

Sage MyAssistant Version 23.1

Release Highlights



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Sage MyAssistant version 23.1

Release Highlights

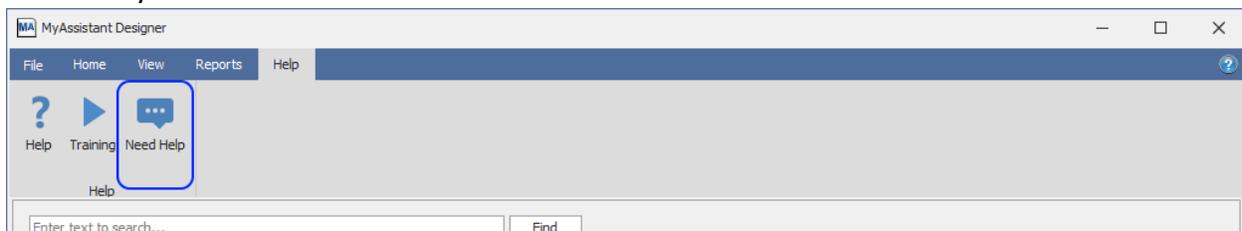
Sage 300 MyAssistant 23.1 provides customer-requested enhancements that can save time by proactively monitoring your business and automatically providing your team with needed information.

MyAssistant 23.1 Highlights include:

- A new option that exports information in Sage to CSV or Text files for use in other software. Examples include:
 - Positive Pay files to upload to banks
 - Job Cost Transaction import files for overhead, burden, or other entries
 - Certified report and lien waiver tracking systems
- Creating and sending spreadsheets in a password-protected PDF file
- Consolidating and distribute information from multiple Sage data folders in a single spreadsheet
- A more comprehensive Task Condition Preview with a count to ensure they're getting the correct information
- A quick way to view when each Task is scheduled to run from the main Task list
- Additional quick-reference material to solve problems and learn more about MyAssistant
- New ways to search for Sage information in the new English-like Condition option
- An improved installation experience with reminders to update select MyAssistant components (Windows Services)
- Easily transition to version 23.1 with your "Tasks" auto-upgraded to work with the new version
- Fixed a variety of issues in the Spreadsheet Template Designer, Email Directories and Task Setup

NOTE: MyAssistant 23.1 is compatible with Sage versions 20.5 or later. You don't need to upgrade your Sage software to upgrade to MyAssistant 23.1. All of your existing MyAssistant Tasks will be automatically upgraded.

Please contact your local Sage business partner or send a note using the "Need Help" button on the Help menu in MyAssistant for more information.



The following pages outline MyAssistant 23.1 and 22.1's enhancements.

Create and Send CSV or Text Files

MyAssistant 23.1 features the ability to easily create CSV (comma-separated values) and text files using MyAssistant Spreadsheet Templates. This allows for the creation of documents like Positive Pay files that are uploaded to banks, Transaction files that can be imported for things like overhead on JC Jobs, and more.

These new “File Type” options are found when saving a new Spreadsheet Template on a MyAssistant Task. Updating an existing Spreadsheet Template to send something other than an Excel document can be done by performing the following:

1. Open the MyAssistant Task
2. Double-click the MyAssistant Spreadsheet Template in the Attachments section of the Email Step of Task Setup
3. Click the “Page Layout” tab of the ribbon, then click the “Rename Workbook” button
4. Change the File Type, then click “OK” to save changes

The screenshot shows a dialog box titled "Spreadsheet Options" with a close button (X) in the top right corner. The main instruction reads: "Enter the name of the spreadsheet which will be used when sending the spreadsheet as an attachment." Below this, there are several input fields and options:

- File Name:** A text box containing "Overhead Costs" and a button labeled "Use Sage value in name...".
- File type:** A dropdown menu currently showing "CSV (comma separated values)", which is highlighted with a blue border.
- Protect PDF with password:** A checkbox that is unchecked, followed by a text box and a button labeled "Use Sage value for password...".
- Confirm password:** A text box.
- Show characters:** A checkbox that is unchecked.
- Save Excel Attachments:** A section header in blue text.
- Save file attachment:** A checkbox that is unchecked, followed by an information icon (i), a text box, an ellipsis button (...), and a button labeled "Use Sage value in folder name...".

At the bottom right, there are two buttons: "Ok" and "Cancel".

Quick Report PDFs from Spreadsheet Templates

You can now quickly generate and send PDF reports by using a Spreadsheet Template in MyAssistant 23.1.

This lets you create and send reports to send each person a PDF of only their information.

To send a PDF, choose “PDF” from the “File type” dropdown when saving a MyAssistant Spreadsheet Template.

When choosing to send a PDF, you can also set a password to open the file. This is in addition to MyAssistant’s existing ability to password-protect Excel spreadsheets for opening and/or editing.

Consolidate Information from Multiple Sage Data Folders

With MyAssistant 23.1, a Task looking up information from multiple Sage data folders can create and send one spreadsheet with all the information.

This is controlled by a check box that appears when saving a MyAssistant Spreadsheet Template (which MyAssistant uses to create spreadsheets):

The screenshot shows the 'Spreadsheet Options' dialog box. It has a title bar with 'MA Spreadsheet Options' and a close button. The main text says 'Enter the name of the spreadsheet which will be used when sending the spreadsheet as an attachment.' Below this are several fields and options:

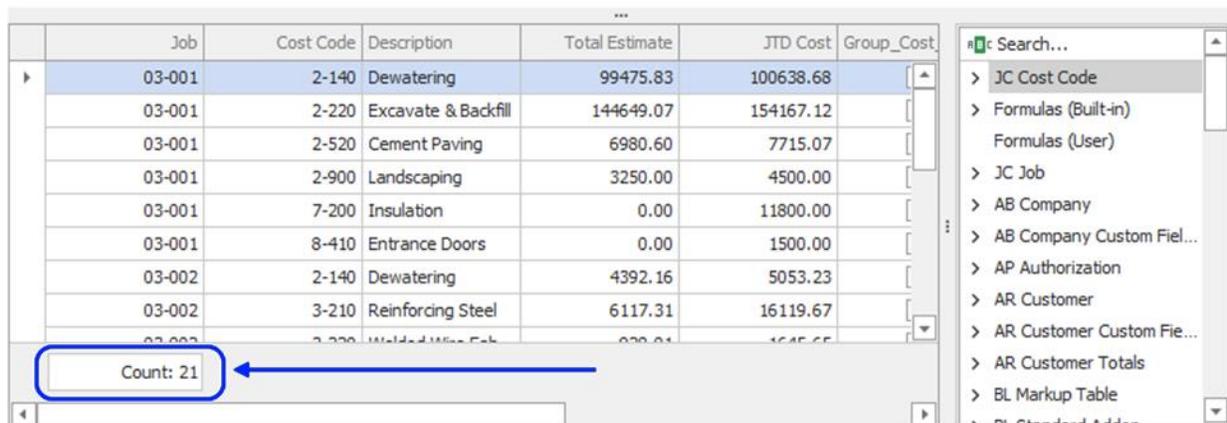
- File Name:** A text box containing 'Overhead Costs' and a button 'Use Sage value in name...'
- File type:** A dropdown menu showing 'MS Excel Workbook'.
- Protect PDF with password:** A checkbox that is unchecked, followed by a text box and a button 'Use Sage value for password...'
- Confirm password:** A text box and a checkbox 'Show characters'.
- Save Excel Attachments:** A section header followed by:
 - A checkbox 'Save file attachment:' with an information icon and a button 'Use Sage value in folder name...'
 - A checkbox 'Send a combined spreadsheet for all Sage data folders' which is circled in blue and has a blue arrow pointing to it.

At the bottom right are 'Ok' and 'Cancel' buttons.

If the checkbox is checked, the information from each Sage data folder the Task monitors will be combined into a single spreadsheet. If the checkbox is not checked, a separate spreadsheet will be sent for each Sage data folder.

Updated Condition Preview

MyAssistant 23.1 includes an updated Preview in the Condition step of Task Setup, featuring a count of how many items met the criteria. This helps confirm that the Condition on a Task is finding only the correct information.

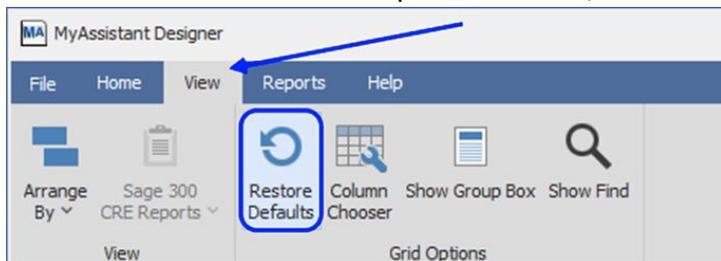


Job	Cost Code	Description	Total Estimate	JTD Cost	Group_Cost
03-001	2-140	Dewatering	99475.83	100638.68	
03-001	2-220	Excavate & Backfill	144649.07	154167.12	
03-001	2-520	Cement Paving	6980.60	7715.07	
03-001	2-900	Landscaping	3250.00	4500.00	
03-001	7-200	Insulation	0.00	11800.00	
03-001	8-410	Entrance Doors	0.00	1500.00	
03-002	2-140	Dewatering	4392.16	5053.23	
03-002	3-210	Reinforcing Steel	6117.31	16119.67	

Count: 21

Easily View Task Schedules

A common request is to have one place to see when all MyAssistant Tasks are scheduled to run. With MyAssistant 23.1, the main MyAssistant window includes a column of each Task's schedule by default. If upgrading from a previous version of MyAssistant, this can be seen by opening the software, clicking the "View" tab of the ribbon at the top of the window, then clicking "Restore Defaults":



This will reset the columns in the main Task list and add the "Schedule" column, which will show when all activated Tasks are scheduled to automatically run.

Expanded Help Resources

MyAssistant 23.1 features more than 15 new or updated Help topics that provide education on how to use MyAssistant, as well as answer questions & resolve issues clients may have.

New & Updated Topics include:

- Send a Spreadsheet Overview
- Send Reports & Documents Overview
- Spreadsheet Templates
- Saving Copies of Spreadsheets
- Saving Copies of Emailed Attachments
- Attached Reports
- Glossary
- Troubleshooting Reports

... and more.

MyAssistant 23.1 also features a new Index and an improved Search in Help, as well as an updated User Guide. All these changes enable users to quickly find the correct information based on their needs.

New Ways to Search for Sage Information

The new, English-like Task Conditions introduced in MyAssistant 22.1 have been enhanced in version 23.1. Updates include adding new ways to search for information, like checking for dates in Sage that match yesterday's date. Other updates include changing how searching for a date that's in the next month or last month will update as the current date changes.

Reminders When Upgrading MyAssistant

When upgrading to MyAssistant 23.1 from a prior version, reminders will appear if components used to run Tasks and send emails (i.e. Windows Services) need to be updated after the upgrade is completed. These reminders will only appear in situations where the components need to be updated.

Auto-Upgrade Existing “Tasks”

If upgrading to MyAssistant 23.1 from a prior version, all activated Tasks from the prior version will be automatically upgraded. This ensures all Tasks that were running prior to the upgrade will continue to work as designed.

Additional Software Updates

- Compatible with Sage 300 CRE version 20.5 and later, meaning Sage does not need to be upgraded to use MyAssistant 23.1
- Resolved issue where Sage fields removed from a Spreadsheet Template were still being included
- Added and updated various tooltips
- Fixed situation where new Sage folders added on the MyAssistant Server couldn't be added to a MyAssistant workstation
- Updated MyAssistant install files to ensure the correct program is run to install the software
- Resolved issue with some MyAssistant Formulas finding the wrong result types (e.g. looking for dates instead of numbers or text)
- Fixed issue where users had to click out of a field in the Condition to save the value

Sage MyAssistant version 22.1

Release Highlights

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

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

MyAssistant 22.1 Enhancements

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

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

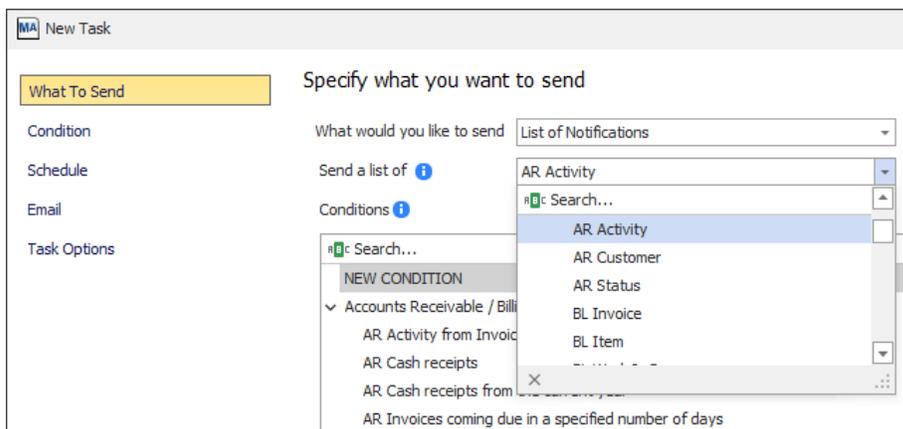
Simplified “Task” Setup

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

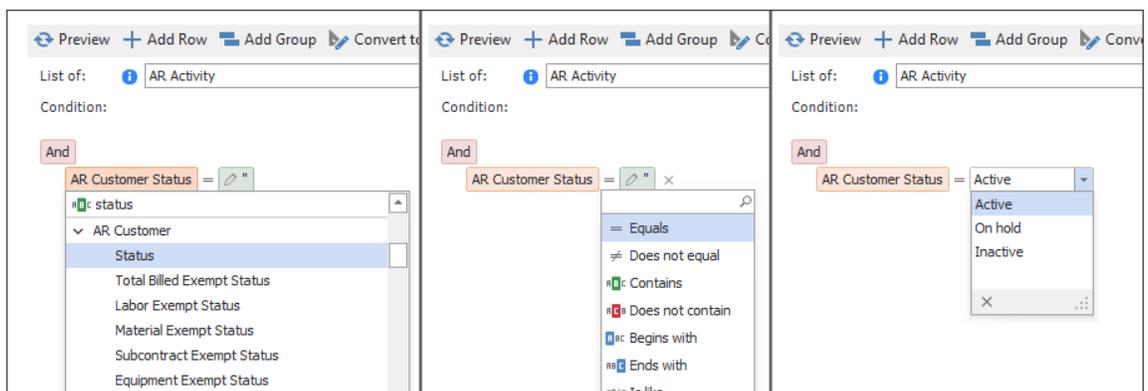
Sending a List of Notifications or Alerts

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

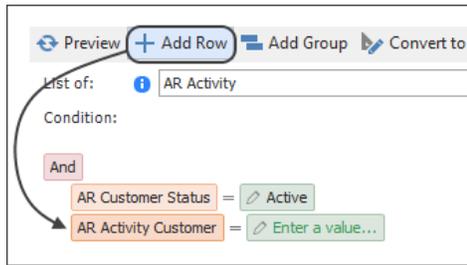
1. Start by opening a new Task, then picking what you want to send: Select **“List of Notifications”**, then choose what you want to send a list of:



2. Select a pre-built “Condition” that creates a list given specified criteria, or choose to create a “New Condition”
3. Create or customize the Condition’s with new, English-like statements. For example,
 - a. Change the first row by selecting a Sage field (e.g. *AR Customer Status*), an operand (*equals*) and a value to test against.

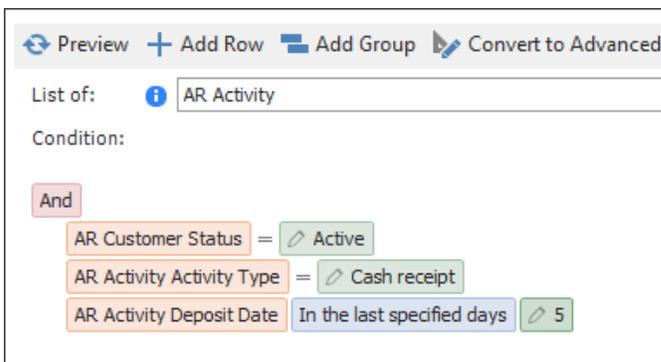


- b. Add lines to the Condition with the “Add Row” button

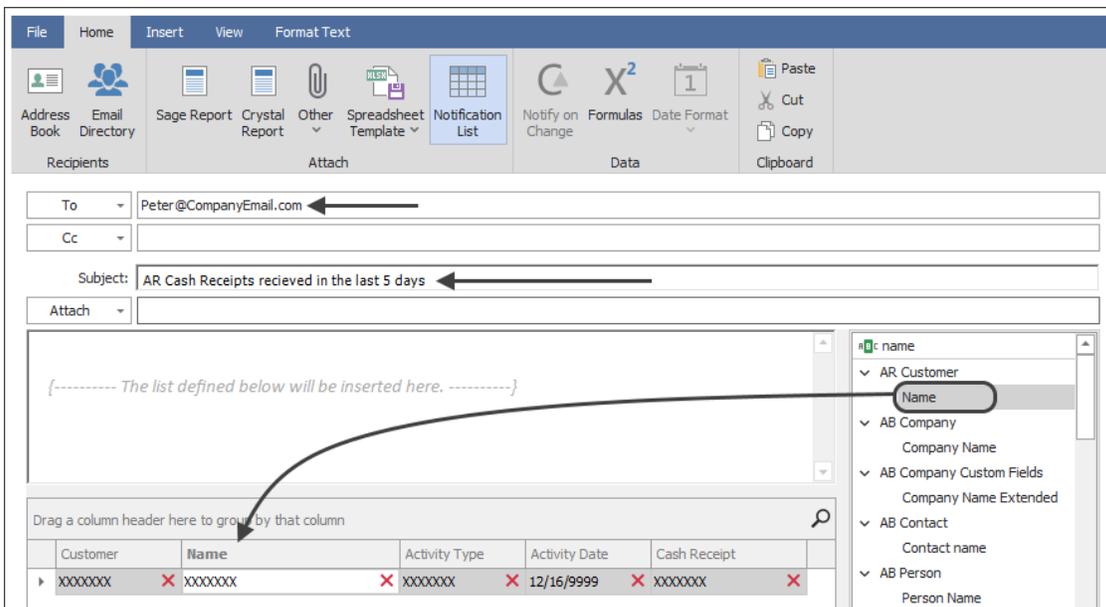


- c. Edit additional rows to dial in exactly what you want
- d. Click “Preview” to confirm the information the Condition found is what you want

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



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

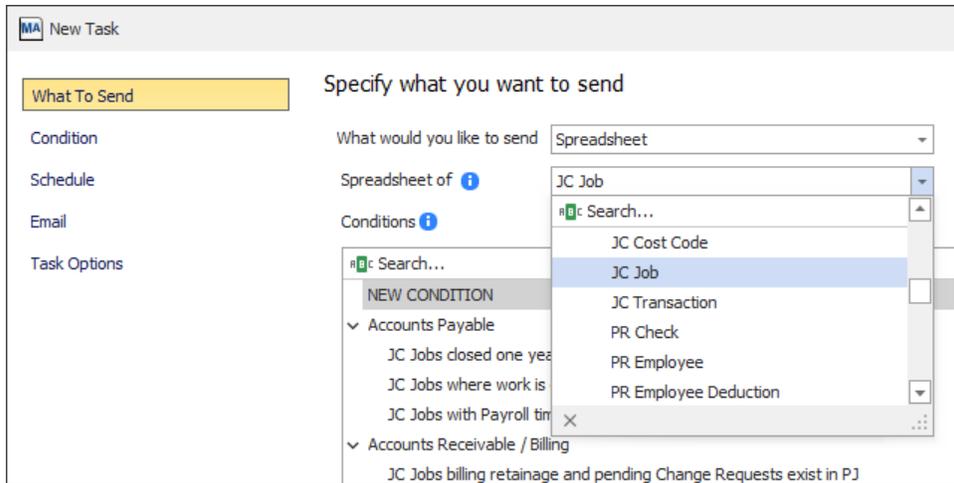


6. Finish Task Setup and send the email(s)

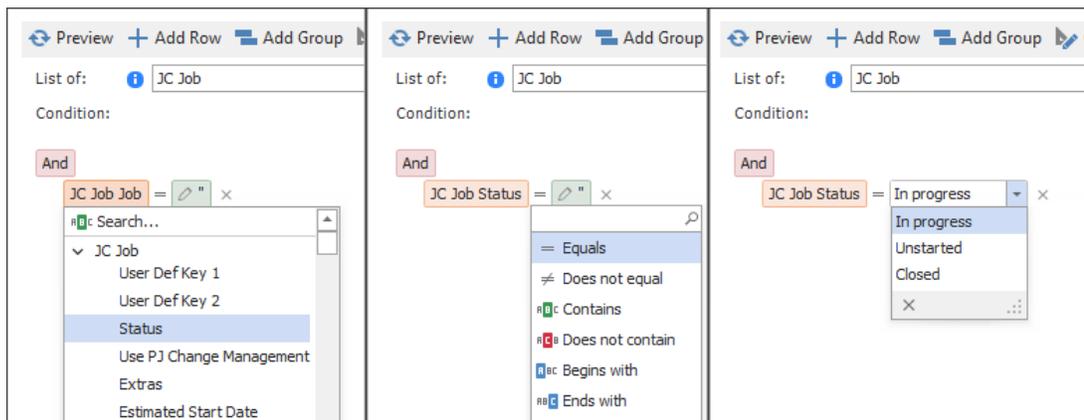
Sending a Spreadsheet

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

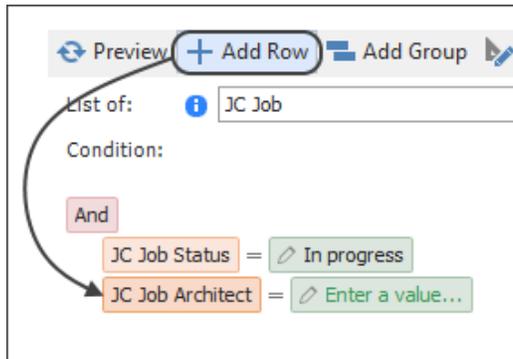
1. Start by opening a new Task, then picking what you want to send: Select "**Spreadsheet**", then choose what you want to send a Spreadsheet of:



2. Select a pre-built "Condition" that creates a spreadsheet given specified criteria, or choose to create a "New Condition"
3. Create or customize the Condition's with new, English-like statements. For example,
 - a. Change the first row by selecting a Sage field (e.g. *JC Job Status*), an operand (*equals*) and a value to test against.



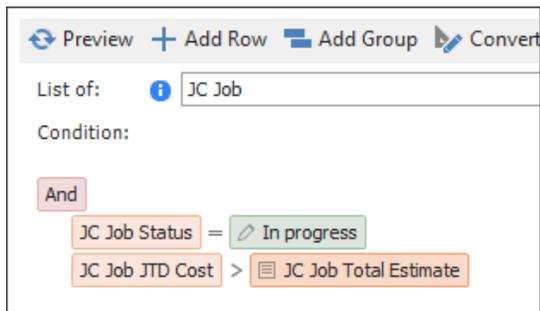
- b. Add lines to the Condition with the “Add Row” button



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

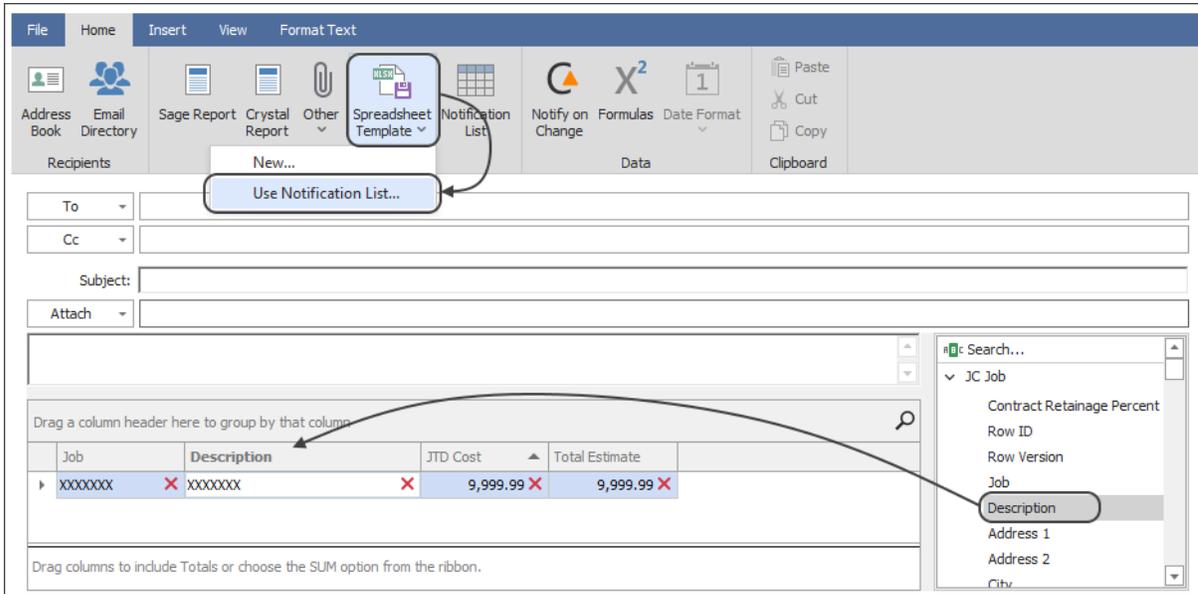
- d. Click “Preview” to confirm the information the Condition found is what you want

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



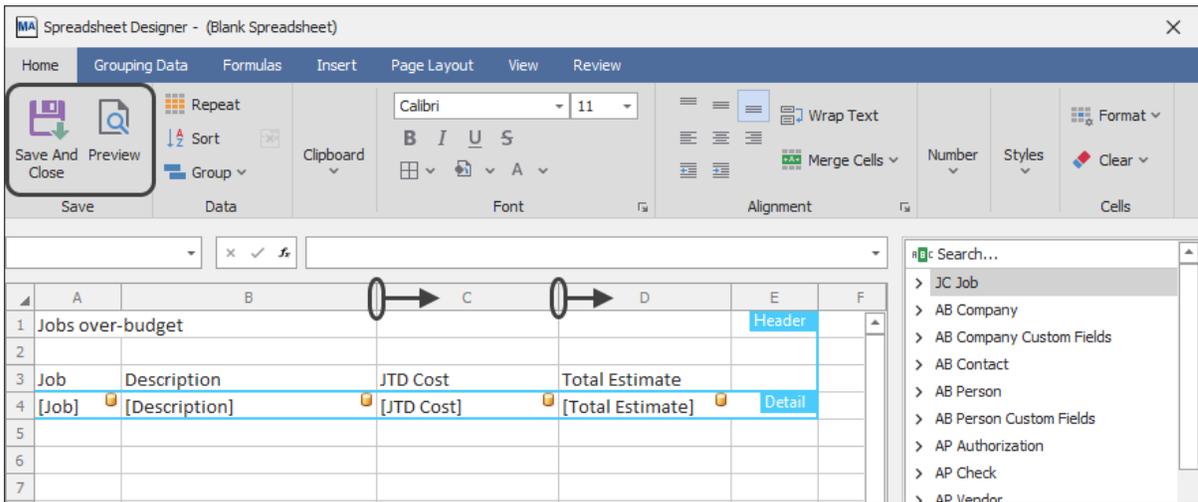
4. Schedule when the Task should automatically run.

- In the Email step: Click & drag the Sage information you want in your spreadsheet from the list on the right to the bottom-middle section. Arrange in the order you want, then click the “Spreadsheet Template” button in the ribbon and select “Use Notification List”:



This will automatically create a spreadsheet template (what MyAssistant will use to build the spreadsheet)

- Adjust the column widths in the new window that opens, preview the spreadsheet to confirm you’re getting what you want, then click “Save & Close” in the ribbon:

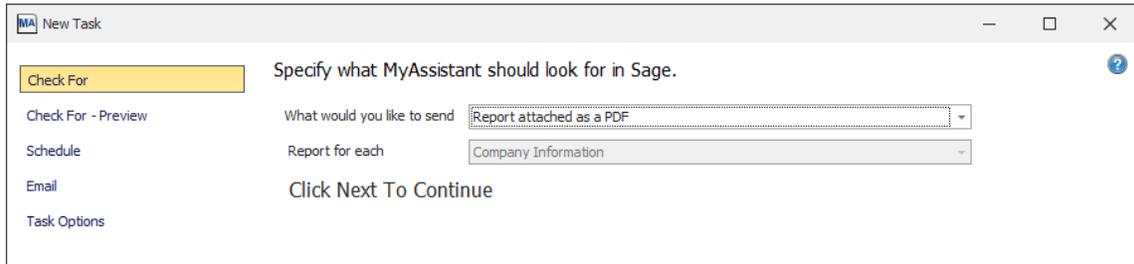


- Add recipients and a Subject, then complete Task Setup.

Sending Reports

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

1. Open a new Task and select **“Report attached as a PDF”**:



MA New Task

Check For Specify what MyAssistant should look for in Sage.

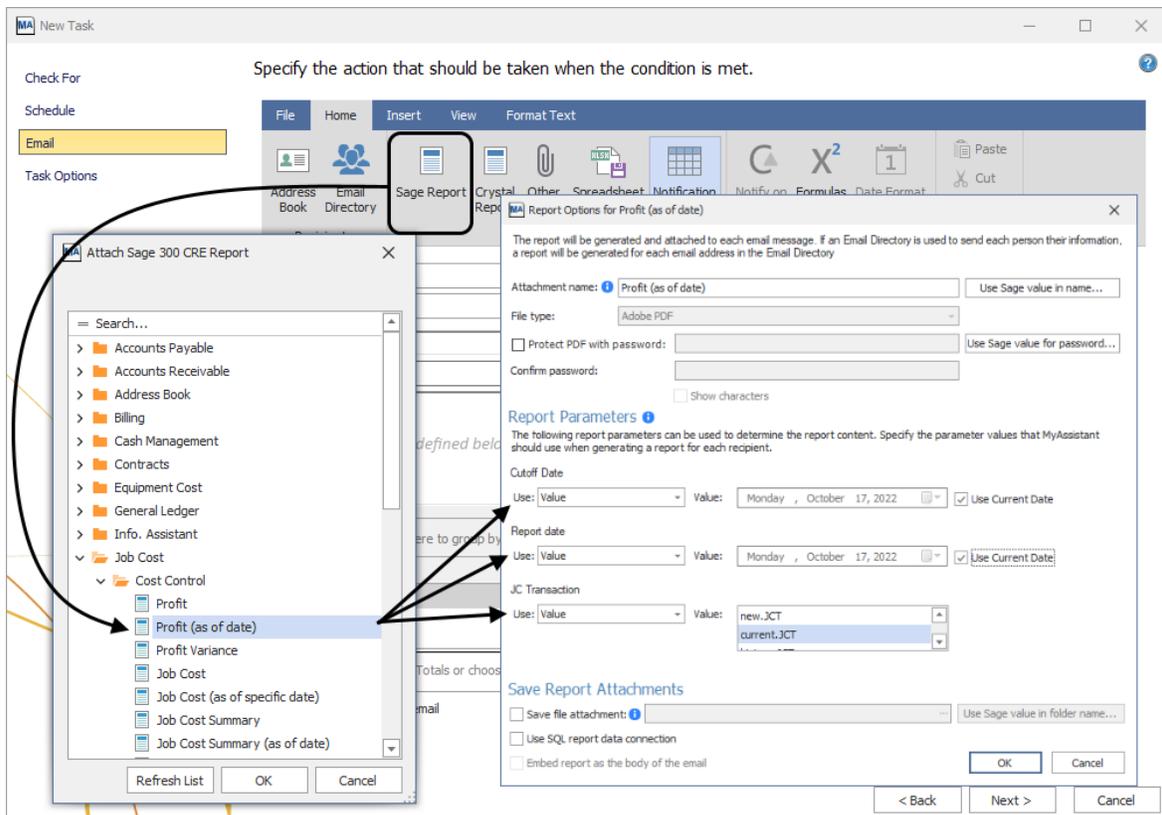
Check For - Preview What would you like to send Report attached as a PDF

Schedule Report for each Company Information

Email Click Next To Continue

Task Options

2. Schedule when the Task should automatically run.
3. In the Email Step: Click the **“Sage Report”** button and select your report from the window that opens
4. Fill out any report prompts in the Window that opens, then click OK



MA New Task

Check For Specify the action that should be taken when the condition is met.

Schedule

Email

Task Options

File Home Insert View Format Text

Address Book Email Directory Sage Report

Crystal Reports Other Spreadsheet Notification

Report Options for Profit (as of date)

The report will be generated and attached to each email message. If an Email Directory is used to send each person their information, a report will be generated for each email address in the Email Directory

Attachment name: Profit (as of date) Use Sage value in name...

File type: Adobe PDF

Protect PDF with password: Use Sage value for password...

Confirm password:

Show characters

Report Parameters

The following report parameters can be used to determine the report content. Specify the parameter values that MyAssistant should use when generating a report for each recipient.

Cutoff Date

Use: Value Value: Monday, October 17, 2022 Use Current Date

Report date

Use: Value Value: Monday, October 17, 2022 Use Current Date

JC Transaction

Use: Value Value: new.JCT

current.JCT

Save Report Attachments

Save file attachment: Use Sage value in folder name...

Use SQL report data connection

Embed report as the body of the email

OK Cancel

< Back Next > Cancel

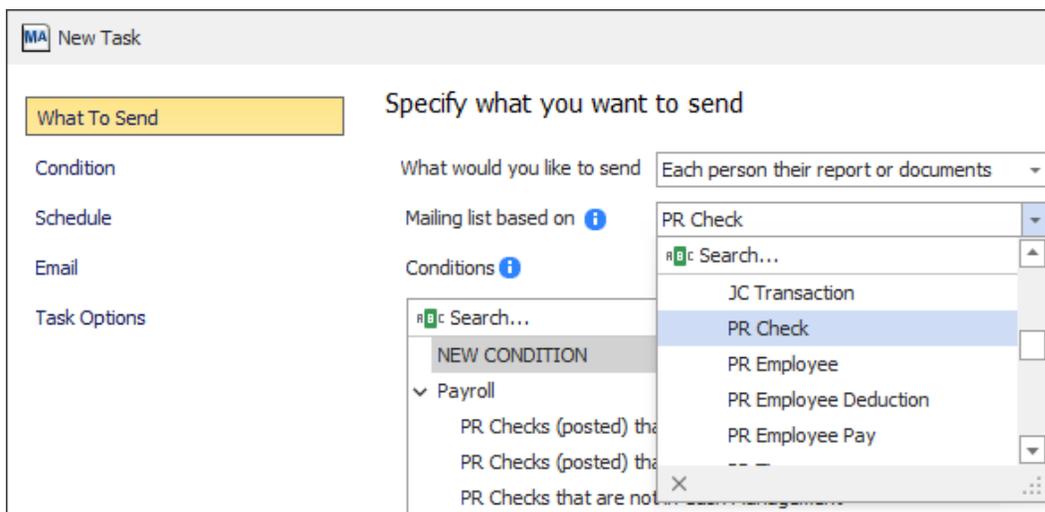
5. Add recipients & a Subject, then finish Task Setup

Sending Each Person Reports or Documents with Just their Information

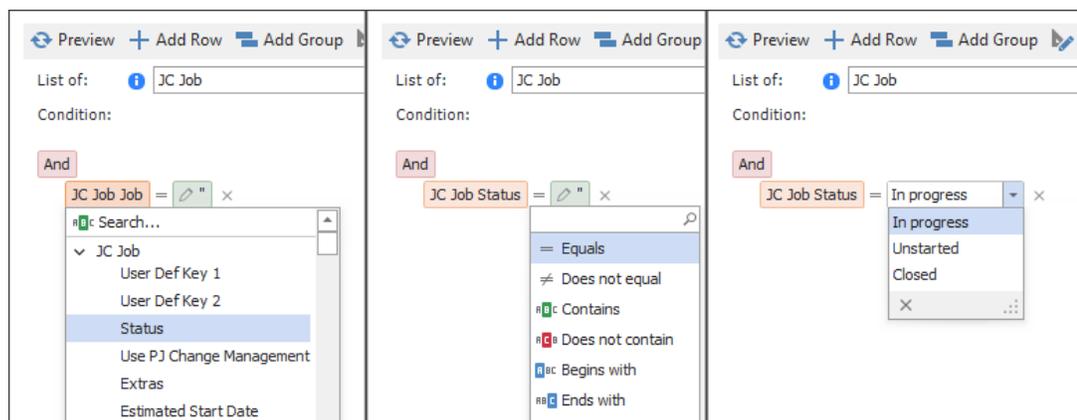
Many companies use MyAssistant to send people their reports or documents with only their information. Common examples include sending Employee pay statements, Customer statements, or electronic payment notifications to Vendors.

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

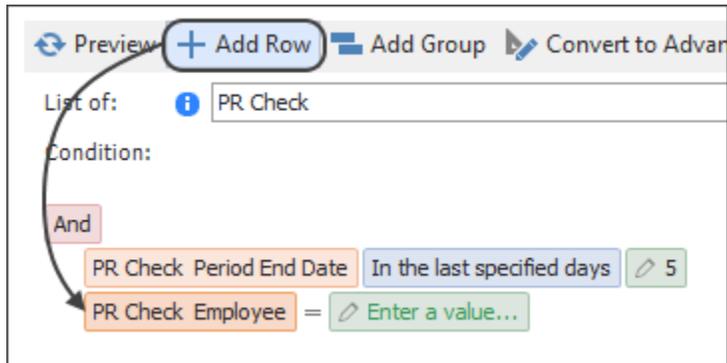
1. Open a new Task, then choose what you want to send: Select "**Each person their reports or documents**", then choose the Sage information to use for deciding who does & doesn't get an email (i.e. a "mailing list"):



2. Select a pre-built "Condition" that creates a list given specified criteria, or choose to create a "New Condition"
3. Create or customize the Condition's with new, English-like statements. For example,
 - a. Change the first row by selecting a Sage field (e.g. *PR Check Period End Date*), an operand (*in the last specified days*) and a value to test against.



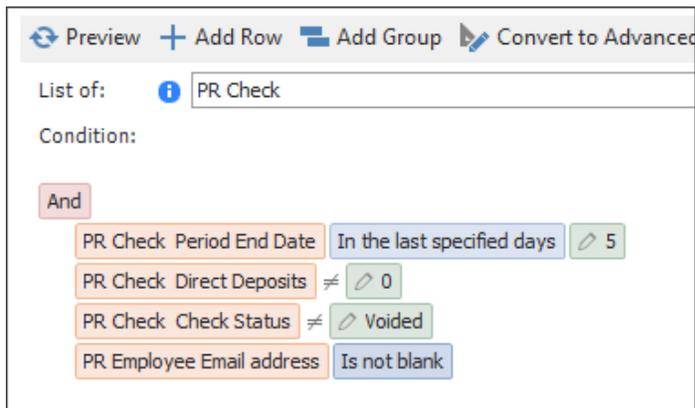
- b. Add lines to the Condition with the “Add Row” button



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

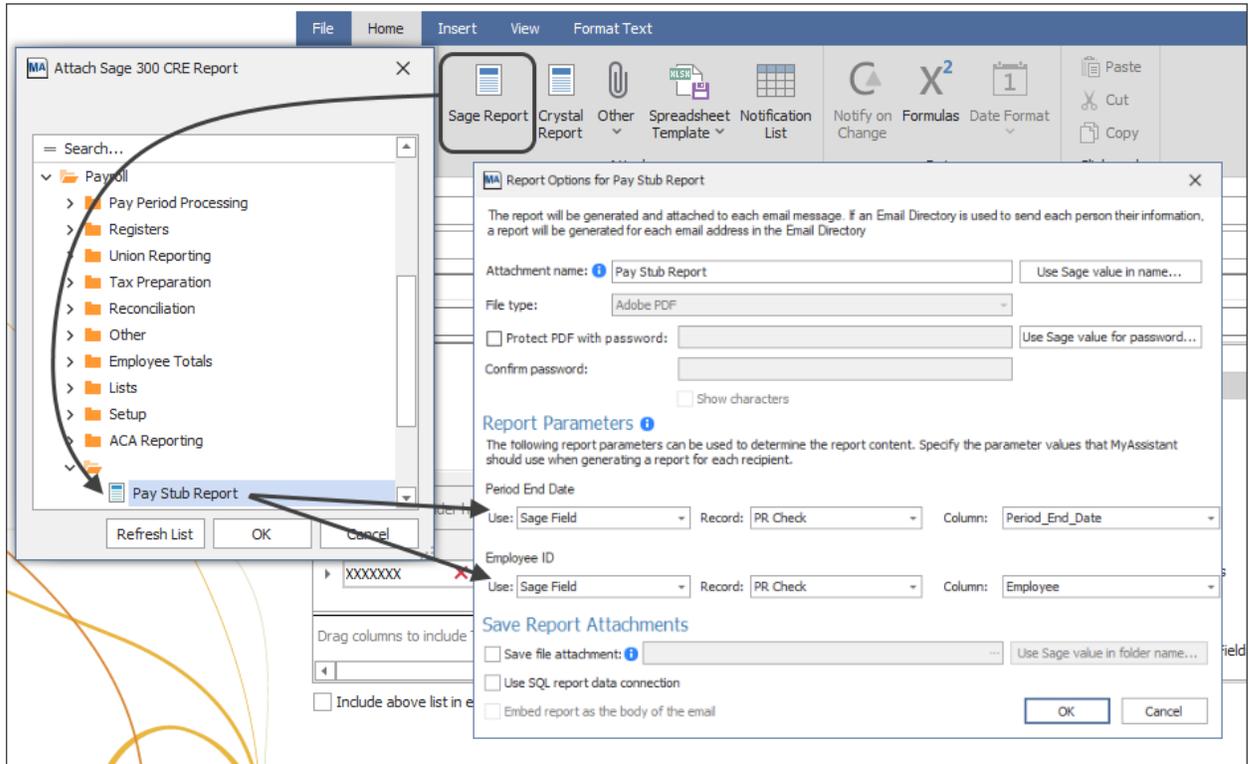
- d. Click “Preview” to confirm the information the Condition found is what you want

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

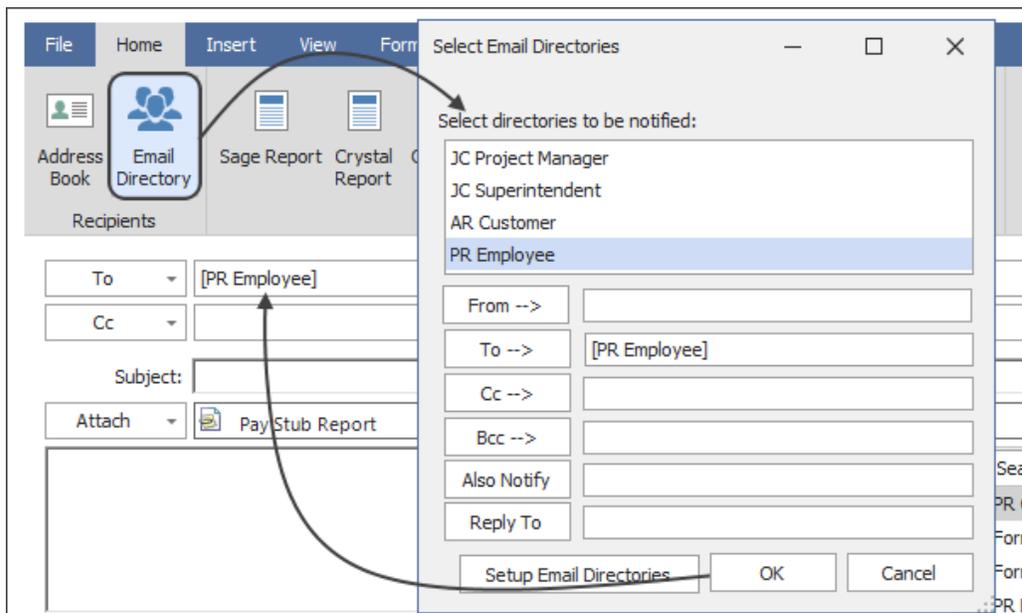


4. Schedule when the Task should automatically run.
5. In the Email step: click “Sage Report” or “Crystal Report” and select the report that includes the prompts needed to filter the content by recipient (e.g. prompt for Project Manager on Cost Reports, Employee ID on pay statements, or Customer ID prompt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

6. Update the prompts in the window that opens to use values from Sage fields to filter the content of the report:



7. Click "Email Directory" in the ribbon and select the Email Directory that will look up an email address for each item found by the Condition



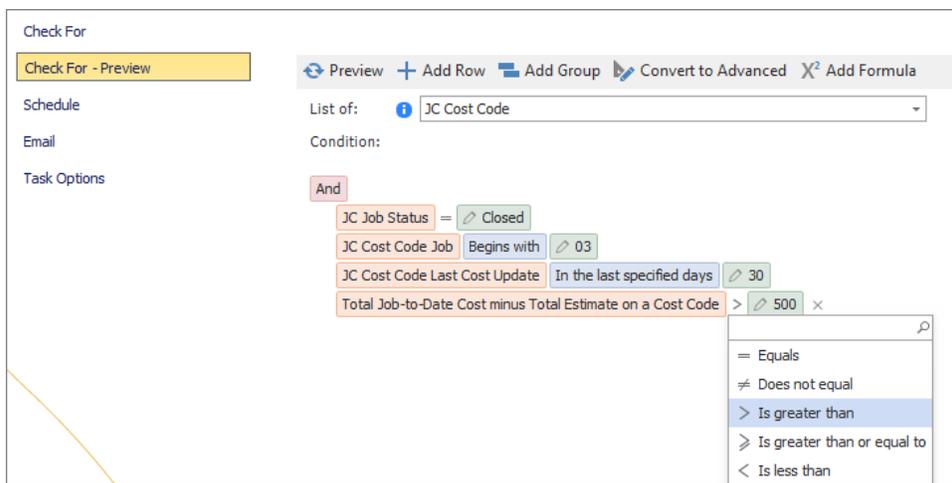
8. Finish Task Setup & send emails

Find Information in Sage with New, English-Like Conditions

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

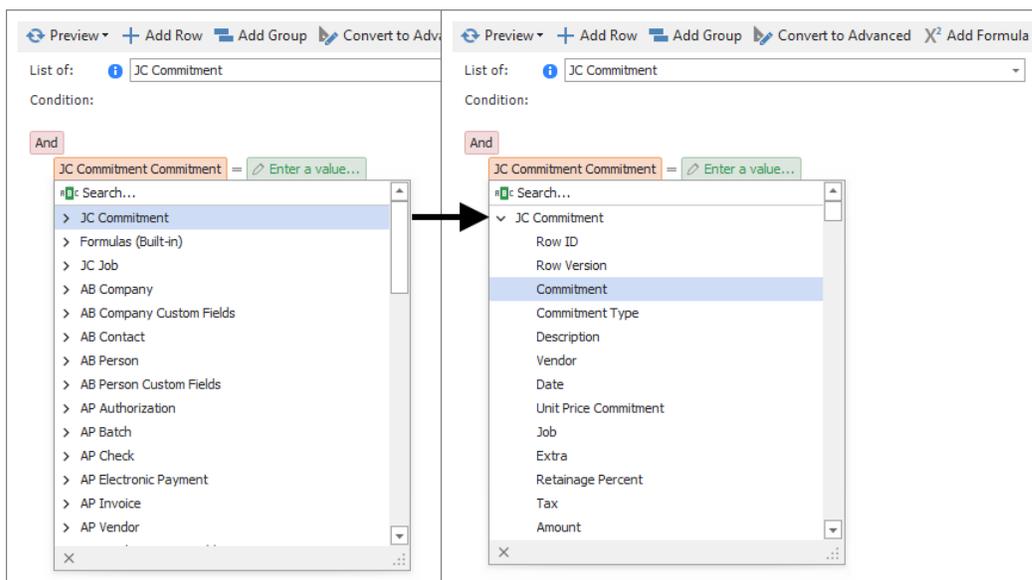
- Checking for a date “in the last specified days” or “in the next 30 days”
- Selecting Jobs numbers that “Begin with”, “End with” or “Contains” certain characters
- Checking for amounts over a specified number in a range of numbers
- Looking up Sage information like sums, counts or calculations using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

Creating Conditions now consists of adding and changing rows of easy-to-understand text.

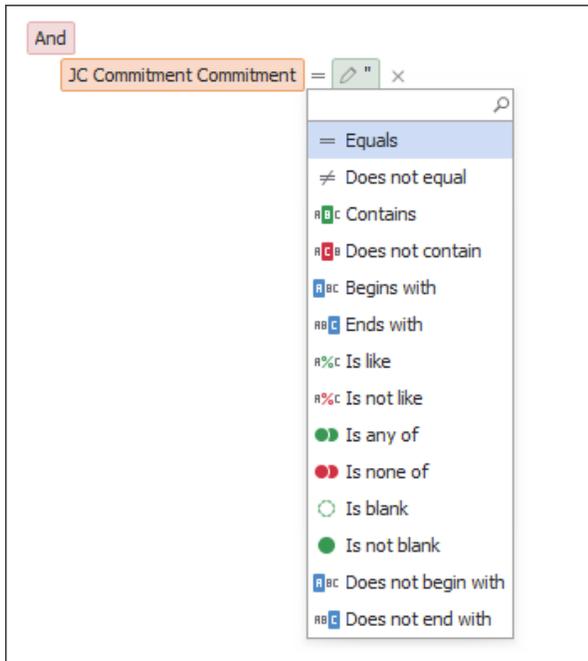


This could include:

Selecting/changing the Sage field you want to check:



Choosing the operand for what you want to do:



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

Text Operands
= Equals
≠ Does not equal
⊃ Contains
⊄ Does not contain
⊃ Begins with
⊄ Ends with
⊃ Is like
⊄ Is not like
● Is any of
● Is none of
○ Is blank
● Is not blank
⊄ Does not begin with
⊄ Does not end with

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

Date Operands		
Is today	Is blank	Is next month
Is before today	Is not blank	Is next year
Is after today	Is in date range	Is last month
In the next specified days	Is not in date range	Is last year
In the last specified days	Is later this year	Is the year-to-date period
Is more than specified days in the future	Is in the next 30 days	Is January
Is more than specified days ago	Is in the next week	Is February
In the last specified days or newer	Is in this year	Is March
In the next specified days or older	Is in this month	Is April
Is between	Is in the last week	Is May
Is beyond this year	Is in the last 30 days	Is June
= Equals	Is earlier this year	Is July
≠ Does not equal	Is prior to this year	Is August
> Is greater than	Is same day	Is September
≥ Is greater than or equal to	Is this month	Is October
< Is less than	Is this week	Is November
≤ Is less than or equal to	Is this year	Is December

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

The screenshot displays a condition builder interface. On the left, a dropdown menu is set to 'JC Commitment'. Below it, a condition is shown: 'JC Commitment Commitment = Enter a value...'. An arrow points from this field to a search box on the right. The search box is open, showing a list of results under the heading 'JC Job'. The results include 'Formulas (Built-in)', 'AB Company', 'AB Contact', 'AB Person', and 'AP Authorization'. The search term 'JC Job Estimated Comp Date' is visible in the search box.

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

Preview + Add Row + Add Group + Convert to Advanced + Add Formula

List of: JC Cost Code

Condition:

And

- JC Job Status = Closed
- JC Cost Code Job Begins with 03
- JC Cost Code Last Cost Update In the last specified days 30
- Total Job-to-Date Cost minus Total Estimate on a Cost Code > 500

Job	Cost_Code	Status	Description	Last_Cost_Update	Total_Job-to-Dat.
03-001	2-000	In progress	SITEWORK	5/15/2015	1223
03-001	2-140	In progress	Dewatering	3/26/2015	116
03-001	2-220	In progress	Excavate & Backfill	4/7/2015	951
03-001	2-520	In progress	Cement Paving	5/15/2015	73
03-001	2-900	In progress	Landscaping	4/5/2015	125
03-001	7-200	In progress	Insulation	5/1/2015	1180
03-001	8-410	In progress	Entrance Doors	5/10/2015	150
03-002	2-140	In progress	Dewatering	3/26/2015	66
03-002	3-210	In progress	Reinforcing Steel	4/19/2015	1000
03-002	3-220	In progress	Welded Wire Fabric	4/19/2015	71

Search... JC Cost Code

- Job
- Extra
- Cost Code
- Description
- Group Cost Code
- Status
- Estimated Start ...
- Estimated Comp...
- Revised Start D...
- Revised Comp ...
- Actual Start Date

Preconfigured Conditions converted to English-like setup

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

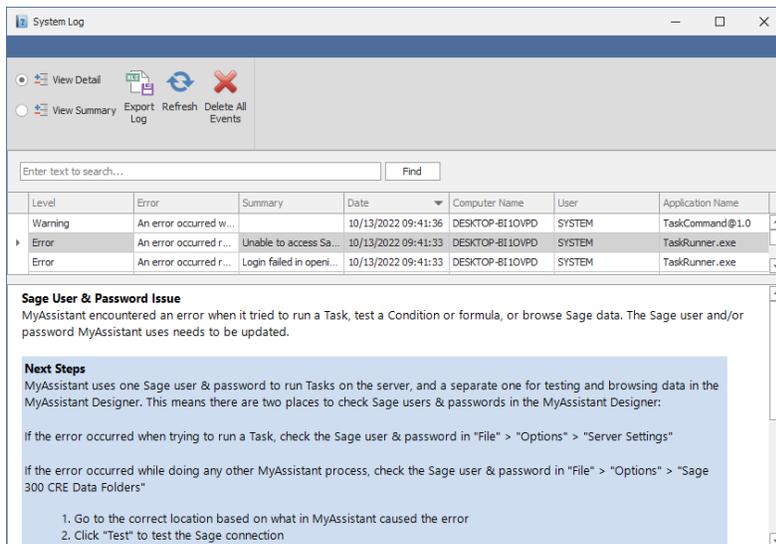
Save Emailed Spreadsheets to “Smart” Folders

Just like with reports attached to Tasks, Sage customers asked to save copies of spreadsheets they send with MyAssistant. In MyAssistant 22.1, emailed spreadsheets can be saved to a specified folder.

MyAssistant can also automatically save using “smart” folders that are based on values in Sage (e.g. Customer, Vendor, Job, or Project Manager Name). For example: you could send each Project Manager a weekly cost spreadsheet for each of their Jobs, then have MyAssistant automatically create a folder named after the Project Manager with a copy of each spreadsheet.

New System Log

MyAssistant 22.1 features a System Log in the MyAssistant Designer that identifies and explains (in non-technical terms) what happened if an error occurs:



This helps you solve common issues yourself with step-by-step instructions. If someone else needs to review the log, you can also export a copy to Excel.

New Help, additional resources, tooltips and information icons

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

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

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

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

General Software Improvements

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