.

Built-In Conditions

MyAssistant comes with 340 prebuilt conditions. They are designed to be used right out of the box and can be customized during Task setup. If the prebuilt condition is close to what you need, but you wish to modify it slightly, this can be done by opening the condition, then copying it so that you can make changes. The copied condition will be saved on the User Conditions tab.

Related Topics

Creating new Conditions
Functions
Understanding Conditions

Copying Conditions

MyAssistant comes with various prebuilt Conditions. Some of these will fit your needs right out of the box; others will need to be modified. Prebuilt Conditions do not allow you to make changes, instead they must be copied, and then the copy may be modified. This way the original Condition is always available to reference or use. In addition, you can copy the conditions that you write.

To copy a Condition:

1. Click **File > Define Conditions**
2. Click **Open**
3. **Select** the Condition you would like to edit, then click **OK**
4. Click **Copy** in the toolbar
5. Enter a unique name for the Condition, the click **OK**
6. Modify the Condition
7. Click **Save**

Editing Conditions

You may edit any custom Condition. In addition, you may copy a prebuilt Condition and make changes to the copy.

To edit a Condition:

1. Click **File > Define Conditions**
2. Click **Open**
3. **Select** the Condition you would like to edit, then click **OK**

Please note: Editing a Condition will change the Condition for all Tasks that use that Condition. If you don't want all the Tasks using that Condition to be affected, copy the Condition and use the copy to make the changes.

Related Topics

Customizing Prebuilt Conditions

Functions

Deleting Conditions

To Delete a Condition:

4. Make sure no Tasks are using the Condition you would like to delete
5. Click File > Define Conditions
6. Click Open
7. Select the Condition you would like to delete, then click OK
8. Click Delete in the toolbar. A confirmation message will be displayed.

Please note: Prebuilt Conditions may not be deleted.

Functions

Functions are built-in procedures or subroutines used to evaluate, make calculations on, or transform data. You can use one or more functions when you define a condition.

IN - Test a field for multiple values

CURDATE() - Current Date

DAYOFMONTH() - Day of the month

DAYOFWEEK() - Day of the week

MONTH() - Month of the year

YEAR() - Year

LENGTH() - Length of text

CONCAT() - Concatenate

LTRIM() - Remove space characters from the left side of a text field

RTRIM() - Remove space characters from the right side of a text field

SUBSTRING() - Return a portion of a text field

LOCATE() - Find a substring in a text field

LEFT() - Display a given number of characters from the left of a text field

RIGHT() - Display a given number of characters from the right of a text field

CONVERT() - Convert a given field to another data type

IS NULL/IS NOT NULL - Determine if a field is (or is not) blank

NOT() - Switch boolean value of a field

UCASE() - Convert text to UPPER CASE

LCASE() - Convert text to lower case

IN - Test a field for multiple values

The IN operator tests a given field against a list of values, and returns true if the field matches an item in the list. You can wrap an expression in the NOT() function to determine if a field is not one of the set of values.

Syntax: IN (comma separated list)

Examples:

To show all GL Accounts of type Current assets and Noncurrent assets:

"GLM_MASTER__ACCOUNT"."Account_Type" IN ('Current assets','Noncurrent assets')

To show all GL Accounts that are not Suspense or Units accounts:

NOT("GLM_MASTER__ACCOUNT"."Account_Type" IN ('Suspense','Units'))

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CURDATE() - Current Date

The CURDATE() function returns the current system date. This value can then be compared to other database date fields or can be part of an expression. Adding or subtracting a number from CURDATE() changes the result by the specified number of days.

Syntax: CURDATE()
The function is used with no parameters.

Examples:

To show all posted GL transactions for today:

"GLT_CURRENT__TRANSACTION"."Accounting_Date" = CURDATE()

To show all JC Jobs that started in the last 7 days:

"JCM_MASTER__JOB"."Actual_Start_Date" >= CURDATE() – 7

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DAYOFMONTH() - Day of the month

The DAYOFMONTH() function returns the day of the month (1 through 31) from the given date parameter.

Syntax: DAYOFMONTH(<date>)
The function takes one parameter, a date field. This can be a database field or the CURDATE() function.

Examples:

To show posted JC transactions that occurred on the first day of any month:

DAYOFMONTH("JCT_CURRENT__TRANSACTION"."Accounting_Date") = 1

This function could be combined with the MONTH() function to see if today is an employee's employment anniversary date:

MONTH("PRM_MASTER__EMPLOYEE"."Hire_Date") = MONTH(CURDATE()) AND
DAYOFMONTH("PRM_MASTER__EMPLOYEE"."Hire_Date") = DAYOFMONTH(CURDATE())

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DAYOFWEEK() - Day of the week

The DAYOFWEEK() function returns the day of the week (1 through 7, Sunday is the first day of the week) from the given date parameter.

Syntax: DAYOFWEEK(<date>)
The function takes one parameter, a date field. This can be a database field or the CURDATE() function.

Example:

To show AP Invoices that have an Invoice date that falls on a Monday:

DAYOFWEEK("APM_MASTER__INVOICE"."Invoice_Date") = 2

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MONTH() - Month of the year

The Month() function returns the month of the year (1 through 12) from the given date parameter.

Syntax: MONTH(<date>)
The function takes one parameter, a date field. This can be a database field or the CURDATE() function.

Examples:

To show any AP checks that were written in the month of June:

Month("APM_MASTER__CHECK"."Check_Date") = 6

This function could be combined with the DAYOFMONTH() function to see if today is an employee's employment anniversary date:

MONTH("PRM_MASTER__EMPLOYEE"."Hire_Date") = MONTH(CURDATE()) AND DAYOFMONTH("PRM_MASTER__EMPLOYEE"."Hire_Date") = DAYOFMONTH(CURDATE())

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YEAR() - Year

The YEAR() function returns the year from the given date parameter.

Syntax: YEAR(<date>)
The function takes one parameter, a date field. This can be a database field or the CURDATE() function.

Examples:

To find CM Transactions entered in the current year:

YEAR("CMT_REGISTER__TRANSACTION"."Accounting_Date") = YEAR(CURDATE())

To find CM Transactions from last year that should be moved to the history file:

YEAR("CMT_REGISTER__TRANSACTION"."Accounting_Date") = YEAR(CURDATE()) – 1

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LENGTH() - Length of text

The LENGTH() function returns the number of characters in a string of text.

Syntax: LENGTH(<text>)
The function takes one parameter, a text field, and returns the number of characters in it (including spaces).

Example:

To show any JC Jobs with a description longer than 20 characters (which may not appear well on some reports):

LENGTH("JCM_MASTER__JOB"."Description") > 20

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CONCAT() - Concatenate

The CONCAT() function puts two text fields together.

Syntax: CONCAT(<text1>,<text2>)
The function takes two parameters, both are text fields, and returns them joined together.

Example:

For a JC Job record where Job='03-001' and Description='NW Food Warehouse', then using the function like this:

CONCAT("JCM_MASTER__JOB"."Job", "JCM_MASTER__JOB"."Description")

would return the value: 03-001NW Food Warehouse.

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LTRIM() - Trim space characters from the left side of a text field

The LTRIM() function removes preceding spaces from the beginning of a text field.

Syntax: LTRIM(<text>)
The function takes one parameter, a text field, and returns the text field with spaces at the beginning removed.

Example:

This formula could be used to return records where a name was accidentally entered with a space in front of it (which would prevent that field from sorting correctly):

LTRIM("APM_MASTER__VENDOR"."Name") <> "APM_MASTER__VENDOR"."Name"

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RTRIM() - Trim space characters from the right side of a text field

The RTRIM() function removes succeeding spaces from the end of a text field.

Syntax: RTRIM(<text>)
The function takes one parameter, a text field, and returns the text field with spaces at the end removed.

Example:

This formula could be used to return records where a name was accidentally entered with a space at the end of it:

```
RTRIM("APM_MASTER__VENDOR"."Name") <> "APM_MASTER__VENDOR"."Name"
```

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SUBSTRING() - Return a portion of a text field

The SUBSTRING() function returns a specified amount of text from a specified position of the given text field.

Syntax: SUBSTRING(<text>, starting position [, length])
The function can take 2 or 3 parameters.

The first parameter is the text field to be searched

The second parameter is the starting position of the substring (The first character of the text field is position 1)

The third parameter is optional. It is the number of characters to get from the starting position. If this parameter is left out, the function will return text starting from the starting position all the way to the end of the text field.
Examples:

If you know the prefix length of an account in GL is 9 characters (including dashes), and there was no suffix, you can use this function to get just the base account. If you wanted to show all posted transactions to base account 5120 (and the account format was xxx- xxxx-xxxx):

```
SUBSTRING("GLT_CURRENT__TRANSACTION"."Account",10) = '5120'
```

In the same situation as above, but the account format contained a suffix that you wanted to ignore (xxx-xxxx-xxxx.xx):

```
SUBSTRING("GLT_CURRENT__TRANSACTION"."Account",10,4) = '5120'
```

LOCATE() - Find a substring in a text field

The LOCATE() function performs a case-sensitive search of a text field for a given string of text, and returns the position of the text being searched. If the text you are looking for is not found, then this function returns 0.

Syntax: LOCATE(<text to find>, <field to search> [, starting position])
The function can take 2 or 3 parameters.

The first parameter is the text you want to find.

The second parameter is the text field you want to search.

The third parameter is optional. It is the position where you want to start looking (the first character is at position 1). If this field is left out, then it will start looking at the beginning of the text field.

Examples:

If you want to show all AP Vendors that have "LLC" anywhere in their name:

LOCATE('LLC', "APM_MASTER__VENDOR"."Name")

If you want to show all PM Properties that have the word "Garage" anywhere in the property name, except for properties that begin with the word "Garage":

LOCATE('Garage', "PMP_PROPERTY__PROPERTY"."Name", 2)

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LEFT() - Display a given number of characters from the left of a text field

The LEFT() function returns a specified number of characters from the left side of a text field.

Syntax: LEFT(<text>, length)
The function takes 2 parameters. The first parameter is the text field to use. The second parameter is the number of characters to return from the left side of the string.

Example:

If the JC Cost Code field is formatted xxx- xxxx, where the first 4 characters are the Group Cost Code, and you wanted to use that to show all cost codes in the 400 group:

LEFT("JCM_MASTER__COST_CODE"."Cost_Code",3) = '400'

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RIGHT() - Display a given number of characters from the right of a text field

The RIGHT() function returns a specified number of characters from the left side of a text field.

Syntax: RIGHT(<text>, length)
The function takes 2 parameters. The first parameter is the text field to use. The second parameter is the number of characters to return from the RIGHT side of the string.

Example:

If the JC Job field is formatted xxxx-xxxx, where the last 4 characters represent the year the job started, and you wanted to use that to show all jobs that started in 2005:

RIGHT("JCM_MASTER__JOB"."Job", 4) = '2005'

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CONVERT() - Convert a given field to another data type

The CONVERT() function changes the type of a field to a specified type.

Syntax: CONVERT(<field>, <type>)
The function takes two parameters. The first parameter is the field to be converted. The second parameter is the data type to convert to. The following is a list of those types:

SQL_BIT (1 = TRUE, 0 = FALSE)

SQL_DATE (year, month, day)

SQL_DECIMAL

SQL_DOUBLE

SQL_REAL

SQL_INTEGER (use this if you want to drop the decimal part of a number, not to round).

SQL_VARCHAR (use this to convert to text)

Examples:

If the JC Job field was formatted as xx-xxxx, where the last four characters represented the year in which the job started, using the RIGHT() function to get the year would return the year as text. If you wanted to compare that value to the current year using YEAR(CURDATE()), the year would be returned as an integer. You can convert the number to text and then compare:

RIGHT("JCM_MASTER__JOB"."Job", 4) = CONVERT(YEAR(CURDATE()),SQL_VARCHAR)

To create a date from text:

CONVERT('2006-01-31', SQL_DATE)

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IS NULL/IS NOT NULL - Determine if a field is (or is not) blank

These expressions is used to determine if a field is or is not null (empty). Dates can be empty, as can many text or numeric fields before they are given a value. A field is Null is different from it containing a 0 or blank.

Syntax: <field> IS NULL –or– <field> IS NOT NULL
Use this expression to determine if the field is empty.

Examples:

To show all PR Employees who have not been terminated:

"PRM_MASTER__EMPLOYEE"."Terminate_Date" IS NULL

To show all AP Invoices that have a Discount Date entered:

"APM_MASTER__INVOICE"."Discount_Date" IS NOT NULL

To see CM Transactions where the payee field is blank:

"CMT_REGISTER__TRANSACTION"." Payee" IS NULL OR
"CMT_REGISTER__TRANSACTION"."Payee" = ''

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NOT() - Switch boolean value of a field

The NOT() function will reverse the value of the expression within the parentheses. If the expression results to TRUE, then the resulting value after the NOT operation will be FALSE. If the expression results to FALSE, then the resulting value after the NOT operation will be TRUE.

Syntax: NOT(<logical expression>)
Reverses the value of the expression.

Examples:

To show all AP vendors who are not 1099 recipients:

NOT("APM_MASTER__VENDOR"."Receives_Form_1099" = 1)

To show all GL Accounts that are not Suspense or Units accounts:

NOT("GLM_MASTER__ACCOUNT"."Account_Type" IN ('Suspense','Units'))

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UCASE() - Convert text to UPPER CASE

The UCASE() function makes the specified text field all upper case.

Syntax: UCASE(<text field>)
Converts the specified text field to upper case.

Examples:

To show all AP Vendor IDs that are not in all upper case letters:

UCASE("APM_MASTER__VENDOR"." Vendor") <> " APM_MASTER__VENDOR"."Vendor"

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LCASE() - Convert text to lower case

The LCASE() function makes the specified text field all lower case.

Syntax: LCASE(<text field>)
Converts the specified text field to lower case.
Examples:

To show all Invoices with the word "window" in the description:

LOCATE('window', LCASE("APM_MASTER__INVOICE"."Description")

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Data Folders

When configuring the MyAssistant Server, you can choose to have MyAssistant monitor and report on multiple Sage data folders. If MyAssistant is set up this way, you'll choose in Task Setup which data folder(s) you want to run a Task for. to choose which data folders it will run for.

Tasks can be run on more than one data folder, and you can change which data folder(s) a Task runs on after it has been initially set up.

If MyAssistant is only monitoring one Sage data folder, this step will be skipped in Task Setup.

Tip: Use the preview in the Condition step to confirm that each Sage data folder you want to run a Task for has the information you want to monitor

Task Schedule

Many customers like the ability to send or receive information automatically. With MyAssistant, Tasks can be set up to run and send emails automatically on a Schedule. Every Task has its own Schedule, which controls the days & times a Task runs. Since Tasks run & emails send from the server, many companies schedule Tasks to run outside business hours and on weekends.

Examples include:

- On the first day of every month at 5am
- Every other Wednesday at 3pm
- The last Friday of every month
- Every weekday at 8am

Tip: Tasks that are set to run on a schedule can still be run manually. For example: A Task scheduled to send an email every Friday is manually run on Tuesday. The Task will run and send an email (if it finds information to send) on Tuesday, then still runs automatically on Friday.

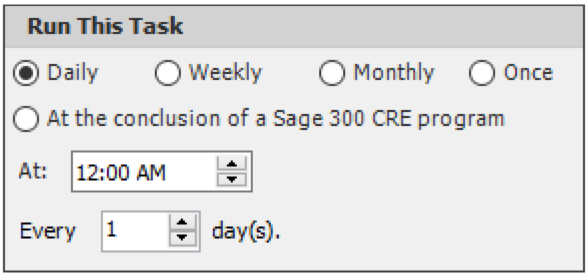
How to add a Schedule to a Task

1. Get to the Schedule step of Task Setup.
   Note: Schedules can be added while setting up a Task or after it is activated
2. Click the circle next to "On a schedule"
3. Choose when you'd like the Task to run (Daily, Weekly, Monthly, etc.)
4. Choose time & day customizations (which will change depending on what you pick)
5. To add another schedule, click "Add another schedule" and repeat steps 3 & 4
6. Click "Next" to go the Email step of Task Setup or "OK" to close the window (depending on when you're adding the Schedule to the Task).

Daily Schedule Customizations

A "Daily" schedule lets you choose:

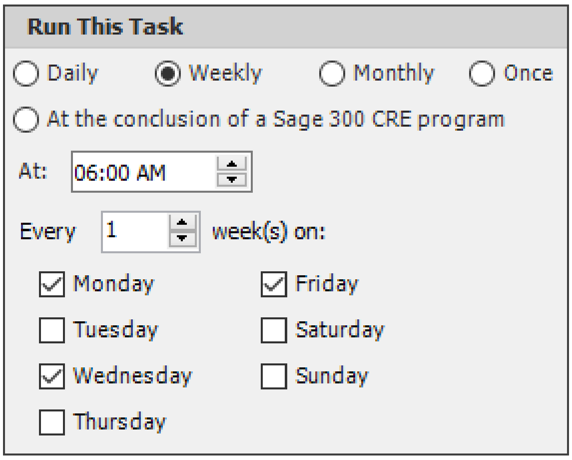
- What time the Task runs
- What days the Task will run (e.g. every day, every other day, every 3 days, etc.)



Weekly Schedule Customizations

A "Weekly" schedule lets you choose:

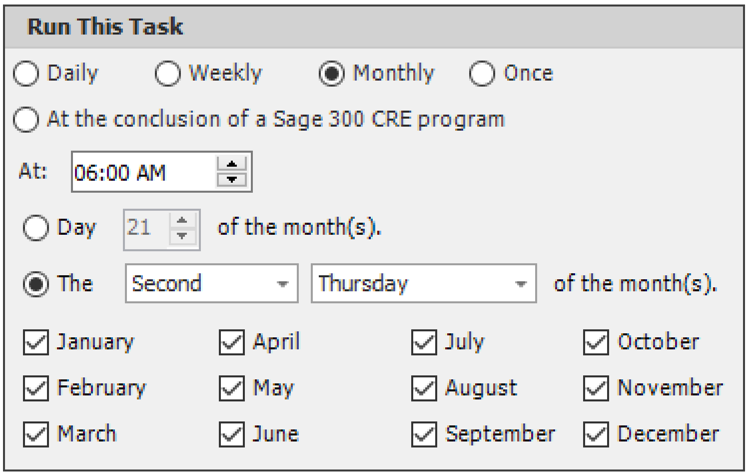
- What time the Task runs
- What days of the week a Task will run
- What weeks the Task will run (e.g. every week, every other week, etc.)



Monthly Schedule Customizations

A "Monthly" schedule lets you choose:

- What time the Task runs
- What day of the month the Task runs:
    - A specific date (e.g. the 15th), or
    - A specific day (e.g. the last Monday of the month)
- Which months the Task will run



Email

The Email step of Task Setup is where you specify who MyAssistant should email when information is found. It is also where you control what's in the emails that are sent, including any attachments.

Recipients

The Task can send emails to the recipients specified in the To, Cc and Bcc lines; or MyAssistant can look up who to notify based on the information found by the Task. For more information on recipients, click here

Email content

Emails sent by MyAssistant Tasks most often contain a combination of one or more of the following:

List of alerts or other items in message body

A table in the body of an email containing one row per item being monitored by the Task Condition (e.g. JC Job). In the Email step, you'll select the columns that appear in the email(s) that are sent, as well as any messaging above or below the table

AP Vendors missing a Contact 1 Email

Vendor	Name	Contact 1 Telephone
101	Alpha Insulation	(503)821-1176
104	AAA Insurance and Bonding	(503)242-5860
200	B & M Marble, Inc.	(503)242-1500
202	Beaverton Painting	(503)626-8484
206	Beaverton; City of	(503)626-2500
302	Commercial Pest Control	(503)626-5575
401	Dallas Tile & Carpet	(503)655-5252

Attached Spreadsheet

The latest information from Sage in an easy-to-read attached Excel spreadsheet. MyAssistant attaches what's called a "spreadsheet template" to the Task to create the spreadsheet -- this is what determines the Sage information that will be included in the spreadsheet and its layout. A template is used so no matter how much or how little information is found, the appearance of the spreadsheet's content is consistent.

Vendors with Expiring Insurance

				General Liability		Auto		Worker's Compensation		Umbrella	
Vendor	Name	Phone	Contact	Proof Req	Exp Date	Proof Req	Exp Date	Proof Req	Exp Date	Proof Req	Exp Date
100	A-1 Electric Company	(503)744-3200	Carlton; Rob	x	6/30/2016	x	10/1/2015	x	10/1/2015		12/31/2014
1000	Jackson Heating & A/C	(503)854-6663	Brown; Pete	x	6/1/2015			x		x	4/30/2015
101	Alpha Insulation	(503)821-1176	Elliott; Collin	x	12/1/2014	x	4/30/2014	x	2/28/2016		
102	Acme Door & Glass Distributors	(503)245-8162	Johnson; Bill	x	4/30/2016	x	4/14/2016	x	12/31/2016		
103	Ace Drywall	(503)858-3838	Ryan; Paul	x	4/30/2016	x	4/30/2015	x	6/14/2015		
1101	Kingston Plumbing	(503)289-5623	Turner; Laura	x	1/31/2016			x	3/31/2016		
1111	Tufnel Inc	503-555-1245	Nigel Tufnel		10/1/2016	x	1/29/2016				
1200	Larson's Hardware	(503)672-9327	Dalton; Chris			x	8/31/2015				
1201	Logan Sanitation	(503)745-6985				x	9/30/2015	x	4/30/2015		
1300	Marion Cnty Commercial Digging	(503)846-9972	Stevens; Parker	x	4/30/2016			x	10/31/2015		
1400	Northwest Landscaping	(503)242-1105	Bates; Lori					x	6/30/2015		

Attached Reports

Almost any report from a Sage reports menu can be emailed as an attached PDF from MyAssistant. Report designs created with Crystal Reports can also be used to send PDFs, Excel spreadsheets or text files as attachments. Documents or attached reports can also be attached and set up so each recipient would receive only their information.

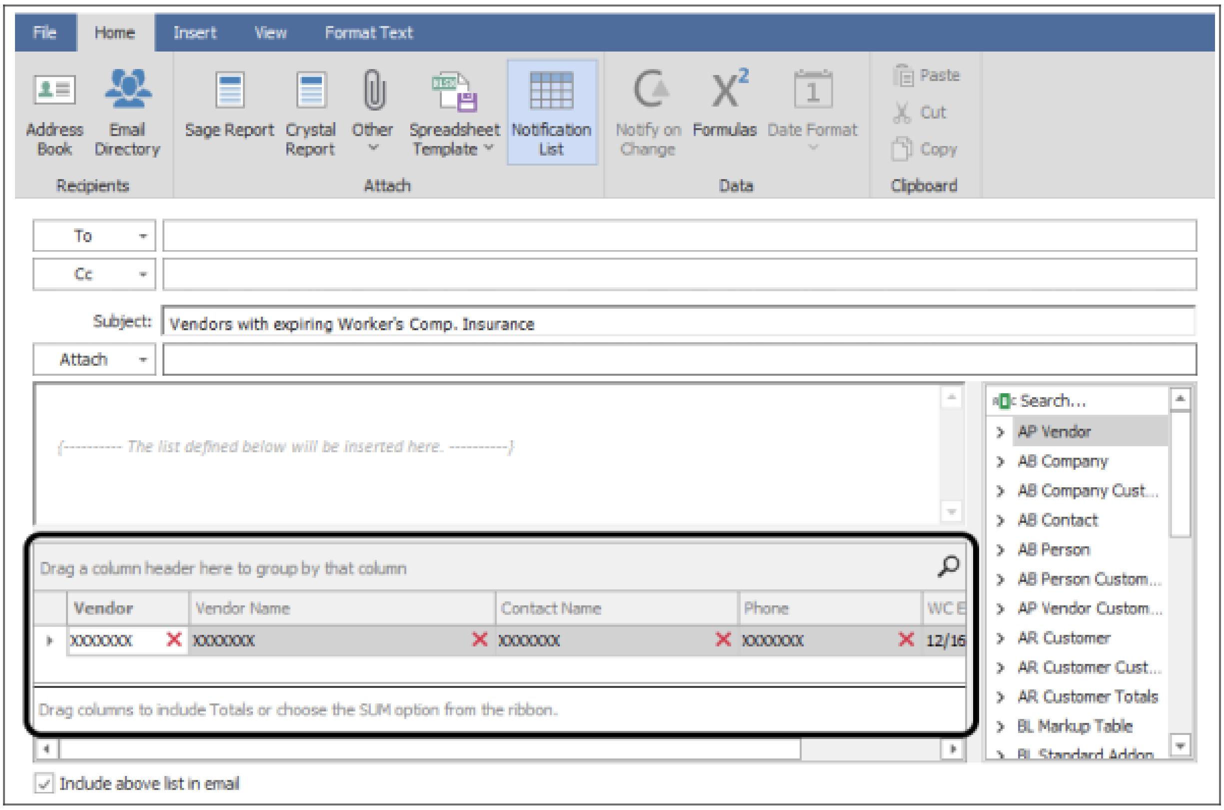
Send a List of Notifications

Sending a list of Notifications is one of the most popular uses of MyAssistant because of how easy it is to set up. Once you've chosen What to Send and selected your Condition, you'll pick what information will be included in the list. Examples include or AP Vendors with expiring insurance, Cost Codes over-budget by a specified amount, and Employees with birthdays in the next 14 days.

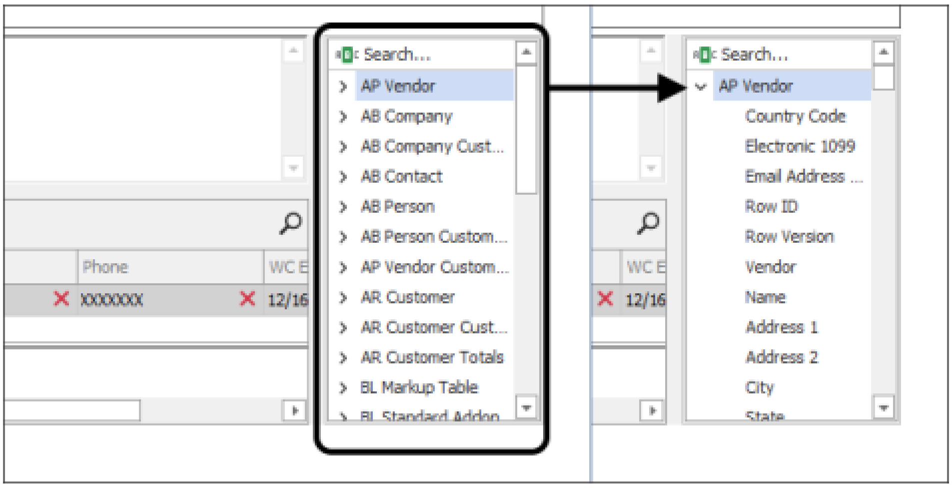
Key Parts

There are three key parts for sending a list:

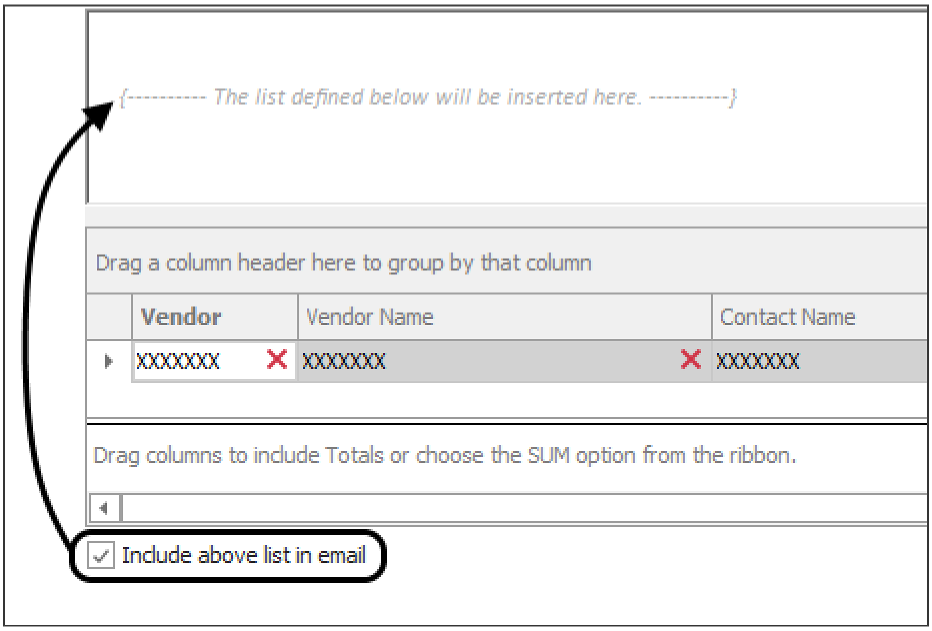
List Builder Section: The section at the bottom of the Email step where you will pick the columns that are included in your emailed list. You can also determine the columns' size and order, if the information should be grouped, and if there are any totals.



List of available Sage information: Also called the "Sage Field List", this section in the bottom-right of the Email step contains all the information that can be accessed based on what you're sending a list of in the email. What you're sending a list will always be the top group, followed by the other information you can access. Expand one of the groupings in the list and drag a field into the List Builder section to add it to your list:



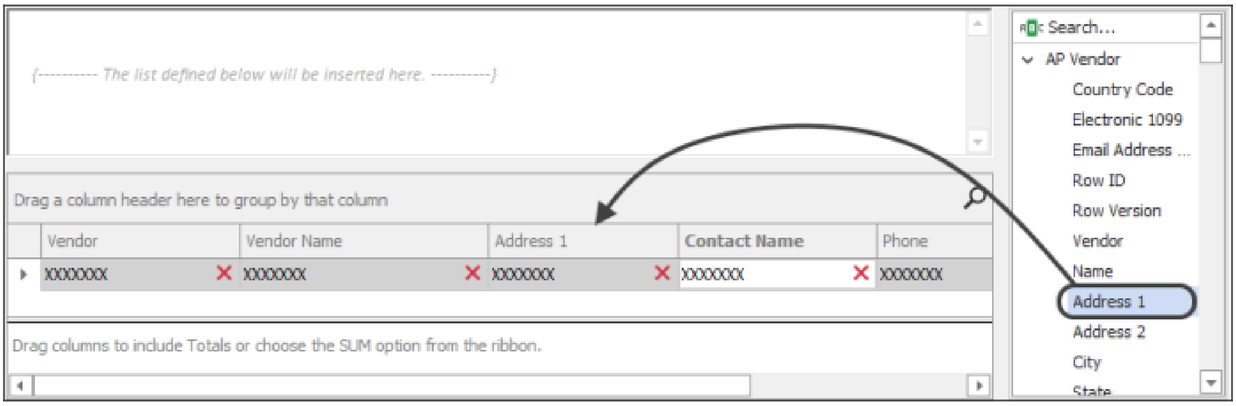
"Include above list in email" checkbox: This controls whether or not the list created in the "List Builder Section" will be included in the email(s) sent by the Task.



Checking this box (if not already checked) will cause the gray text "The list defined below will be inserted here" to appear in the message section. This gray text indicates the position of the table in any emails sent by the Task. Any text or fields added above the gray text will appear above the emailed list, while any text under the line will appear below it.

How to Add Columns

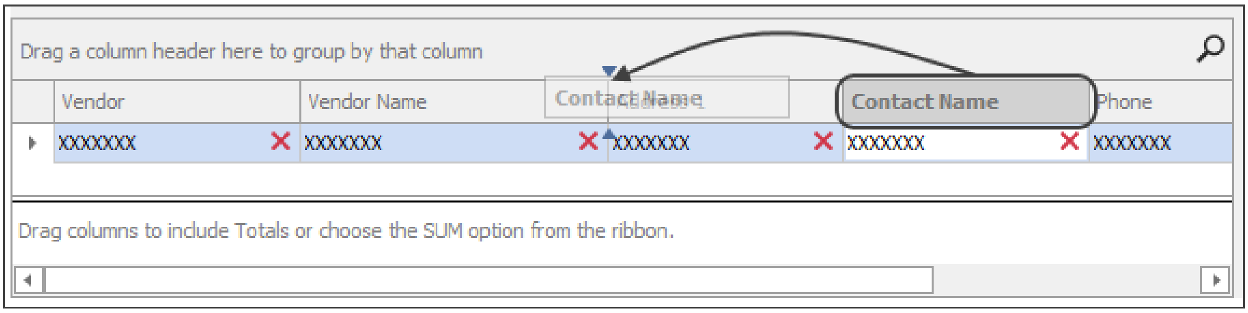
Expand any of the groups inside the "Sage Field List" in the bottom-right, then click and drag the field you want into the List Builder Section.



Tip: Use the search bar at the top of the list to more quickly find the information you want to add.

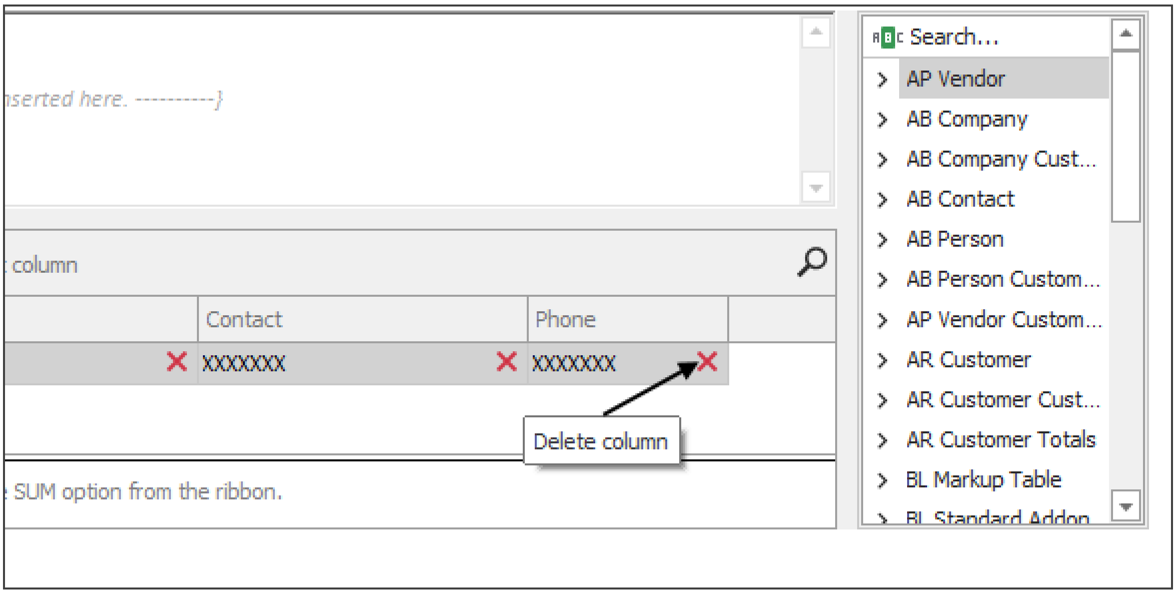
How to Rearrange Columns

To change the order the columns appear in the list you send, click & drag a column header in the List Builder section and move it to the left or right. Blue triangles will show where the column will go when you release the click.



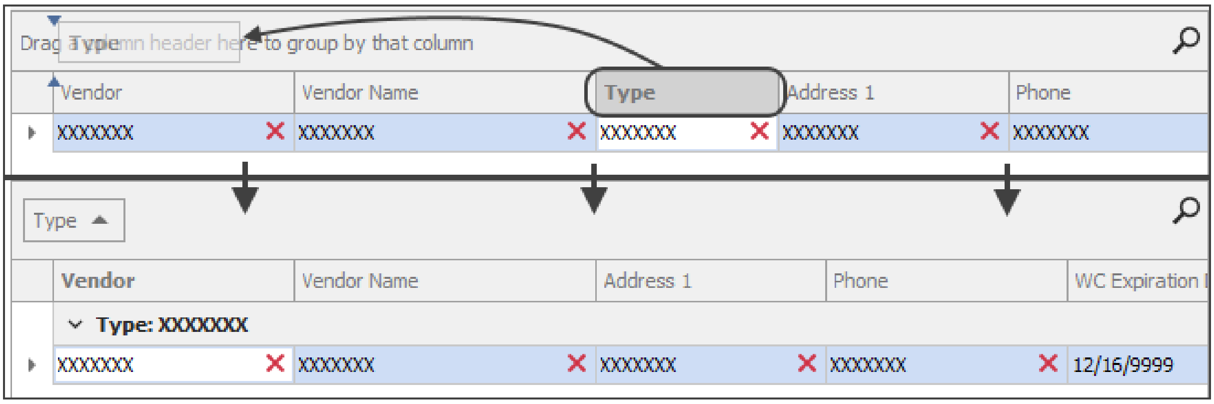
How To Remove Columns

Many prebuilt Tasks already have columns added to the List Builder section. MyAssistant may also import some fields used in the Condition when creating your own Task. To remove any unwanted columns, click the **X** under the column header.



How to Group by a Column

The list in an email can be grouped by the information in a Sage field. For example, you can group JC Cost Codes by Job, AP Invoices by Vendor, or AR Invoices by Customer. To group information in a list by a Sage field, click and drag the Sage field from the list to the section labeled "Drag a column header here to group by that column":



Related Links

What to Send - Send a List of Notifications

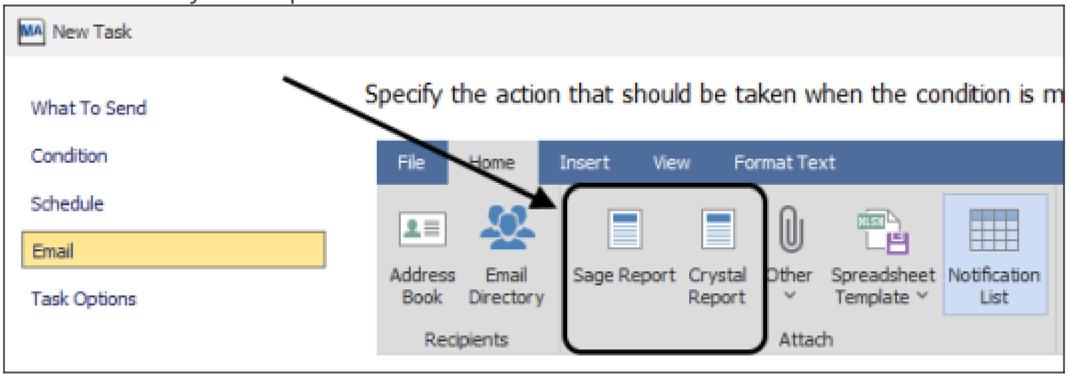
Send a List of Notifications Overview

Send Reports & Documents

MyAssistant can automatically generate and send reports and documents to recipients. This is done by first attaching a "report design" to a Task.

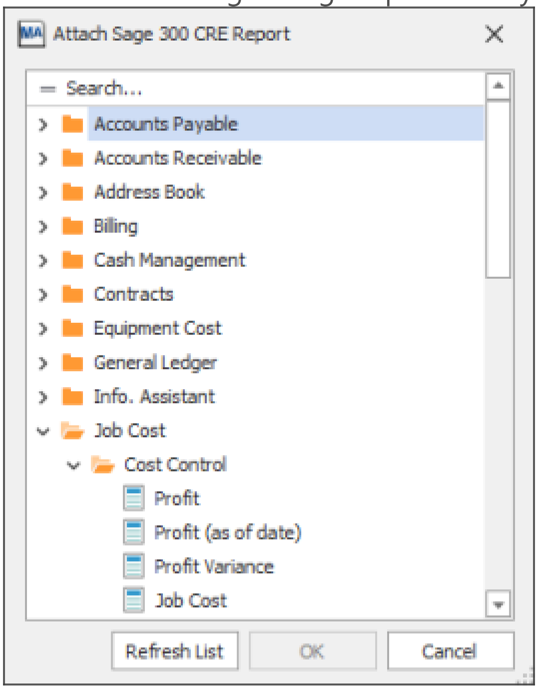
How to attach a report

There are two ways to attach a report design to a MyAssistant Task -- attach a "Sage Report", or attach a "Crystal Report"



Sage Report: Almost any report on a Reports menu in Sage 300 can be attached to a MyAssistant Task. Please note: if a report was created in Sage Report Designer, it must be attached to a Sage Reports menu before attaching it to a MyAssistant Task.

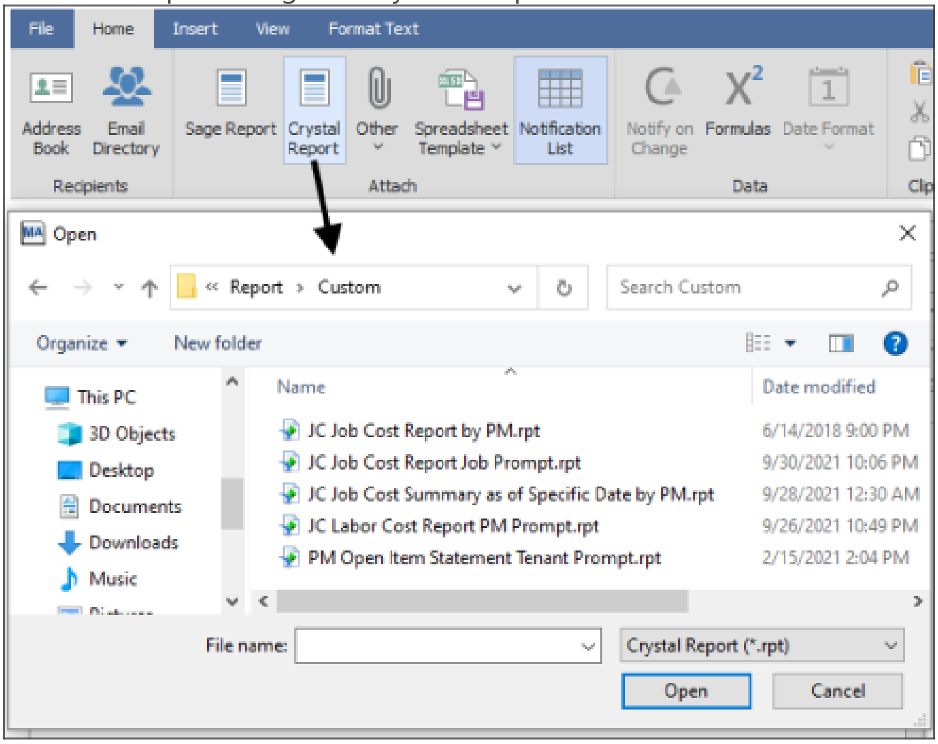
To attach a Sage report to a Task, click the "Sage Report" button in the ribbon. This will open a window showing all Sage reports that you can access, grouped by application:



Expand the folders, select the report you want to attach and click "OK"

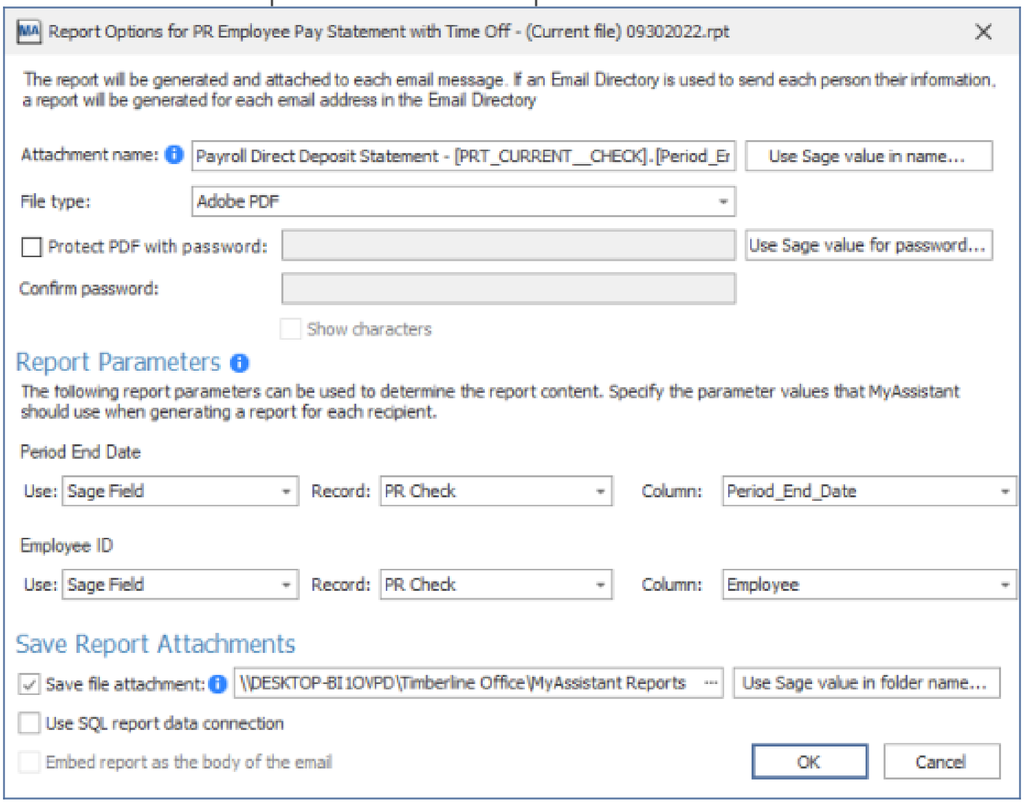
Tip: Use the search bar at the top of the list to more quickly find the report you want

Crystal Report: Report designs created with the Crystal Reports software can be attached directly to a MyAssistant Task by clicking the "Crystal Reports" button and navigating to where the report design is on your computer.



Report Options

After attaching a Sage report or a Crystal Reports design to a Task, a window will open that will feature several options around the report.



Attachment Name: This is the name of the attachment on the email(s) sent by the Task. You can also use information from Sage in the attachment name by clicking the "Use Sage value in name..." button. For example: If you were sending each Customer their monthly statement, you could add the "Name" field from the AR Customer Setup to the attachment name.

Attachment Type: Crystal Report designs can produce a PDF, an Excel spreadsheet, a plain text document, or Comma Separated Values (CSV) file attached to emails. Reports attached from Sage are always sent as PDFs

Protect PDF with Password: You can password-protect PDFs sent with MyAssistant, and you use a Sage field to have a unique password for each recipient. For example, you can password-protected each employee's pay stub with the last four digits of their SSN.

Report Prompts: Any prompts the report needs in order to fill out its contents will be displayed in a specific section. These prompts can be filled in with a set value that will be the same time you'll see a list of those parameters below. Each parameter can be loaded with a specified value, a Sage 300 CRE Data field, or a MyAssistant Formula.

Note: Reports are run on a per-email basis. This means that if the Task email is set up to use an Email Directory, then the report will run once for each Email Directory Recipient's email.

Save Report Attachment: MyAssistant can save a copy of each attached report, document or spreadsheet sent by the Task to a location on a computer. Click here for more information

Related Links

Send Reports & Documents Overview

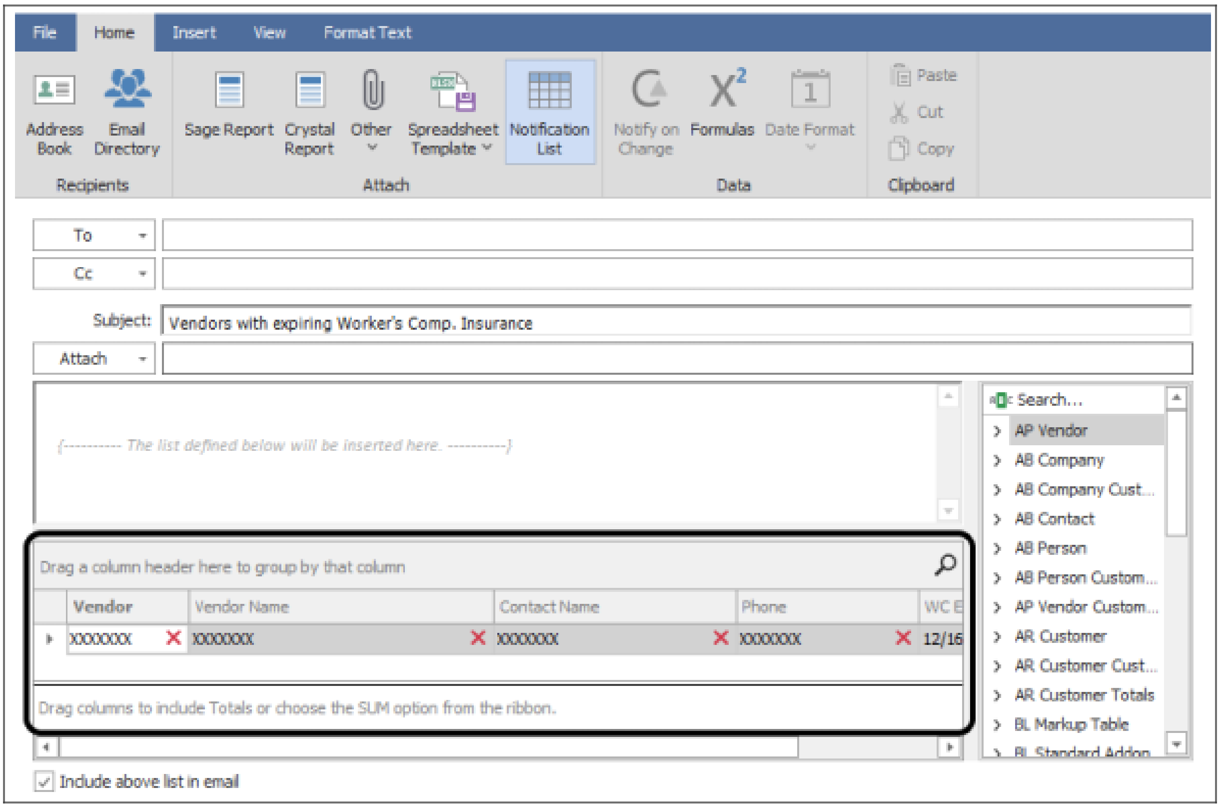
Send a Spreadsheet

Many people like to receive information in an Excel spreadsheet. Any information in Sage can be sent in a spreadsheet using MyAssistant. Examples include AR Aging Spreadsheets, Job Cost Breakdown spreadsheets, and AP cash flow spreadsheets. Spreadsheets can be added to MyAssistant Tasks using Spreadsheet Templates, which define the spreadsheet's content and layout.

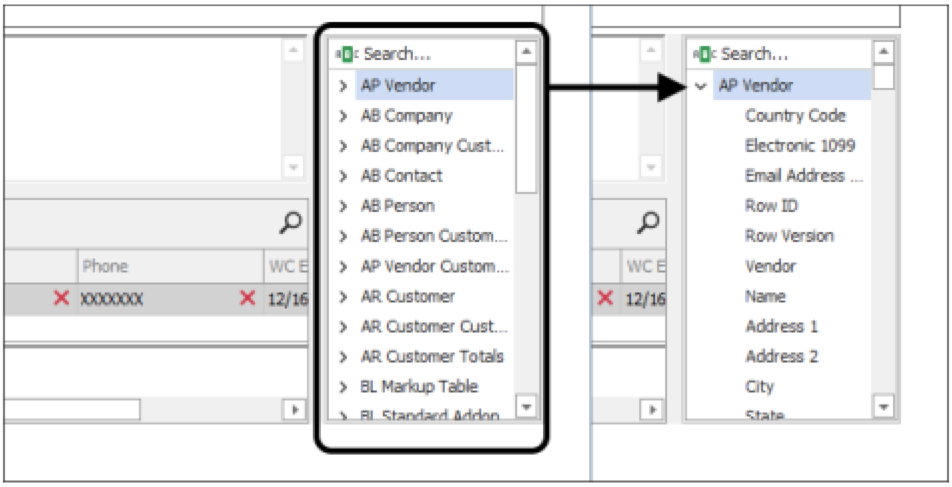
Key Parts

There are three key parts to sending a spreadsheet

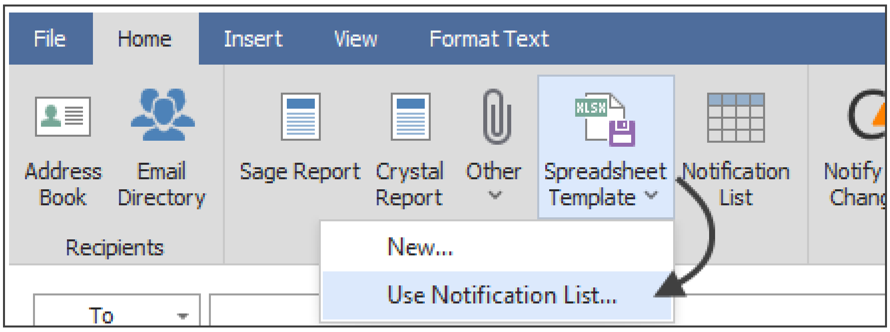
List Builder Section: Normally used when sending a list of items in the body of an email. However, this section in the bottom-middle of the Email step is where you will pick the columns to be included in your emailed spreadsheet. You can also determine the columns' order, if the information should be grouped, and if there are any totals.



List of available Sage information: Also called the "Sage Field List", this section in the bottom-right of the Email step contains all the information that can be accessed based on what you're sending in your spreadsheet. What you're sending one row per will always be the top group, followed by the other information you can access. Expand one of the groupings in the list and drag a field into the List Builder section to add it:



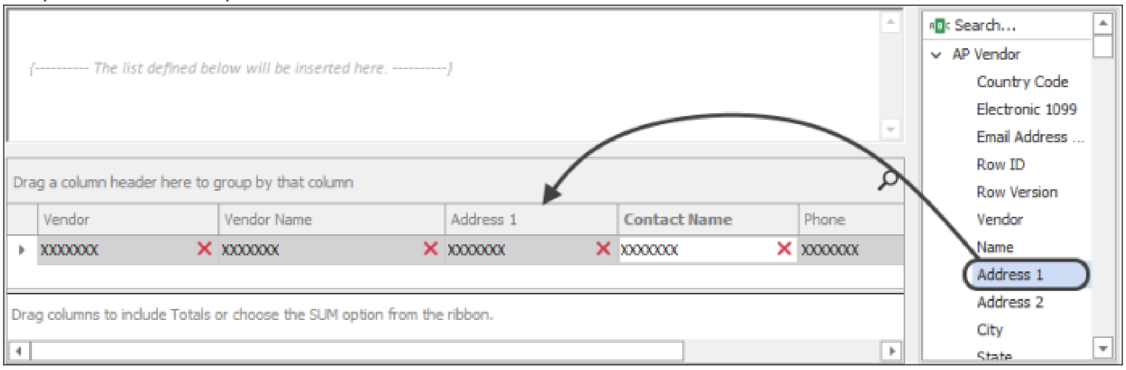
Spreadsheet Template: Sets the format for how information should appear in the spreadsheet. Spreadsheet templates are added to a Task by clicking the Spreadsheet Template button in the Email Step of Task Setup and selecting either "New" or Use Notification List



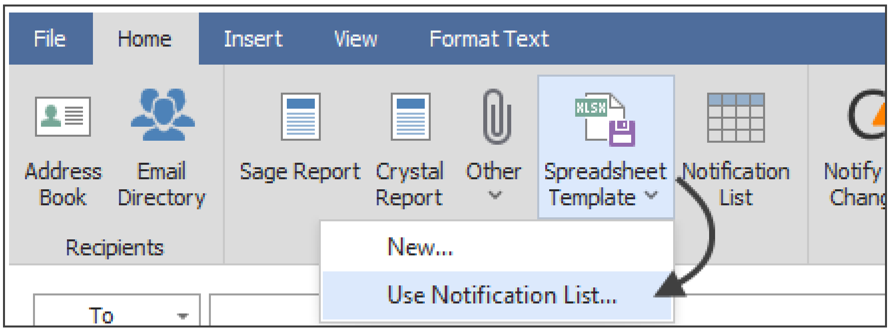
How to Attach a Spreadsheet to an Email

Any MyAssistant Task can send a spreadsheet if one isn't already attached. The most efficient way to send an attached spreadsheet is to take a Task that would normally send a list in the body of an email and turn it into a Spreadsheet Template.

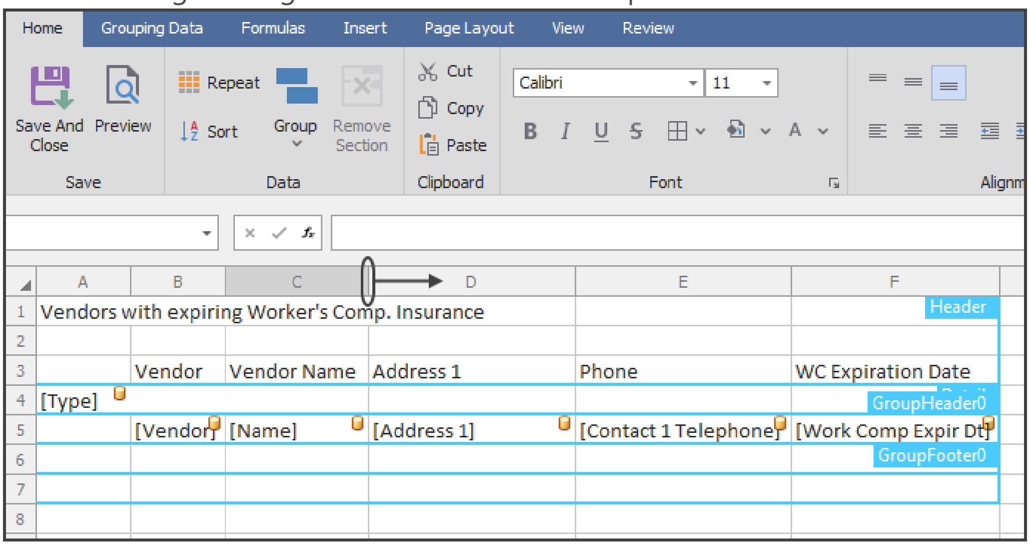
1. Select or create a Condition that will create a mailing list (i.e. only find information for the people you want to email)
2. Add the fields you want in your spreadsheet to the List Builder section in the Email step of Task Setup



3. Create a Spreadsheet Template by clicking "Spreadsheet Template" and selecting "Use Notification List"

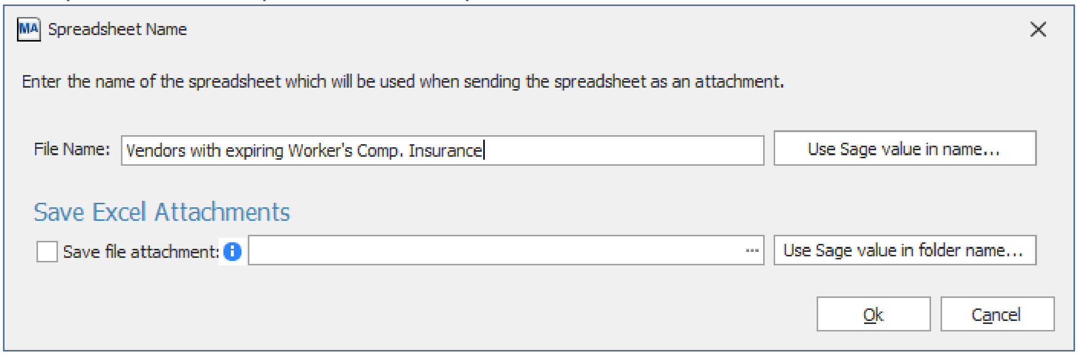


4. Click and drag the edges of the columns in the spreadsheet to resize them as desired



5. Make any other changes to the spreadsheet template (e.g. bolding and centering column headings)
   Click "Save & Close" to save the spreadsheet template

6. Accept the default spreadsheet template name or enter a new one



Tip: Any MyAssistant Task that sends a list of items in an email can be updated to send a spreadsheet using the above steps.

Related Links

Send a Spreadsheet Overview

Send Each Person Their Information

A popular use of MyAssistant is to send multiple recipients only their information with a single Task. Common examples include:

- Weekly direct deposit pay stubs to Employees
- Electronic payment notices to Vendors
- Service Management invoices to Customers
- Reports and spreadsheets to Project Managers containing only their jobs

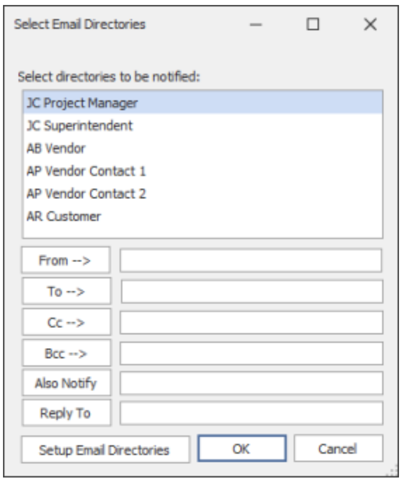
Keys to Sending Each Person their Information

Mailing List with the Task Condition: When sending each recipient only their information, the Task Condition determines who should be sent an email and who shouldn't. For example:

Task Goal	Task Condition	Mailing List That's Created
Send employees their weekly pay stubs	PR Checks from the most recent pay period	Employees who got a check in the last pay period
Send ACH payment notices to Vendors	AP Electronic Payments in the last 3 days	Vendors who were paid electronically in the last 3 days
Send Project Managers reports for their over-budget Jobs	In progress Jobs that are over-budget and have a Project Manager specified	Only the Project Managers who have over-budget Jobs

Email Directory to look up recipients: MyAssistant Email Directories look up email addresses in Sage for each item found by the Task Condition. Once MyAssistant has associated an email address with each item found by the Condition, it separates them into a separate email for each recipient.

To add an Email Directory to a MyAssistant Task, click the "Email Directory" button in the Email Step of Task Setup. Select the Email Directory you want to use, then click the button that matches where you want to add it (e.g. the "To" line, "Cc" line, etc.):

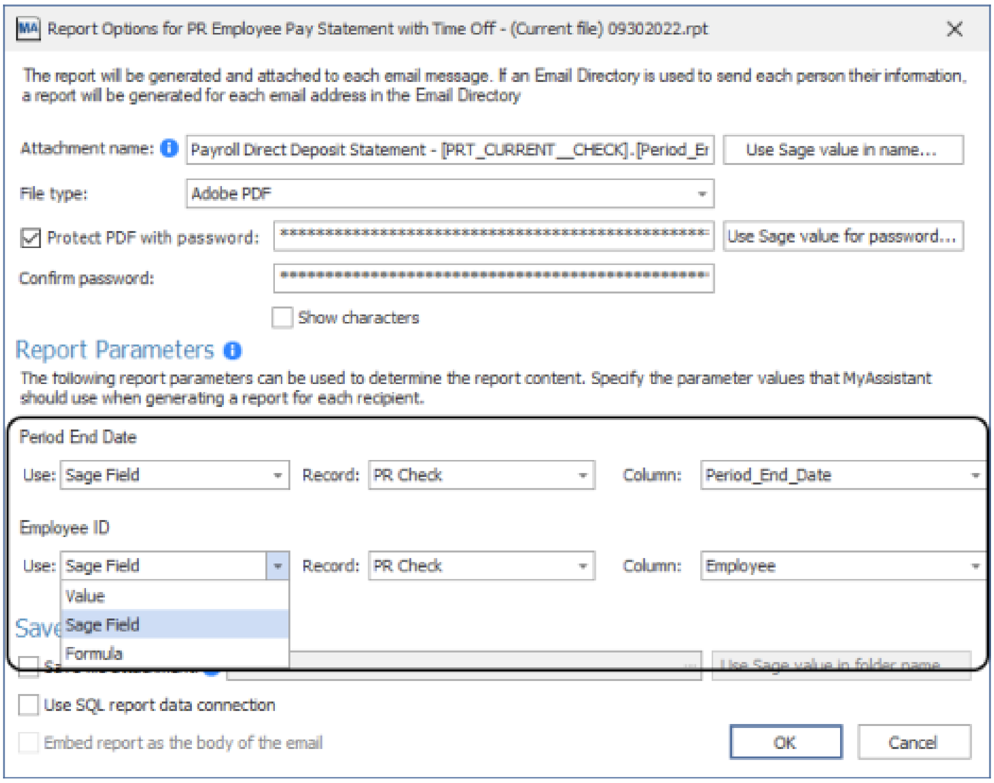


TIP: MyAssistant automatically filters what Email Directories are available on a Task, depending on where the Task is looking for email addresses and what information is being looked up by the Task. MyAssistant will only show Email Directories where a direct relationship exists.

Related: Email Directories

Prompts on Reports that filter the attachment's contents: When using MyAssistant to send attached PDFs like pay stubs, Customer statements, Job reports and more; you'll use prompts on the attached reports to filter the content for each email message. When you attach the report, change each applicable prompt so it will use the value from a Sage field -- this is how the report will create different content for different recipients:

For example: To send each employee their pay stub, attach a report design that prompts for Employee ID and Period End Date. When the Report Options window opens, change the prompts to use Sage fields:



Now the report will use the Employee ID and Period End Date from the check associated with each email to fill out the report's prompts.

IMPORTANT: Attached reports run once per email message created by the Task. If a report is using information from Sage to fill out report prompts and there is more than one value that can be used for a prompt (e.g. multiple Employee checks in one email), the attached report will use one random value to use in the report prompt.

Please note: this third key is not used when sending lists of alerts in the message body or spreadsheets

When Set Up Correctly:

1. The MyAssistant Task creates a mailing list based on the Condition's criteria
2. The Email Directory on the Task associates an email address with each item found by the Condition
3. Items are grouped and sorted into a separate email per recipient email address
4. Email content is created for each recipient, including any attached reports being run once per email. The attached report's prompts are set up to filter its content for each recipient
5. MyAssistant emails each recipient a separate message with only their information

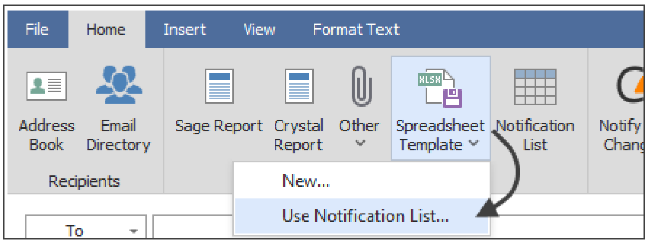
To send each recipient only their items in a list

1. Select or create a Condition that will create a mailing list (i.e. only find information for the people you want to email)
2. Create the list of alerts you want to send in the Email step of Task Setup
3. Add an Email Directory to the Task

When set up correctly: MyAssistant will send an email to each recipient with a list of only their items in the message.

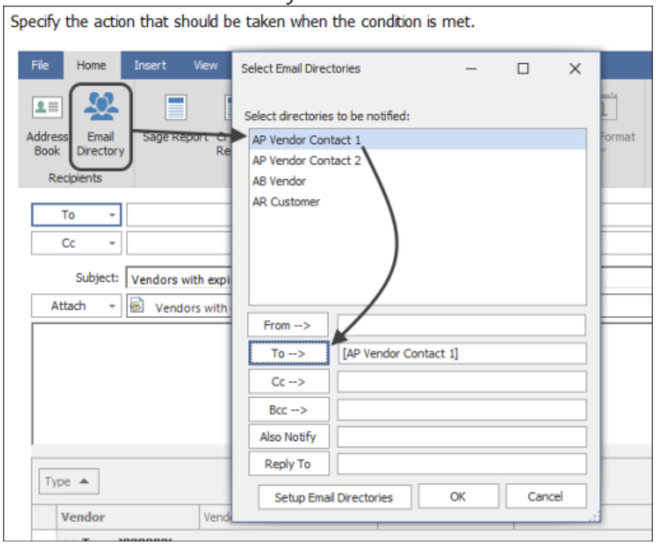
To send each recipient a spreadsheet of only their information

1. Select or create a Condition that will create a mailing list (i.e. only find information for the people you want to email)
2. Add the fields you want in your spreadsheet to the List Builder section in the Email step of Task Setup
3. Create a Spreadsheet Template by clicking "Spreadsheet Template" and selecting "Use Notification List"



4. Adjust and save the Spreadsheet Template. More information on Spreadsheets can be found here.

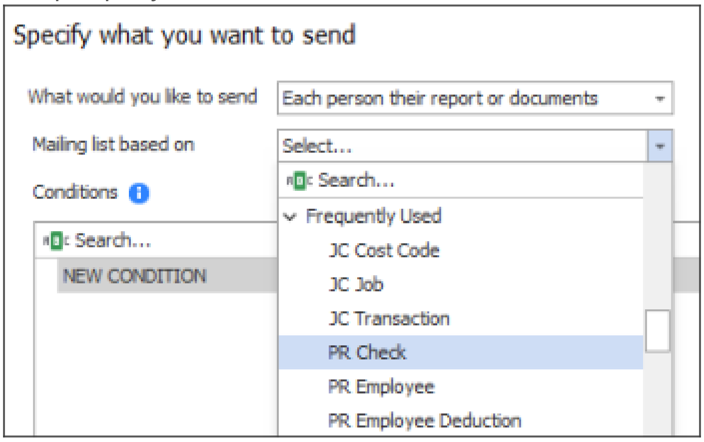
5. Add an Email Directory to the Task



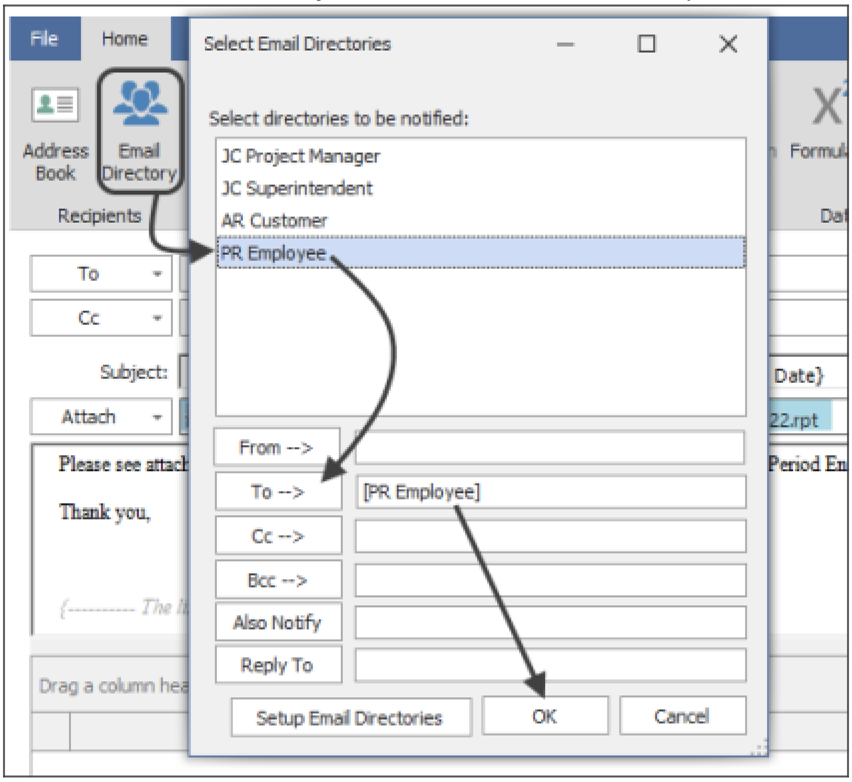
When set up correctly: The Task will send each recipient an email with an attached spreadsheet containing only their information.

To send each recipient only their documents/reports

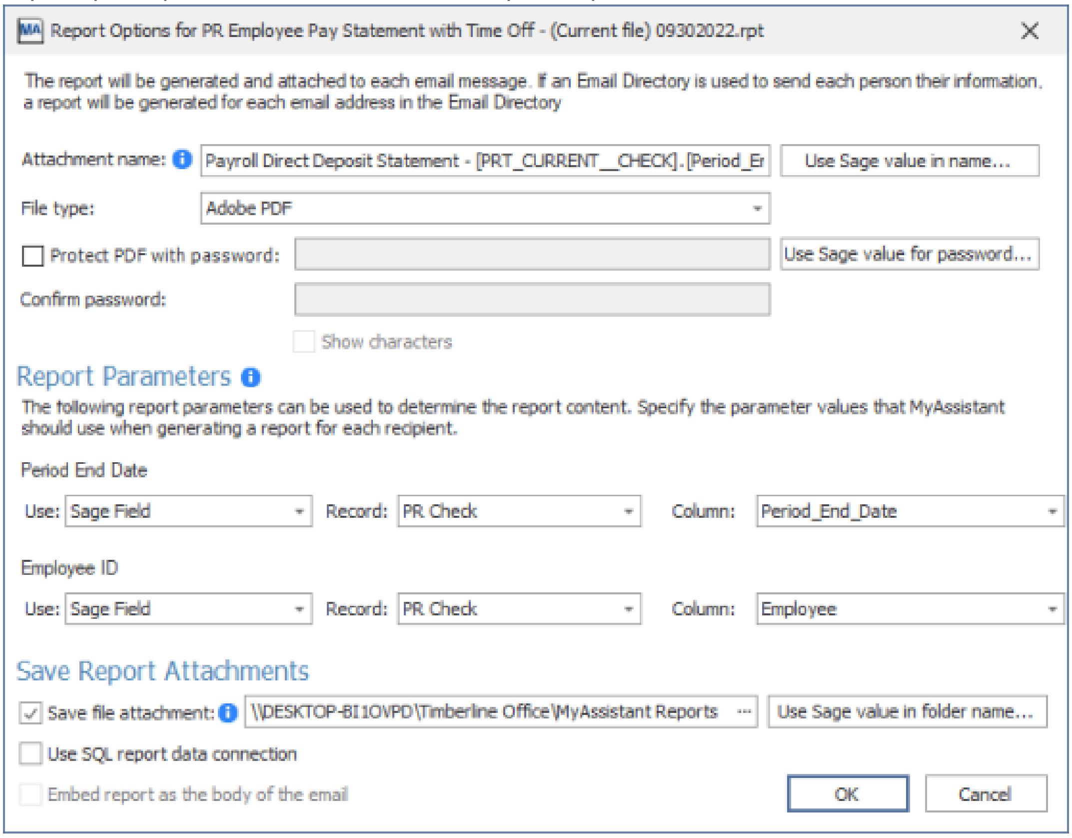
1. Select or create a Condition that will create a mailing list (i.e. only find information for the people you want to email)



2. Attach an Email Directory to the Task in the Email step of Task Setup



3. Attach a report design to the MyAssistant Task, and use Sage fields to fill out the report prompts in the middle of the Report Options window



Recipients

A key part of MyAssistant Tasks is determining who should be sent emails. MyAssistant can send emails to a set list of recipients, or it can look up who to notify based on the information found.

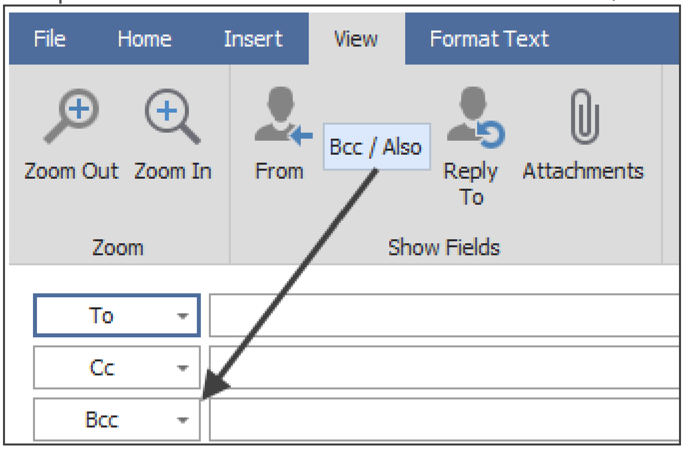
Set Recipient List

To have a MyAssistant Task send emails to the same recipients every time, enter e-mail addresses in the TO or CC fields, or click on the TO or CC buttons and select one or more names from your Outlook address book. The person's name and e-mail address will be entered in the corresponding recipient fields.

Tip: To type more than one email address on a line, add a semicolon (;) and a space between each email address

BCC

Some companies want to add someone as a recipient but don't want other recipients to worry. To add a recipient as a Bcc, click the View tab and click the "Bcc/Also" button. Recipients listed on this field will receive emails, but will not be seen by other recipients.



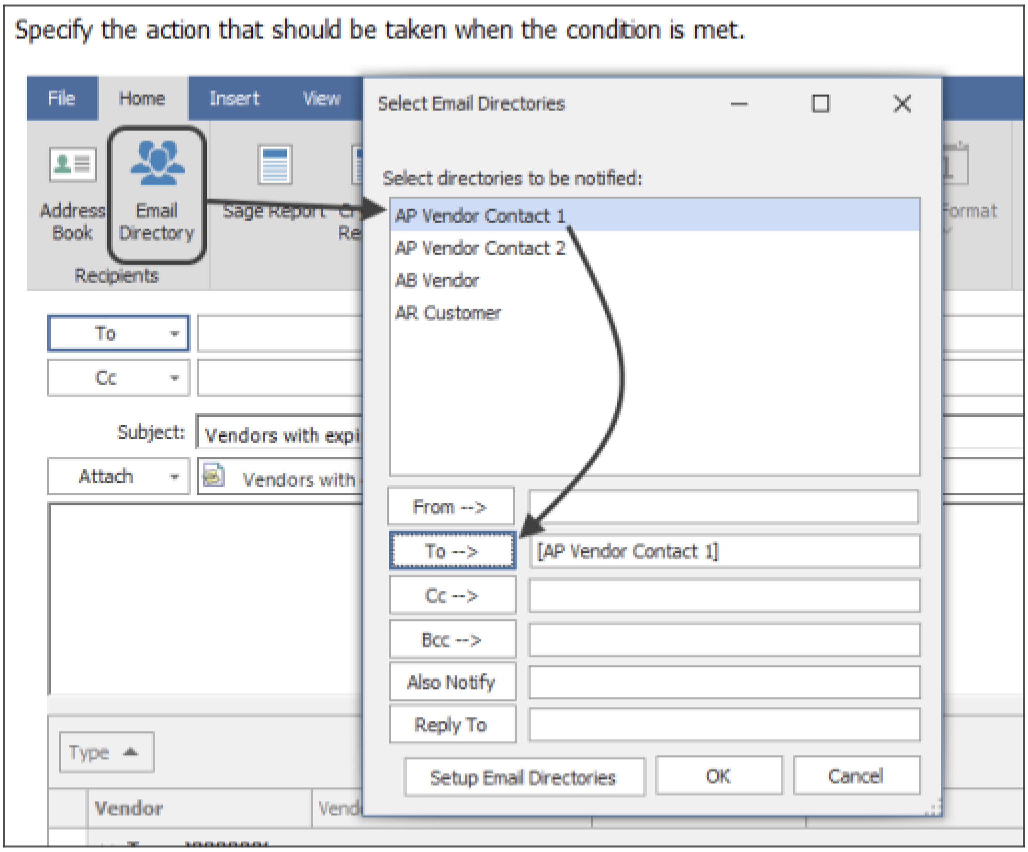
Tip: If you do not want a Task to send any emails, leave all recipient fields blank

Email Directories

An Email Directory tells MyAssistant what email address to use to send each recipient only their information.

To add an Email Directory in a Task:

1. Get to the Email step of Task Setup
2. Under the Home tab, click the Email Directories button at the top
3. Select the Directory you wish to notify and choose TO, CC, or BCC
4. Click OK



For more information on Email Directories, click here

Saving Copies of Emailed Attachments

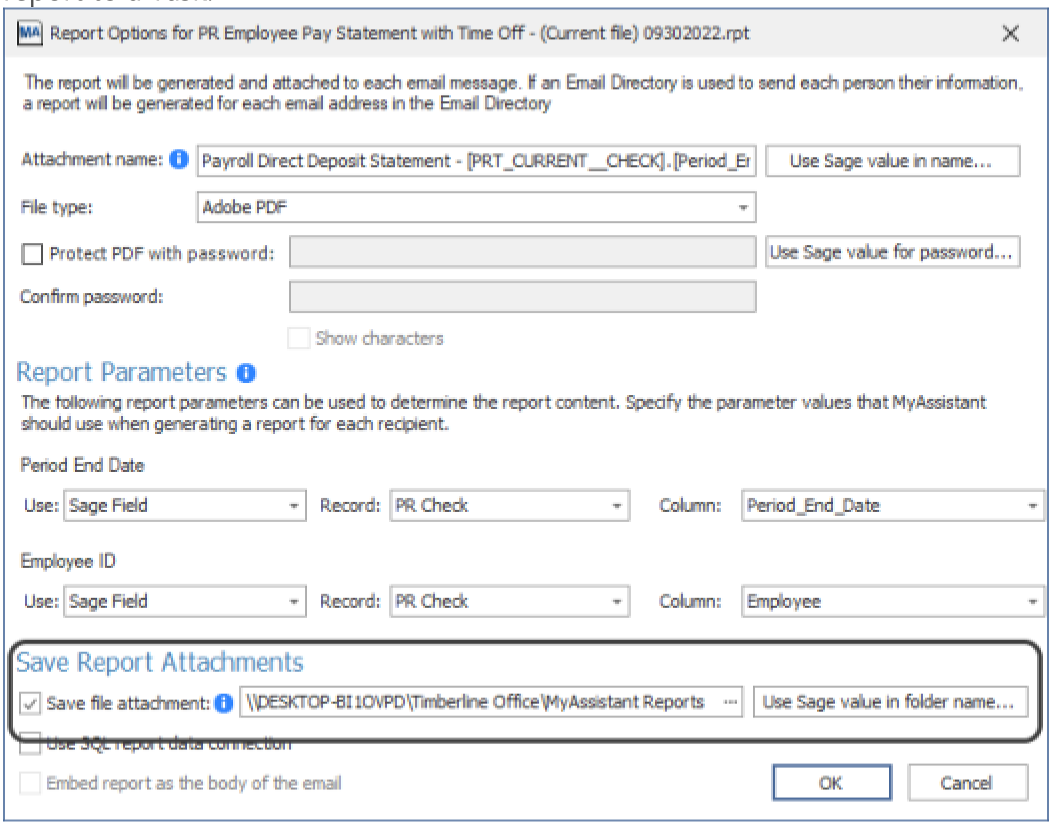
Many companies like to keep copies of the reports, documents and spreadsheets they send with MyAssistant. Some will just Cc or Bcc someone in the company, then set up a rule in the recipient's Outlook to automatically move the messages. Other companies will use MyAssistant to save copies of emailed attachments to a location on their server.

With MyAssistant, you can save a copy of any attached report, document or spreadsheet to a location on a server.

When using a MyAssistant Task that uses an Email Directory and attached report prompts to send each recipient reports with just their information, you can save each report in a unique location. This enables companies to be more organized

Key Pieces

Save Location: Also known as the "Save File Path", this is where you choose to save copies of the attachments sent by the Tasks. Since Tasks run and emails send from your server, most companies will choose to save copies of attachments to a location on the same machine. Where an attachment is saved is determined in the Report Options window after attaching a report to a Task:



NOTE: If you want to save copies of attachments to a server other than the one with the MyAssistant Server software installed, there are a couple things to consider:

5. The location needs to be accessible from the MyAssistant Server using what's called a UNC path
6. MyAssistant sends generates and sends emails and attached reports using a process on your server called a Windows service (named "ISDAdminSenderService"). Every Windows service have to run as a Windows user, and the ISDAdminSenderService may need to be updated to run as a Windows user with sufficient permissions to the other computer.

Folders Created based on Sage information: To help you stay organized and keep track of reports you've saved, MyAssistant can create folders based on the information in Sage fields. For example, if you're saving a copy of each Job Cost report sent for each Job, MyAssistant can create folders named after the Job number or Description.

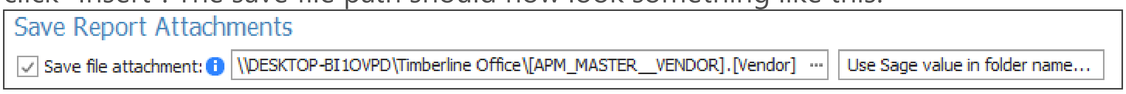
Attachment Name: This is what the name of the attachment will be once it's saved to a location on disk

Tip: Add a Sage field or MyAssistant formula (e.g. "Current Date" formula) to make the name of each attachment copy saved by the Task unique. If MyAssistant tries to save a copy of an attachment and finds another in the same location with the same name, it will overwrite the existing attachment with the new one

How to save reports and documents attached with the "Sage Report" or "Crystal Report" options:

MyAssistant can automatically create folders based on the values of Sage fields added to the save path. In your example, you can have MyAssistant use a unique folder for each Property. Here are the steps:

1. Select your activated MyAssistant Task & click “Open”
2. Click “Email” on the left side of the window that opens
3. Double-click on your report design in the “Attachments” section under the Subject line
4. Check the box for “Save file attachment” (or confirm it’s already checked) at the bottom of the window that opens
5. Select or confirm the current path where reports are currently being saved
6. Place your cursor at the end of the file path and press the “\” key on your keyboard
7. Click [Use Sage value in folder name…]
8. Choose the Sage field or MyAssistant formula you want to use to create folders and click “Insert”. The save file path should now look something like this:

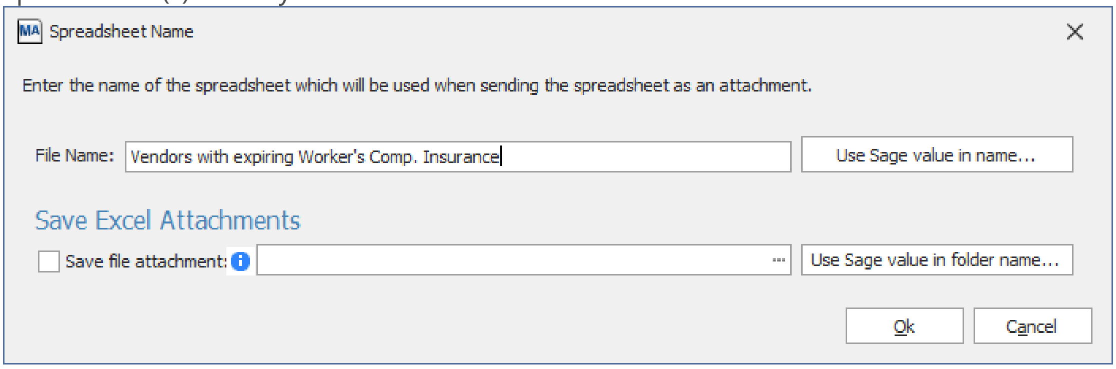


9. Repeat steps 7 & 8 if you’d like to use multiple Sage fields in the save file path
10. Click "OK" to close the Report Options window
11. Click "OK" to close Task Setup

How to Save Spreadsheets Created with MyAssistant Spreadsheet Templates:

MyAssistant can automatically create folders based on the values of Sage fields added to the save path. In your example, you can have MyAssistant use a unique folder for each Property. Here are the steps:

1. Select your activated MyAssistant Task & click “Open”
2. Click “Email” on the left side of the window that opens
3. Double-click on the spreadsheet template in the Attachments section under the Subject Line
4. Click the "Page Layout" tab of the ribbon and click "Rename Workbook"
5. In the window that opens, select the path where you want to save copies of the spreadsheet(s) sent by the Task



Related Links

Send a Spreadsheet Overview

Send a Spreadsheet

"From" Email Address

Companies often want to use MyAssistant to automate or work with multiple aspects of their business. As such, a common request is having MyAssistant send emails from different email addresses. With MyAssistant, you can send messages from different Email Addresses.

Keys for Multiple "From" Email Addresses

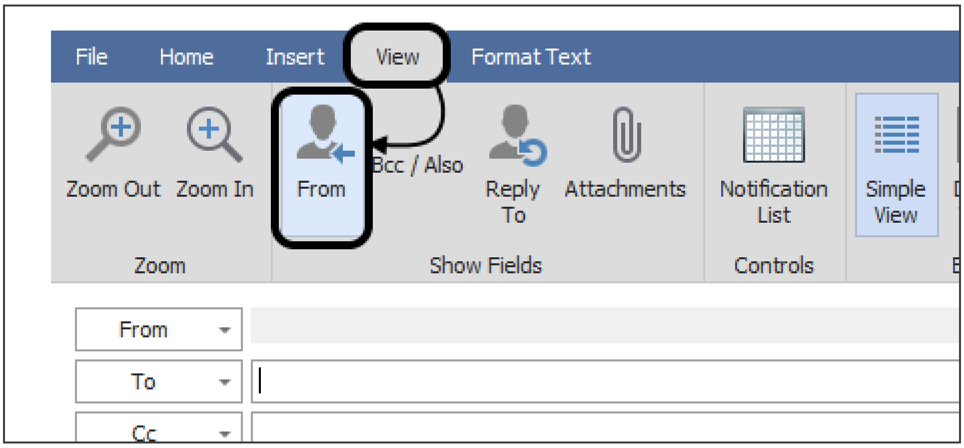
Setting up MyAssistant to use multiple emails: Part of the initial setup of MyAssistant is to determine what email address(es) MyAssistant will use to send emails. If MyAssistant was not initially set up to use multiple "From" email addresses, this can be updated in the Server Settings step in the MyAssistant Designer's options.

Selecting a "From" Email Address in Task Setup: Once MyAssistant has been set up to use multiple "From" email addresses, select which one to use in the Email step of Task Setup.

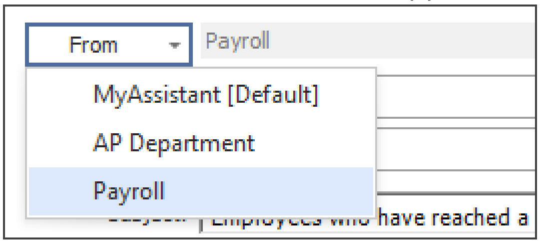
NOTE: If no "From" email address is specified in the Email Step of Task Setup, MyAssistant will use whichever email address is specified as the "Default". Changing which "From" email address is the default can also be done in the Server Settings step in the MyAssistant Designer's Options.

To Change the "From" email on a Task

1. Get to the Email step of the MyAssistant Task. You'll go through this step when initially setting up a Task, or by clicking on "Email" on the left side of the window when opening an already-activated Task.
2. Click the "View" tab of the button bar at the top of the window
3. Click the **From** button to add the "From" line above the "To" line



4. Click the "From" button that's appeared and select the email that this Task should use



5. Finish Task Setup or click "OK" in the bottom-right to save your changes

Task Options

This step is used to set or confirm several options when setting up a MyAssistant Task.

Notification Frequency

The Sage information found by a Task are called "Notifications"; and this step controls how many emails recipients are sent about each Notification. The two options are:

Each Time the Task Runs: Recipients receive all Notifications found by the Task every time it runs.
For example: a Task looking at all JC Jobs finds 50 jobs, then emails you a list of all 50 Jobs. The Task is run again a week later and finds 52 Jobs -- you are then sent a list of 52 Jobs.

Once: Recipients are emailed each Notification once. Also referred to as "Notify Once", this is often used when only wanting to be sent new information in Sage.

For example: The first time a Task looking at all JC Jobs is ran, it finds and sends you a list of 50 Jobs. The following week, the Task runs again and finds 52 Jobs. This time, you are only sent the two new Jobs, because you were previously notified of the other 50.

> **Reminder:** Regardless of the option selected, all Notifications found by the Task will appear in the MyAssistant software after the Task is run.

Separate Email for Each / "Send Once Per"

This lets you send information normally in one email in separate messages. When this feature is used, MyAssistant will send recipients a separate email for each unique value in the Sage field or MyAssistant formula you select.

To use, click the dropdown and select the Sage field or formula you want to use to create separate emails.

To clear the selection, click the eraser icon to the right of the dropdown.

> **Tip:** When using the "Send Once Per" feature, any attached reports being used to send each recipient only their information should have a prompt for the same Sage field or MyAssistant formula selected.

Send in Daily Summary

Tasks that send a list in an email and have no attachments can be compiled into a once-a-day "Daily Summary" email sent to recipients.

Keep Closed Notifications

This controls whether or not MyAssistant keeps a record of the Notifications that met the Task's criteria on a previous run, but not the most recent run.

Important: This box must be checked if you're using run the "Notify Once" feature (set in Notification Frequency)

Don't Display in Live Tile

Some companies want multiple people to be able to run MyAssistant Tasks, but not create or modify them. For employees who only can run MyAssistant Tasks and send emails, companies can purchase licenses for the "MyAssistant Live Tile". This checkbox controls whether or not a Task that a company has set up can be seen or run by employees with the MyAssistant Live Tile.

Task Name

The name of the Task as it will appear in MyAssistant. New Task names will prefill with the Subject line entered in the Email step, but can be changed.

Category

MyAssistant Tasks can be placed in Categories to keep similar Tasks together and help you stay organized. Tasks can be placed in the existing Categories that come with MyAssistant, or you can create your own.

Subcategory

Subcategories are used within in Categories to keep similar Tasks together to an even greater level of organization (e.g. keeping all Tasks that have to do with HR within the "HR" subcategory inside the "Payroll" category. You can use existing Subcategories create your own in existing Categories or in Categories you create.

Description

An optional field that allows you to write a brief summary of what a Task looks for/sends and the intended recipients.

Email Directories

An Email Directory tells MyAssistant what email address to use to send each recipient only their information. This means that MyAssistant can do things like send each Project Manager the over-budget Cost Codes on only their jobs, send each tenant only their monthly rent statement, send each employee their weekly pay statement, or send each customer information about only their past-due invoices.

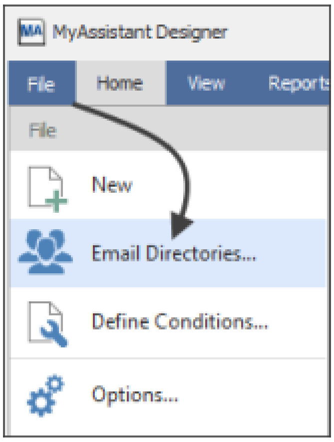
How to create an Email Directory

There are two ways to set up an Email Directory. You can enter email addresses in a field in Sage 300 CRE, or you can enter email addresses in the MyAssistant Email Directory setup.

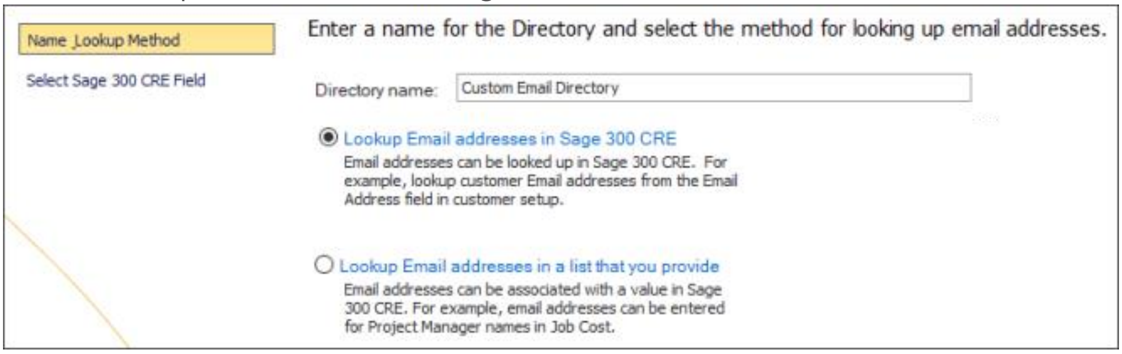
Option 1: Look up Email Addresses in Sage

If you're entering email addresses in a specific location in Sage, MyAssistant can look at that location for its Email Directory.

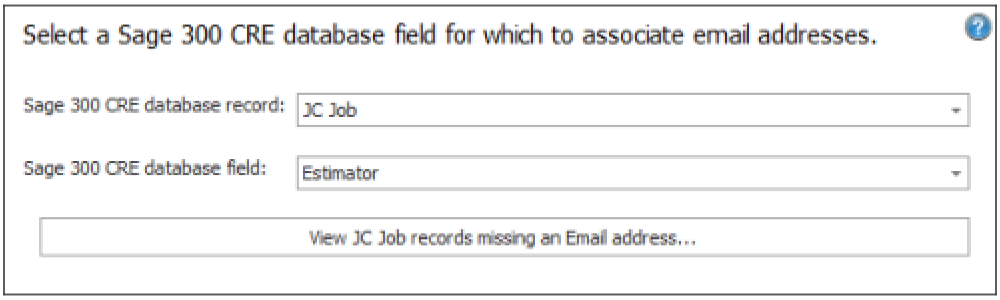
1. Start the MyAssistant Designer
2. Select File > Email Directories



3. Click "New" in the window that opens
4. Enter a name for the Email Directory in the window that opens. Each Email Directory must have a unique name.
5. Select "Lookup Email addresses in Sage 300 CRE" and click "Next"



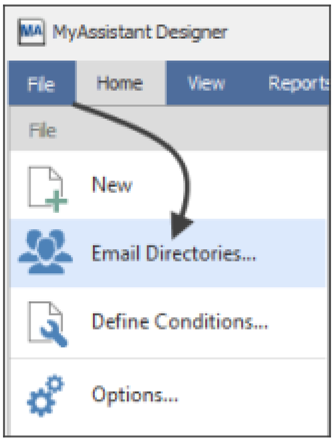
6. Select the Sage 300 CRE data record where the email address will be entered
7. Select the field on the selected Sage 300 CRE record where email addresses will be entered



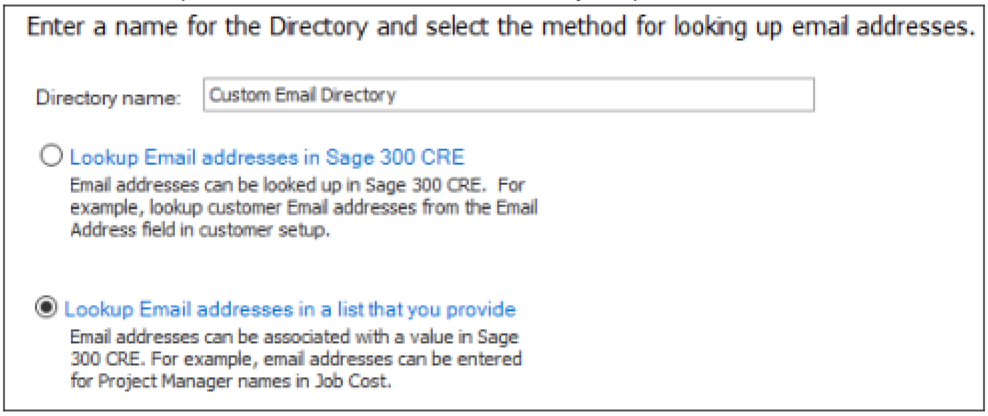
8. Click View <Record Name> records missing an Email address if you would like to test the selected field for blanks
9. Click Finish

Option 2: Enter email addresses in MyAssistant

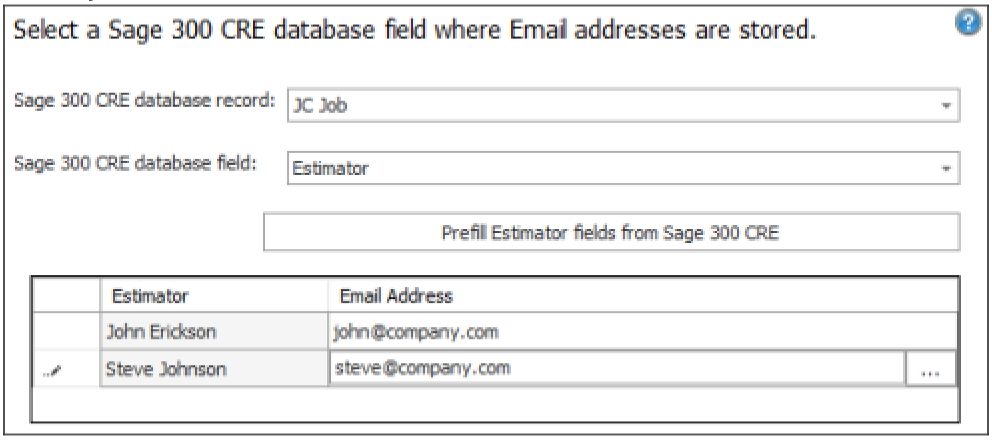
1. Start MyAssistant Designer
2. Select File > Email Directories



3. Click New
4. Enter a name for the Email Directory in the window that opens. Each Email Directory must have a unique name.
5. Select "Lookup Email addresses in a list that you provide" and click "Next"



6. Select the Sage 300 CRE data record that will be used to look up email addresses
7. Select the Sage 300 CRE data field that will be used to look up email addresses
8. Click "Prefill <Field Name> fields Sage 300 CRE"
9. Select your data folder if needed then click OK



10. For each value, type an email address or select the email address from your Outlook by clicking the "..." button
11. Click View <Record Name> records missing values if you would like to test the selected field for blanks
12. Click Finish

Note: MyAssistant automatically filters what Email Directories are available on a Task based on the data relationship between where the Email Directory looks up information and what information the Task is monitoring. If a Task is monitoring information that doesn't have a direct relationship to the location where an Email Directory is looking for email addresses, the Email Directory can't be added to the Task.

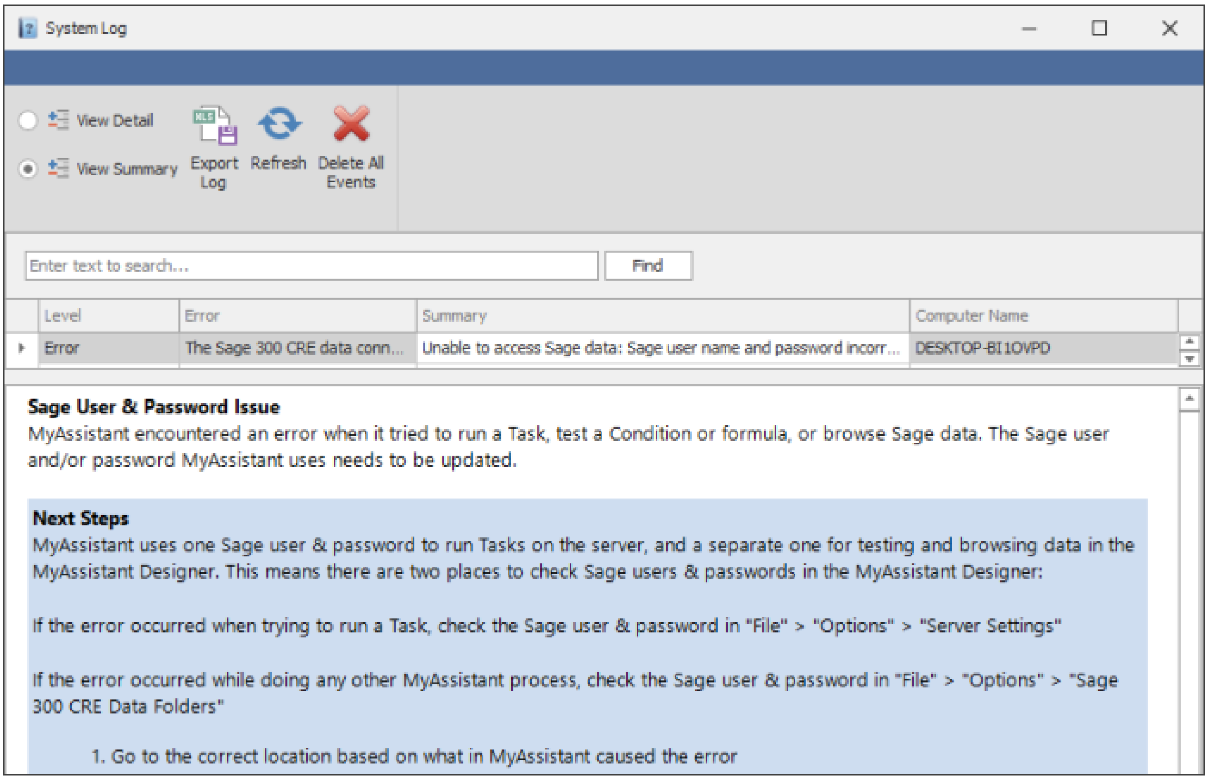
Related Links

Send Reports & Documents Overview

Send Each Person Their Information

Error Log

If an error occurs or if you're not sure if something is working correctly, the MyAssistant Designer has a System Log that identifies and explains (in non-technical terms) what, if anything, happened. You can view the System Log by opening the MyAssistant Designer, clicking File, and selecting "System Log".



When the log opens, events will be sorted with the most recent at the top. In most cases you can solve the common issues yourself with the step-by-step instructions provided. If someone else needs to review the log, you can export a copy by clicking the "Export Log" button in the ribbon.

Settings

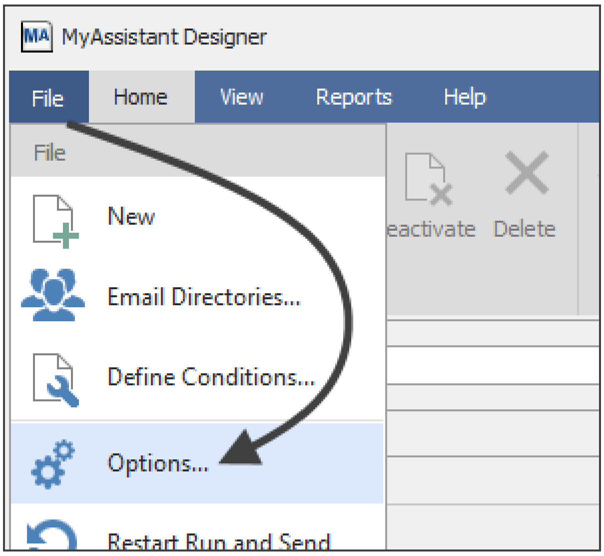
MyAssistant has two parts: the MyAssistant Server software and the MyAssistant workstation(s). After installing and configuring the MyAssistant Server software, the next thing that will be installed will be MyAssistant on any workstations where it will be used.

After a MyAssistant workstation has been installed, it will need to be configured -- this section covers the steps involved in configuring a MyAssistant workstation, as well as the information that can be updated afterwards from within a MyAssistant Designer.

Configuring a MyAssistant workstation involves the following steps:

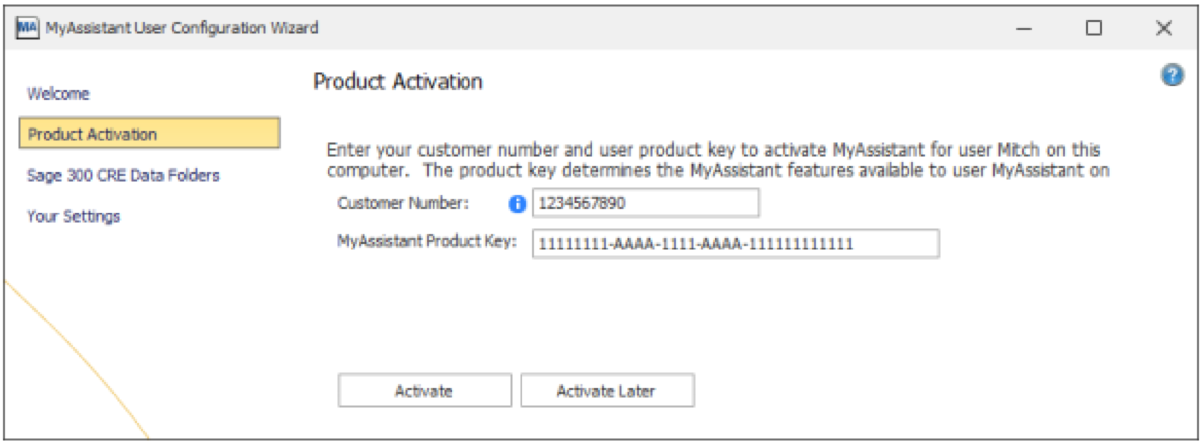
1. Activate the MyAssistant workstation license (either MyAssistant Designer or MyAssistant)
2. Enter the Sage user name and password MyAssistant will use for local processes (e.g. browsing data)
3. Enter information about yourself

Reviewing the above items and more after configuring a MyAssistant Designer can be done by opening the MyAssistant Designer, clicking "File" and selecting "Options":



Activating MyAssistant

MyAssistant workstations must be activated to use the software. Each MyAssistant workstation is tied to a Windows user on a computer. Make sure that you are logged in as the Windows User who will use MyAssistant prior to activation. This may not the same as the Windows account used to install the MyAssistant workstation.



MyAssistant product keys are available in the Sage Customer Portal where you get your Sage product keys.

Enter the following information in their respective fields:

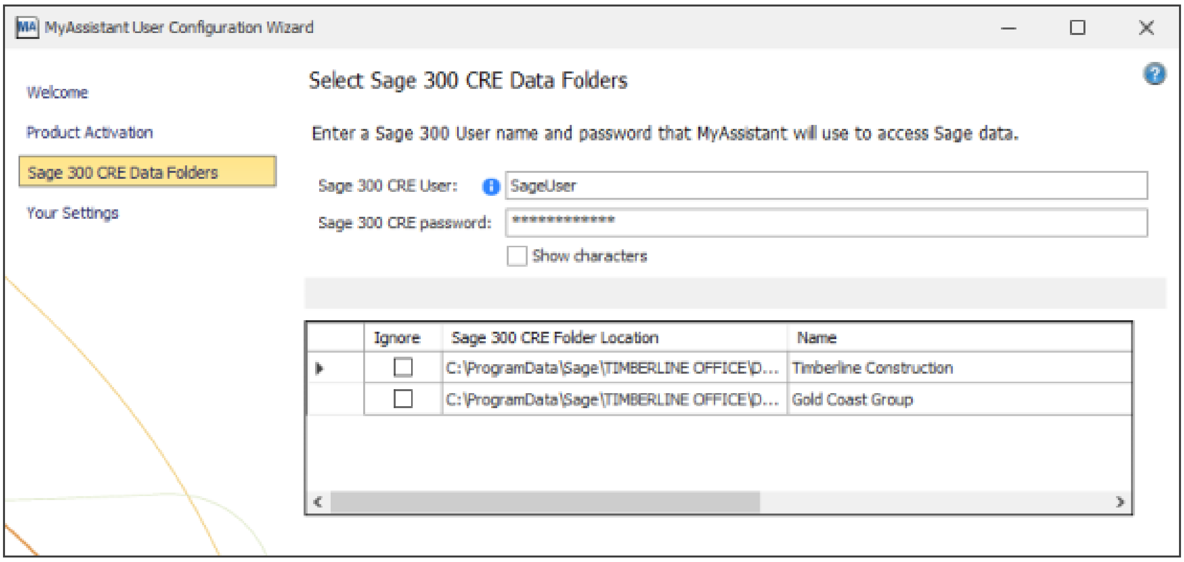
- **Customer Number:** Sage customer number assigned to your company. This can be found in the Sage Customer Portal, or by opening a Sage 300 application and clicking Help > About [Application Name]
- **Product Key:** MyAssistant Workstation product key. This will be one of two licenses:

  MyAssistant Designer – The full version of MyAssistant. The MyAssistant Designer provides the ability to create, activate and change Tasks; as well as run Tasks and view what was found.

  MyAssistant – MyAssistant has the ability to run MyAssistant Tasks on demand and view what was found.

Sage 300 Data Folders

This step controls what Sage user MyAssistant will use locally, and confirm the data folder(s) MyAssistant will monitor:



Specify Sage 300 CRE data folder locations
The data folders specified during the MyAssistant Server Configuration will be listed in the grid. Click in the grid to select any data folder paths that do not prefill.

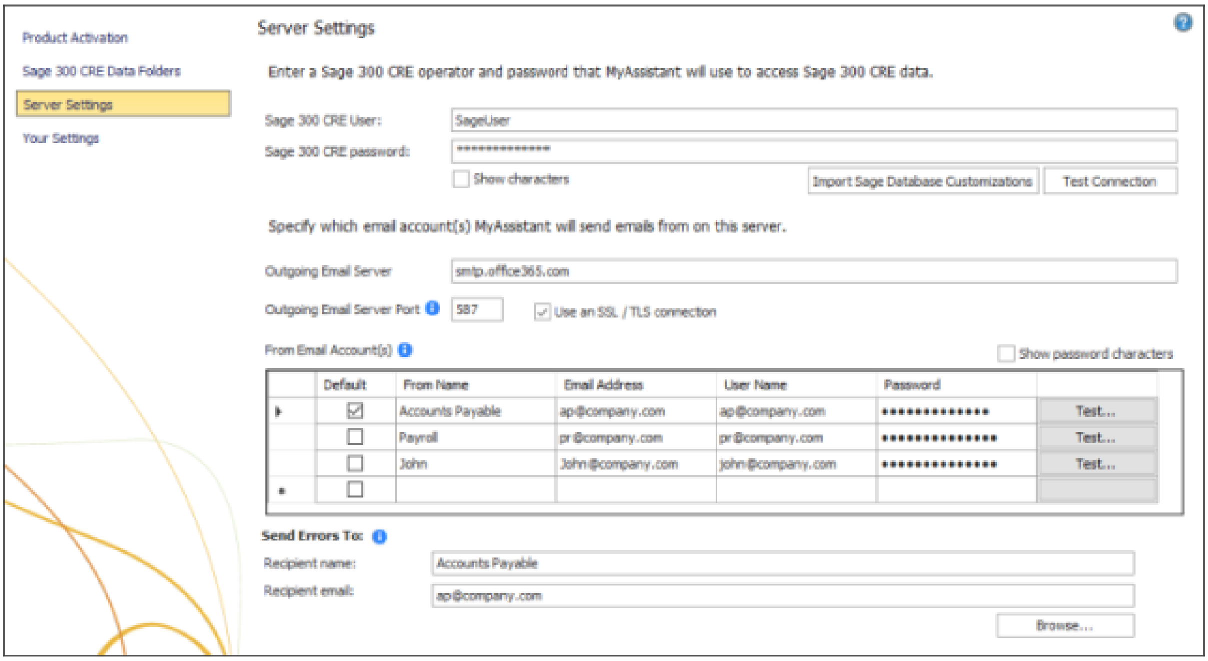
Check the "Ignore" checkbox for any Sage 300 CRE data folders that should not be accessed on this workstation.

Sage 300 CRE User and Password
Enter the Sage User & password for the person using MyAssistant. This will be used to:

- Access Sage 300 CRE reports that can be attached to Tasks
- Test Task Conditions
- Test MyAssistant Formulas
- Preview MyAssistant Spreadsheet Templates

Server Settings

This controls a variety of MyAssistant Server settings that can be updated from the MyAssistant Designer.



Note: This step is only available in the MyAssistant Designer by going to File > Options and clicking on "Server Settings". It will **not** be a step when configuring a MyAssistant workstation.

Sage User & Password

In order to monitor information in Sage, MyAssistant needs a user and password in order to access that information. To do that, you'll enter the following information in the specified fields:

- **Sage 300 CRE User** – Enter the Sage 300 CRE user MyAssistant will use to access Sage information
- **Sage 300 CRE password** – Enter the password associated with the Sage user entered

This Sage user & password is different than what's entered in the Sage 300 Data Folders step in that this is the user & password that will be used to run Tasks and access information on the server.

Important: Best practices are to use a Sage 300 CRE user with a password that does not expire. Also, using an Application Administrator-level Sage user ensures MyAssistant has sufficient access to all the Sage information you want to monitor.

Import Sage Database Customizations

MyAssistant automatically imports custom fields and descriptions when monitoring one Sage data folder. If MyAssistant is monitoring multiple folders, you will be prompted to select which folder's customizations to import.

Note: Only one Sage folder's custom fields & descriptions can be in MyAssistant at a time. Importing another Sage data folder's customizations will overwrite previous Sage customizations in MyAssistant.

When you create a new custom field or change a field's description in Sage 300 CRE, you must re-run the import process for MyAssistant to recognize the change.

Email Settings

This section lets you update the information MyAssistant needs to send email messages (i.e. the outgoing mail server information and/or the "From" email addresses).

Mail Server Settings

This is the information that must be the same for all email accounts MyAssistant sends emails from:

- **Outgoing Email Server** – Confirm your outgoing server name with your IT/mail server administrator
- **Outgoing Email Server Port** – The port used if the outgoing email server requires a port other than 25
- **"Use an SSL/TLS connection" checkbox** – will be checked if your email server requires a secure connection (e.g. a password is required in the grid below)

From Email Account(s)

These are the accounts MyAssistant will send emails from when running Tasks. This section allows you to review & update:

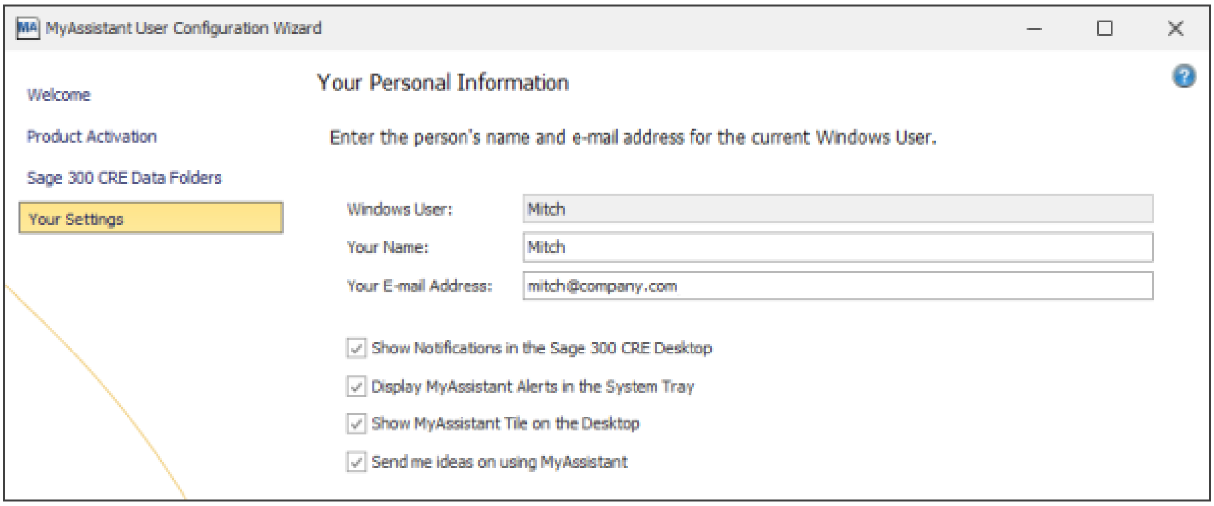
- **Default Checkbox** – This controls which account MyAssistant sends emails from when a "From" email address isn't specified on a Task.
- **From Name** – This name is displayed in the recipient's inbox
- **Email Address**
- **User Name** – In most cases the user name is the email address. Confirm with your email server administrator
- **Password**

Send Errors To

Should an error occur and MyAssistant is able to send an email about it, it will send a message to the person specified in this section. Best practice is to send error messages to whoever has the MyAssistant Designer.

Your Settings

This step is for entering information about the person using MyAssistant & what additional options, if any, they would like to enable.



As part of the configuration you will fill out the following fields:

- **Your Name** - The name of the person using MyAssistant
- **Your Email Address** - Your email address

You'll also check or uncheck boxes for a number of additional settings:

- **Show Notifications in the Sage 300 Desktop** – Controls if activated MyAssistant Tasks and their results (called "Notifications") appear in the Sage Desktop software in the Applications list

- **Display MyAssistant Alerts in the System Tray** – Controls if MyAssistant appears in the Windows System Tray (i.e. the bottom-right section of the Windows task bar next to the current date and time)

- **Show MyAssistant Tile on the Desktop** – Controls if the "MyAssistant Live Tile" appears on your Windows desktop. The Live Tile is a way to quickly look up information in Sage and run Tasks not on schedules without having to open the full MyAssistant software.

- **Send me ideas on using MyAssistant** – Controls if you are emailed (at the address specified above) new ideas on how to use MyAssistant.

MyAssistant Server Configuration

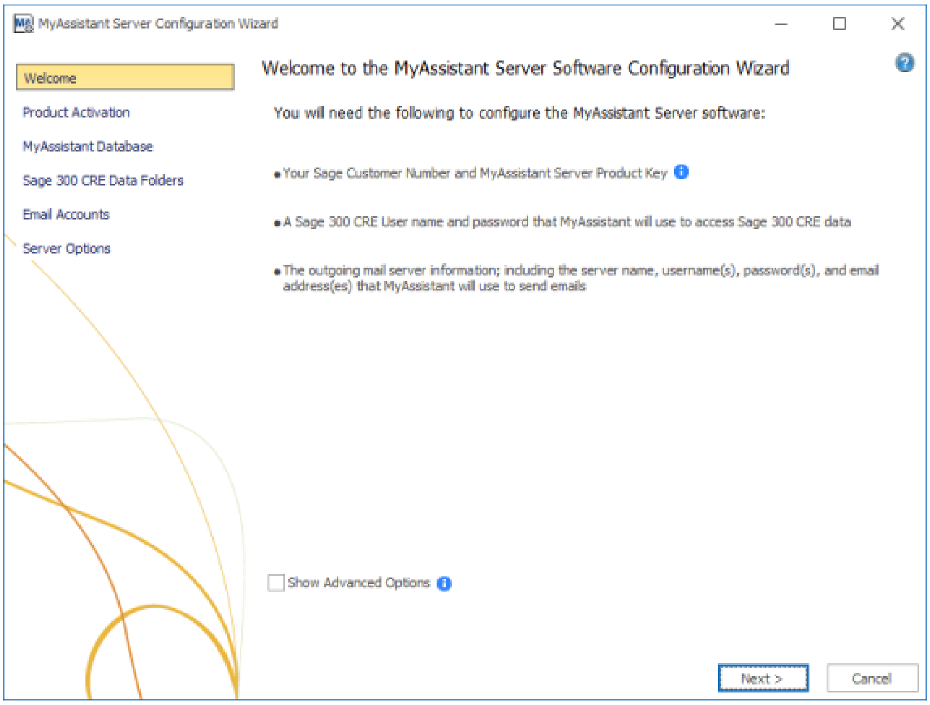
MyAssistant has two parts: the MyAssistant Server software and the MyAssistant workstation(s). When initially setting up MyAssistant, the first thing installed will be the MyAssistant Server software.

After the MyAssistant Server has been installed, it will need to be configured -- this section covers the steps involved in configuring the MyAssistant Server for the first time, as well as what can be changed after the initial configuration.

Configuring the MyAssistant Server involves the following steps:

1. Activate the MyAssistant Server
2. Select which prebuilt "Tasks" (Construction or Real Estate) to use in MyAssistant
3. Enter the Sage user name and password MyAssistant will use to access Sage 300 CRE data
4. Choose which Sage 300 CRE data folders MyAssistant will monitor
5. Enter the email address(es) MyAssistant will use to send emails
6. Specify MyAssistant Server settings

When you configure the MyAssistant Server, you'll start on a "Welcome" screen with a couple reminders of what you'll need and an option to show the Advanced Options.

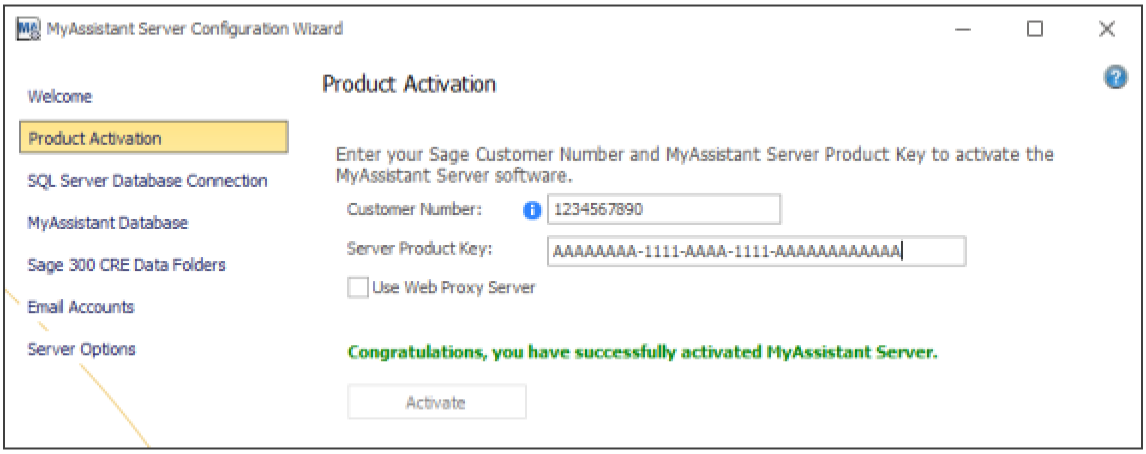


MyAssistant Server Activation

This step covers activating the MyAssistant Software and any Web Proxy Settings that will be used. In this step, you will enter the following information in their respective fields:

- **Customer Number:** Sage customer number assigned to your company. This can be found in the Sage Customer Portal, or by opening a Sage 300 application and clicking Help > About [Application Name]

- **Product Key:** The product key for activating the MyAssistant Server. This is the only



When configuring the MyAssistant Server, click "Activate" after entering the above information. Click "Next" when you see a message on the screen that the software is activated.

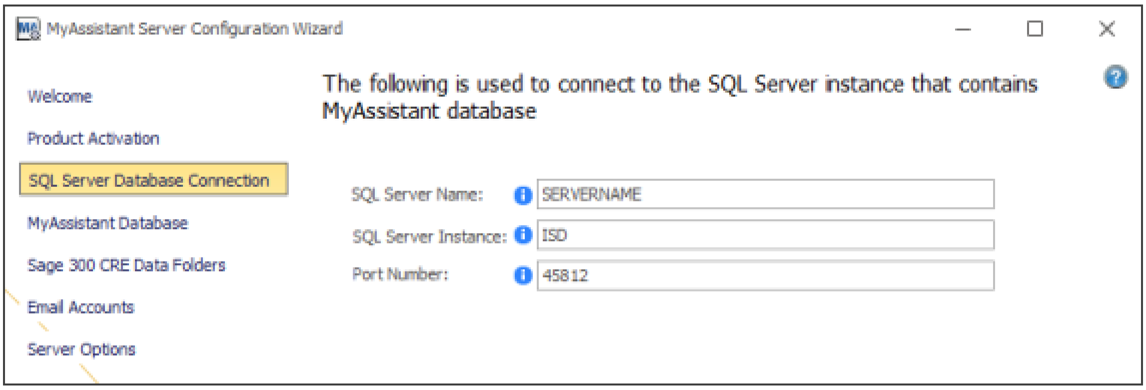
Note: The Web Proxy Server checkbox will only appear if you selected Show Advanced Options in the Welcome step. If you use a Web Proxy Server, check the box displayed under the Server Product Key field and provide the requested information.

MyAssistant Database Connection

MyAssistant stores information about your Tasks, Task schedules, Email Directory information, copies of attached Crystal Reports and more in its own database. This database exists in a type of software called Microsoft SQL Server. This step of the Server Configuration is where you name the server where the SQL instance exists, the name of the SQL Server instance, and what port number should be used to connect to the database.

If MyAssistant is using the SQL Server instance that is installed as part of a normal MyAssistant installation, this information will be prefilled and the step will be skipped in the initial MyAssistant Server Configuration.

If the "Show Advanced Options" checkbox is checked on the first step of the MyAssistant Server Configuration, or you're using a different instance of SQL Server, you will need to confirm/enter the information required in this step.

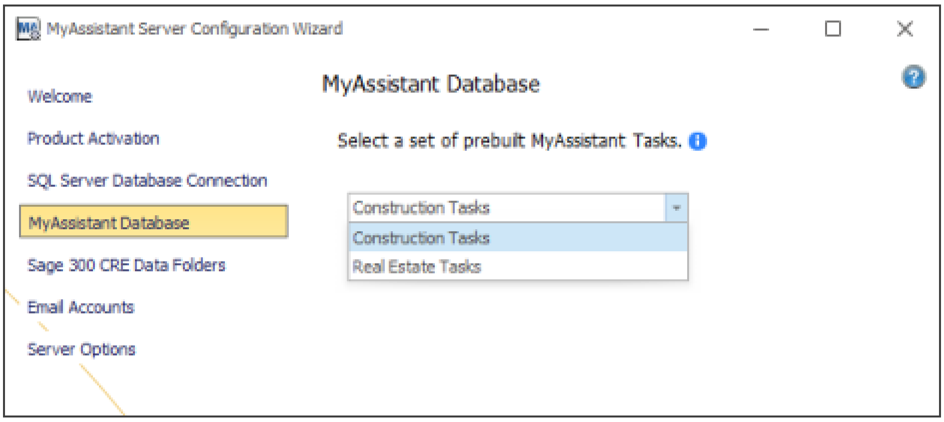


Warning: It is *strongly* recommended that the information in this step is not changed. Changing any information could break the connection between the MyAssistant software and its database.

MyAssistant Database

When initially setting up MyAssistant, you will have the option to select which prebuilt MyAssistant Tasks should be set up. It's recommended you choose based on your business and what you primarily want to use MyAssistant for, as this selection is permanent and cannot be changed.

Check the Documents folder in the MyAssistant install files to see what Tasks are set up with each selection.

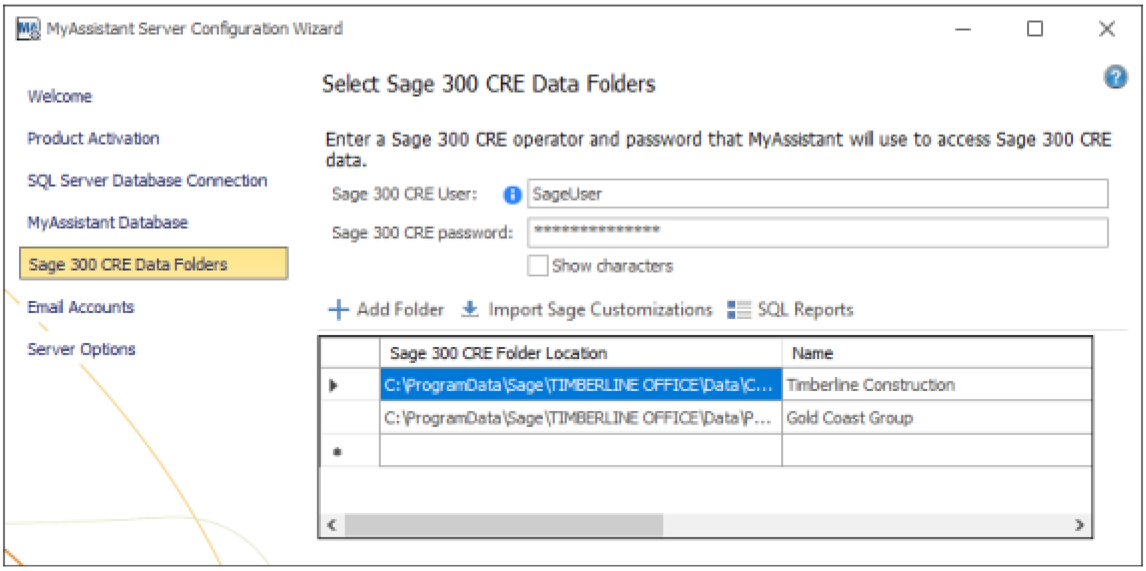


Note: This step will only appear when configuring the MyAssistant Server and creating a MyAssistant database for the first time.

Click "Next" at the bottom of the window after selecting your prebuilt Tasks. MyAssistant will then begin creating its database and advance to the next step when it is ready.

Sage Login and Data Folders

MyAssistant can monitor and automatically report on multiple Sage data folders, or just one. In this step you select which data folders MyAssistant will monitor, as well as the Sage user and password MyAssistant will use to access that information.



Sage User & Password

In order to monitor information in Sage, MyAssistant needs a user and password in order to access that information. To do that, you'll enter the following information in the specified fields:

- **Sage 300 CRE User** – Enter the Sage 300 CRE user MyAssistant will use to access Sage information
- **Sage 300 CRE password** – Enter the password associated with the Sage user entered

Important: Best practices are to use a Sage 300 CRE user with a password that does not expire. Also, using an Application Administrator-level Sage user ensures MyAssistant has sufficient access to all the Sage information you want it to monitor.

If the need should arise, the Sage user & password information can be updated from the MyAssistant Designer. To update, open the MyAssistant Designer, click File > Options, and select "Server Settings" on the left side of the window that opens.

Sage Data Folders

This controls which Sage data folders MyAssistant can monitor. MyAssistant can only run Tasks for data folders in this list.

When configuring the MyAssistant Server: Click "Add Folder" and select the first Sage Data folder you want to monitor. Repeat as desired until all Sage data folders are added.

Note: If the MyAssistant Server is not on the same computer as the Sage 300 CRE Server, make sure the data folder paths are UNC paths (i.e. the paths begin with "\\") and do not use mapped drives.

If you need to change which Sage data folders MyAssistant is monitoring after the initial configuration, open the MyAssistant Configuration Manager on the server to change the data folders being monitored.

Import Sage Customizations

MyAssistant automatically imports custom fields and descriptions when monitoring one Sage data folder. If MyAssistant is monitoring multiple folders, you will be prompted to select which folder's customizations to import.

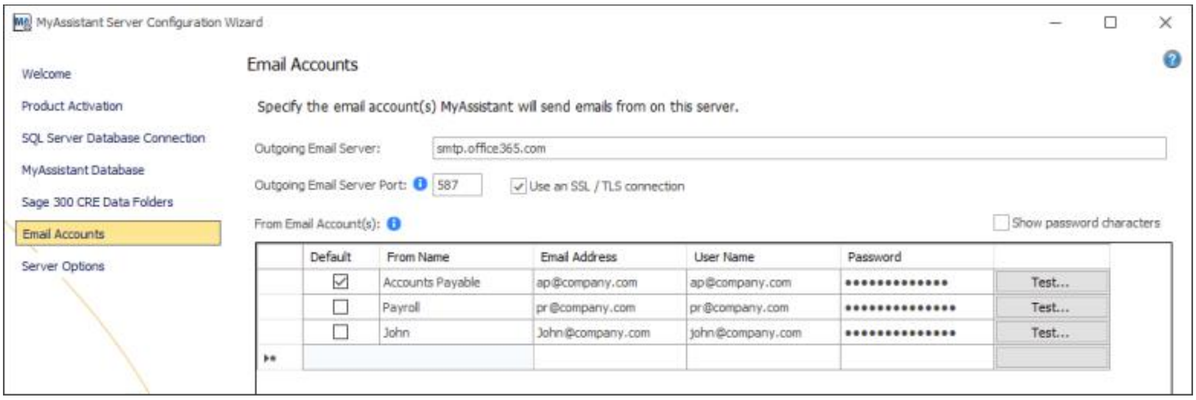
Note: Only one Sage folder's custom fields & descriptions can be in MyAssistant at a time. Importing another Sage data folder's customizations will overwrite previous Sage customizations in MyAssistant.

When you create a new custom field or change a field's description in Sage 300 CRE, you must re-run the import process for MyAssistant to recognize the change. This can be done from inside the MyAssistant Designer by opening the MyAssistant Designer, clicking File > Options, and selecting "Server Settings" on the left side of the window that opens.

Email Accounts

MyAssistant communicates information by sending emails. This step covers the information MyAssistant needs to send messages from the desired email account(s).

Note: If this information is not available when configuring the MyAssistant server, you can enter it later in the MyAssistant Designer. To update, open the MyAssistant Designer, click File > Options, and select "Server Settings" on the left side of the window that opens.



Outgoing Mail Server

The following mail server information must be the same for all email addresses that MyAssistant will use to send emails:

- **Outgoing Email Server** – Confirm your outgoing server name with your IT/mail server administrator. All email addresses entered in this step must use the same outgoing mail server.
- **Outgoing Email Server Port** – Enter the port to use if the outgoing email server requires a port other than 25
- Check the box for Use an SSL/TLS connection if your email server requires a secure connection.

From Email Account(s)

Companies often want to use MyAssistant to automate or work with multiple aspects of their business. As such, a common request is having MyAssistant send emails from different email addresses. With MyAssistant, you can send messages from different Email Addresses.

Enter the following information for each Email Address that you want MyAssistant to use:

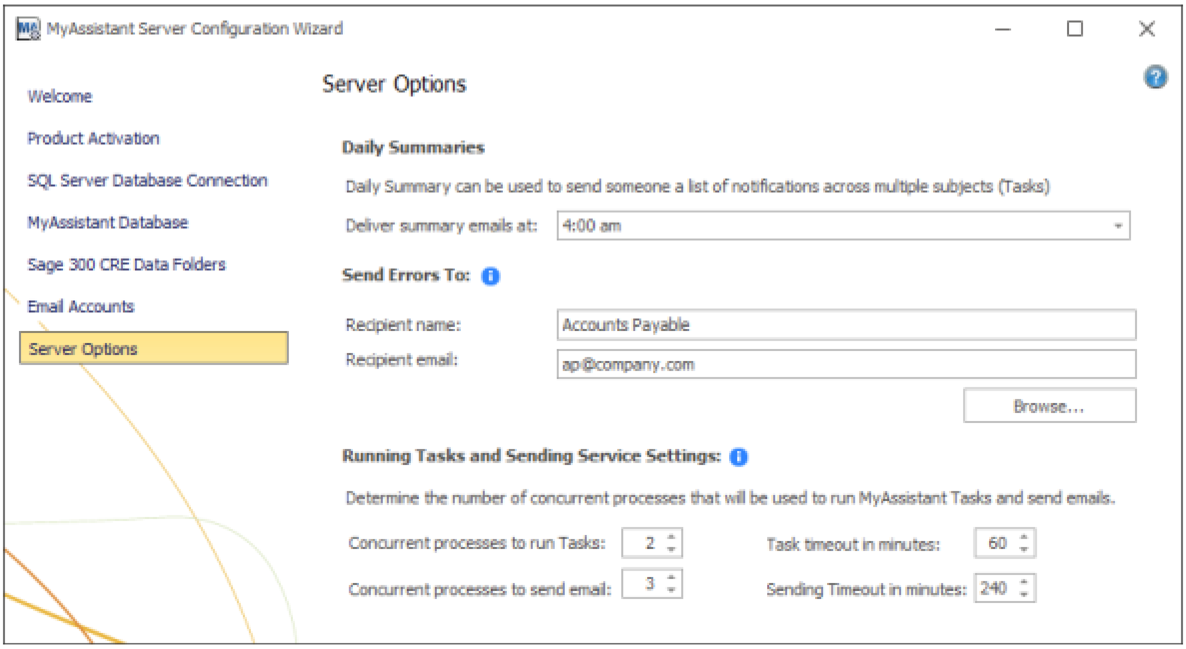
- **Default Checkbox** – This controls which account MyAssistant sends emails from when a "From" email address isn't specified on a Task.
- **From Name** – This name is displayed in the recipient's inbox
- **Email Address**
- **User Name** – In most cases the user name is the email address. Confirm with your email server administrator
- **Password**

Important: You may need to configure SMTP relays to allow the MyAssistant Server to send email messages. Consult your mail server administrator to confirm your settings and/or configure your relays.

When configuring the MyAssistant Server, click "Next" when you're ready to proceed to the final step. MyAssistant will then test the email settings for every address entered in the grid and alert you if there are any errors.

Server Options

This step covers final options that need to be confirmed for the MyAssistant Server Configuration.



Daily Summaries Time
Tasks that send a list in an email and have no attachments can be compiled into a once-a-day "Daily Summary" email sent to recipients. This option controls when Daily Summary emails are sent each day (if there are any to send). Please note this time should be after all of your Tasks have finished running for the day.

Controlling if a Task's information is included in Daily Summary email is determined in the Task Options step of each Task's setup.
Send Errors To
Should an error occur and MyAssistant is able to send an email about it, it will send a message to the person specified in this section. Best practice is to send error messages to whoever has the MyAssistant Designer.

This information can be updated at a later date in the MyAssistant Designer by opening the MyAssistant Designer, clicking File > Options, and selecting "Server Settings" on the left side of the window that opens.

Running Tasks and Sending Service Settings
MyAssistant runs Tasks and sends emails (i.e. Windows Services) on the server. These processes are scalable to increase performance, and can auto-correct if they stop working.

MyAssistant's Windows Services (named "ISDAdminTaskService" and "ISDAdminSenderService") start other processes named "TaskRunner*32". Each process uses 30-50Mb of memory when idle. Many variables affect system resources when Tasks run and emails are sent, including:

- The available server memory
- Disk drive performance
- Other server demands at the time the MyAssistant Tasks are run or emails are being generated. For example, running Tasks at night may allow MyAssistant to use additional server resources.

You can perform the following to determine the optimal number of processes:

- Complete the MyAssistant Server Configuration Wizard with the default settings and the MyAssistant Workstation installation.
- Activate two MyAssistant Tasks you will regularly use.
- Monitor the server memory usage and disk queue lengths when the Tasks are run concurrently.
- Open the MyAssistant Configuration Manager and increase or decrease the number or processes based on the results of this test and available server resources.

