

Sage MyAssistant Version 23.1

# User Guide

Sage

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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:

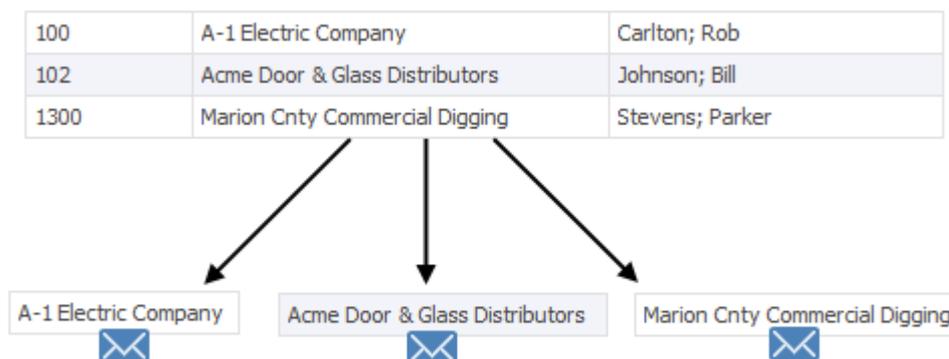
1. A Task runs (either by a Schedule or being manually triggered by a user)
2. MyAssistant looks up specific information in Sage that meets the criteria specified in the Task's [Condition](#).

**Example:** A Task can look for Vendors with Expiring insurance

100	A-1 Electric Company	Carlton; Rob					
1000	Jackson Heating & A/C	Brown; Pete					
101	Alpha Insulation	Elliott; Collin					
102	Acme Door & Glass Distributors	Johnson; Bill	→	100	A-1 Electric Company	Carlton; Rob	
103	Ace Drywall	Ryan; Paul		→	102	Acme Door & Glass Distributors	Johnson; Bill
1101	Kingston Plumbing	Turner; Laura		→	1300	Marion Cnty Commercial Digging	Stevens; Parker
1300	Marion Cnty Commercial Digging	Stevens; Parker					
1800	Rocky Slate Company	Miller; Rocky					

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

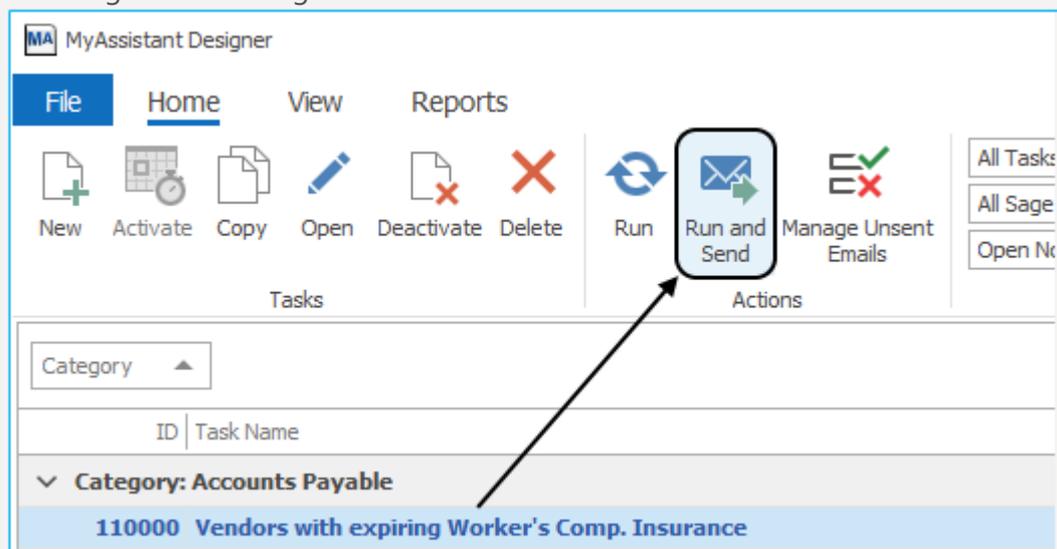
- Spreadsheets are created if a MyAssistant Spreadsheet Template is attached
- Any reports from Sage menus are generated
- Documents, spreadsheets and/or text files are created from any attached Crystal Reports

**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"



# 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 each company's specific needs. This section steps through searching, activating and customizing prebuilt Tasks in order to review what can be sent.

## Determining What to Automate

When thinking of ways to use Sage MyAssistant, start by building a list of things that you'd like to send yourself or others.

To help, ask 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?

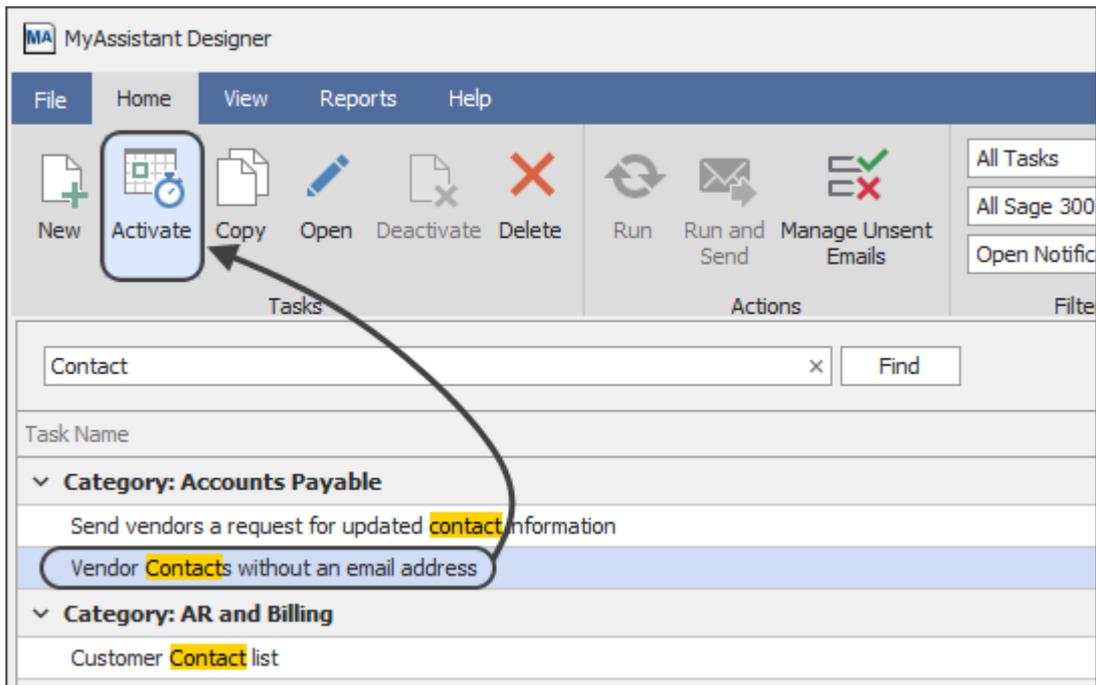
Next, review the "MyAssistant Prebuilt Task List" to find Tasks that you'd like to try out and see what you can receive.

## Setting up MyAssistant Tasks

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

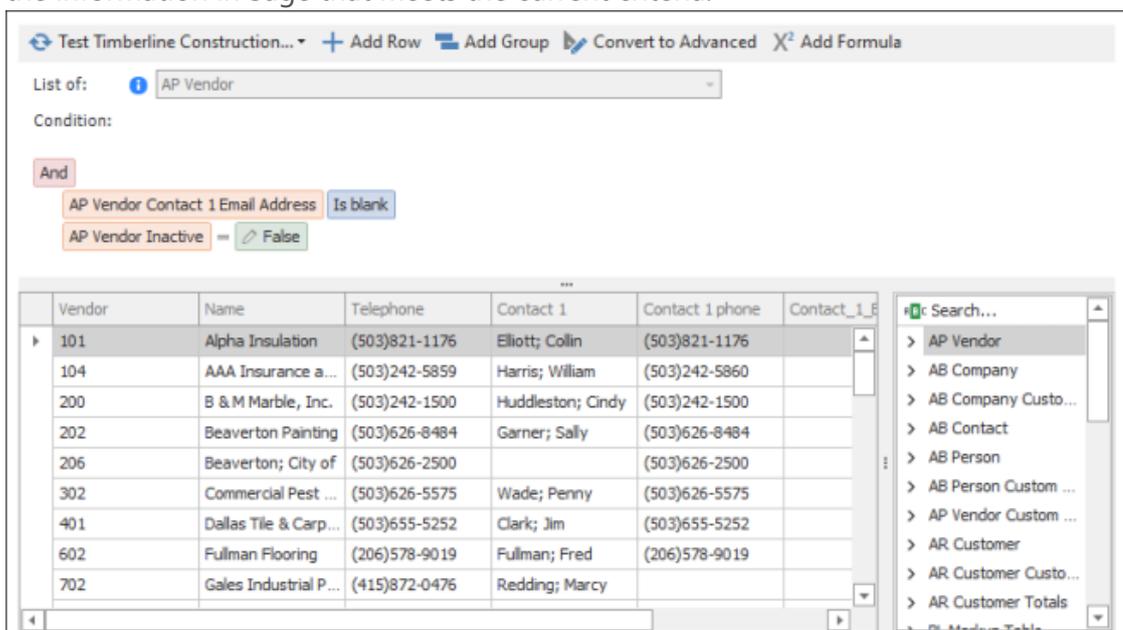
1. **Use Search:** Quickly look through MyAssistant's 300+ prebuilt Tasks by clicking in the Search bar in the main MyAssistant window and typing a key word or phrase. This will filter the list of prebuilt Tasks to only those whose names include what was searched.

2. **Select a Task to try out:** Click a Task that sounds like it may provide the right information from the list under the search bar, then click the "Activate" button in the ribbon



This will open the Task Setup window, starting in the "Condition" step.

3. **Review information that is found:** Make sure the Task is looking up the desired information by clicking the "Preview" button in the "Condition" step. This will show all the information in Sage that meets the current criteria.



Click "Next" in the bottom right to advance to the next step of Task Setup

4. **(Optional) Choose a Sage data folder:** If MyAssistant is set up to monitor multiple Sage data folders, choose at least one data folder that the Task will look up information for and send emails. Click "Next" when done to advance to the Schedule step of Task Setup

**Note:** If MyAssistant is monitoring only one Sage data folder, this step will not appear.

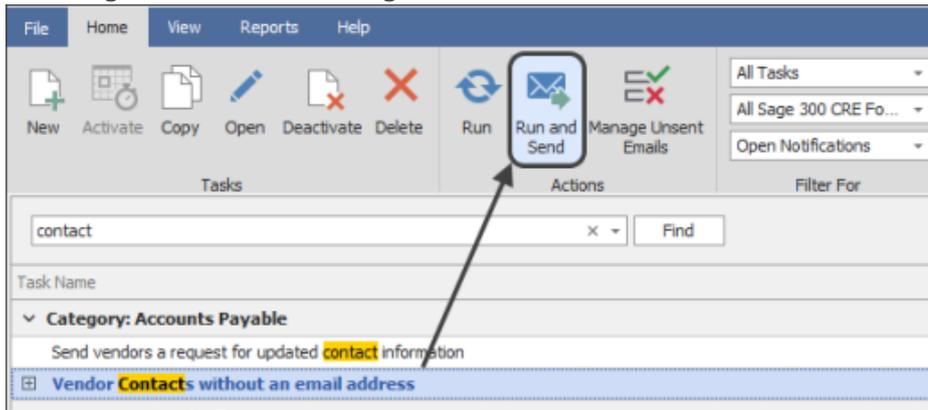
5. **Skip the Schedule step:** Accept the default setting of the Task only running "On demand" (i.e. it will only run when manually triggered) and click "Next" in the bottom-right. Schedules can be added to a Task later.
6. **Enter your email address:** In the Email step, ensure you're the only recipient on the Task by clicking in and removing anything in the "To" line, then typing in your email address. Recipients can be changed on a Task at a later time.

To	MyEmailAddress@MyCompany.com
Cc	
Subject:	AP Vendor Contact without an email address

Click "Next" to advance to the last step of Task Setup.

7. **Accept the default Options:** Leave all the settings alone on the last step of Task Setup (the "Options" step) and click "Finish" to close Task Setup
8. **Run the Task:** After finishing Task Setup, send an email by clicking "Yes" when asked if the Task should be run and emails should be sent
9. **Identify any desired changes:** Open and review the email received to determine what changes (if any) should be made to the MyAssistant Task
10. **Open the Task for edits:** Reopen MyAssistant, select the Task from the list (Task name should now be bold and blue), and click the "Open" button in the ribbon in order to make changes to the Task.
11. **Change the email's content:** Click "Email" on the left side of the window that opens to go back to the Email step. This step controls what recipients are sent, and is where to make changes like:
  - [Adding or remove columns from the list sent in the body of the email](#)
  - [Turn the emailed list into an attached spreadsheet](#)
  - [Attach a report to the email](#)

12. **Save changes and re-send the email:** After updating what the Task will send, click "OK" in the bottom-right of the window to save changes. Then, send a new email by selecting the Task and clicking "Run and Send":



## Send a List of Notifications Overview

MyAssistant can send a list of items someone needs to look at (i.e. "Notifications"). Examples include Vendors with expiring insurance, Job costs posted to a closed Job, and missing Employee contact information.

This outlines the steps to create a [Task](#) to send a list of Notifications (with links to more detailed steps):

1. **Create a new Task:** Click the "New" button in the main MyAssistant window to create a new Task
2. **Pick what to send a list of:** Choose to send a list in the "What to Send" step, then pick [what you want to send a list of](#) (for example: a list of Jobs) in the body of the email. [Click here](#) for a table that helps identify what record information is stored in based on where it's viewed or entered in Sage.
3. **Choose which items to send:** Use a prebuilt or create a new [Condition](#) (for example: JC Jobs not billed in a specified number of days, AP Invoices not fully paid, PR Employees missing an email address, etc.) in the "What to Send" step to filter the list that's emailed to recipients.
4. **Set criteria of which items to send:** [Create or customize](#) the Condition (for example: all open Jobs where the JTD Cost is greater than the Total Estimate) in the "Condition" step to ensure the MyAssistant is looking for only the items that should be in the list
5. **Schedule when the list is sent:** [Schedule](#) how often the Task should automatically run and see if a list needs to be sent.

6. **Create the list:** [Select the emailed list's columns](#) by adding Sage fields to the table at the bottom of the "Email" step.
7. **Choose who to email:** Specify the [recipients](#) that should be emailed when a list needs to be sent. An [Email Directory](#) can be used to send each recipient a list of only their items (for example: send each Project Manager only their Jobs).
8. **Finish setting up the Task:** Confirm the last settings in the "[Options](#)" step and finish Task Setup

## Send a Spreadsheet Overview

Information in Sage can be sent in a spreadsheet with 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.

The following takes place when running a Task that sends a spreadsheet.

1. The Task [Condition](#) criteria determines if a spreadsheet should be sent, and what information is in it. For example:
  - a. Do any Vendors have missing or expired insurance?
  - b. Are any Cost Codes over-budget ?
  - c. Are there any AR Invoices that are past due?
    - i. [Click here](#) for a table that helps identify what record information is stored in based on where it's viewed or entered in Sage.
2. The Spreadsheet Template is used to create a spreadsheet that's attached to the email.
  - a. If an [Email Directory](#) is specified in the Email Step of Task Setup, MyAssistant looks up an email address for each item found by the Condition, creates a separate email and filters the spreadsheet for each recipient. For example: An Email Directory can look up the Project Manager's email address on a Job that has over-budget Cost Codes.

This outlines the steps to create a [Task](#) to send a Spreadsheet (with links to more detailed steps):

1. **Create a new Task:** Click the "New" button in the main MyAssistant window to create a new Task
2. **Choose what to send a spreadsheet of:** Choose to send a spreadsheet in the "What to Send" step, then pick [what to send in the spreadsheet](#) (for example: a spreadsheet of AP Invoices) attached to an email

3. **Pick which items to send:** Choose a prebuilt or create a new [Condition](#) (for example: AP Invoices not fully paid, JC Jobs not billed in a specified number of days, PR Employees missing an email address, etc.) in the "What to Send" step to filter the list that's used as part of creating the spreadsheet.
4. **Set criteria for which items to send:** [Create or customize](#) the Condition (for example: AP Invoices not fully paid with an invoice date more than 30 days ago) in the "Condition" step to ensure MyAssistant is looking for the right information to include in the spreadsheet.
5. **Schedule when spreadsheets are sent:** [Schedule](#) how often the Task should automatically run and see if a spreadsheet needs to be sent
6. **Create the spreadsheet:** Choose what information is in the spreadsheet by [selecting the Sage fields](#) in the Notification Table in the "Email" Step, then create a spreadsheet template based on the table.
7. **Choose who to email:** Specify the [recipients](#) that should be emailed when spreadsheets need to be sent. An [Email Directory](#) can be used to send each recipient a spreadsheet of only their items (for example: send each Project Manager only their Jobs).
9. **Finish setting up the Task:** Confirm the last settings in the "[Options](#)" step and finish Task Setup

# Send Reports & Documents Overview

MyAssistant can automatically generate and send reports and documents; including filtering the content for each recipient. Examples include sending employees their pay stubs, customers their statements, and cost reports to project managers for their jobs.

The following takes place when running a Task that sends reports or documents:

1. The Task [Condition](#) determines if one or more reports / documents should be generated and sent based on its criteria. For example:
  - a. Which employees were paid last week and need to receive a pay stub?
  - b. Which vendors are out of compliance and need to receive a notice?
    - i. [Click here](#) for a table that helps identify what record information is stored in based on where it's viewed or entered in Sage.
2. When reports need to be sent to multiple people, the condition creates a mailing list (For example: A list of PR checks that were generated last week). This list is used along with an [Email Directory](#) to look up email addresses for each item (For example: Look up email addresses for each employee who received PR check).
3. MyAssistant sorts the mailing list by email address and creates one email per recipient.
4. Before each email is sent, [attached reports](#) are run and filtered for the recipient using report prompts.
  - a. [Report prompts](#) filled in when running the report in Sage are used to filter the report content for each recipient. Settings in the Task Setup – Email step – Report Options window specify the information used to fill in each report prompt. For example: an "Employee" report prompt that filters the report to one person is filled in with the Employee ID from their PR Check record.
5. Emails are sent when the attached report(s) are completed.

## Steps to Send the Same Report Content for all Recipients

This outlines the steps to create a [Task](#) to send an attached report where everyone gets the same information (with links to more detailed steps):

1. **Create a new Task:** Click the "New" button in the main MyAssistant window to create a new Task
2. **Choose to send a report:** Choose to send "A report attached as a PDF" in the "[What to Send](#)" step
3. **Schedule when reports are sent:** Specify whether the report(s) should be sent automatically on a [Schedule](#) in the "Schedule" step
4. **Pick which report(s) to send:** [Choose which report\(s\)](#) should be emailed in the "Email" step and fill out any report prompts

5. **Specify who to email:** Specify the [recipients](#) that should be emailed the report(s) when the Task is ran
6. **Finish setting up the Task:** Confirm the last settings in the "[Options](#)" step and finish Task Setup

### Steps to Send Each Person Only Their Information

This outlines the steps to create a [Task](#) that sends each recipient reports & documents containing only their information:

1. **Confirm reports work and filter content properly:** Test the report(s) or document(s) that will be sent with MyAssistant in Sage or Crystal Reports to make sure they run, and that the prompts will filter the content for each recipient (For example: testing a "Pay stub" Crystal Report to make sure it filters for the prompted Employee and Period End Date).
2. **Create a new Task:** Click the "New" button in the main MyAssistant window to create a new Task
3. **Choose what to send:** Select to send "Each person their reports or documents" in the "What to Send" step, then pick [what Sage information to use to create a mailing list](#) that determines who is and isn't sent an email (for example: using PR checks to find out which employees were paid last week and need to be emailed).
4. **Pick which mailing list to use:** Choose a prebuilt or create a new [Condition](#) (for example: "PR checks (posted) that use Direct Deposit" to get a list of Employees paid in the last week) in the "What to Send" step to use as a mailing list.
5. **Define criteria for the mailing list:** [Create or customize](#) the Condition (for example: PR Checks that aren't voided, have Direct Deposit amounts, are from the most recent pay period, and are for employees with an email address) to ensure MyAssistant creates an accurate mailing list based on the desired information.
6. **Schedule when reports are sent:** [Schedule](#) how often the Task should automatically run and see if a reports or documents need to be sent
7. **Pick the report(s)/document(s) to send and personalize by recipient:** [Choose which report\(s\)/document\(s\) to send](#) in the "Email" step; and fill out their prompts to filter the content for each recipient
8. **Add an Email Directory:** Add an [Email Directory](#) that looks up an email address for each item on the mailing list; resulting in a separate email for each recipient (For example: Look up an email address for each employee who received a check to send them their pay statement).

9. **Finish setting up the Task:** Confirm the last settings in the [Options](#) step and finish Task Setup

## 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.

Each MyAssistant Task has the following parts:

**Condition:** What MyAssistant should monitor in Sage and the criteria that information should meet. [Click here](#) for a table that helps identify what record information is stored in based on where it's viewed or entered in Sage.

**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"

Test Timberline Construction... + Add Row + Add Group Convert to Advanced X² Add Formula

List of: JC Cost Code

Condition:

And

JC Cost Code Group Cost Code = False

JC Cost Code Status ≠ Complete

JC Job Status ≠ Closed

Total Job-to-Date Cost minus Total Estimate on a Cost Code > 500

Job	Cost Code	Description	Total Estimate	JTD Cost	Total_Job-to-Date_C...
03-001	2-140	Dewatering	99475.83	100638.68	1162.85
03-001	2-220	Excavate & Backfill	144649.07	154167.12	9518.05
03-001	2-520	Cement Paving	6980.60	7715.07	734.47
03-001	2-900	Landscaping	3250.00	4500.00	1250.00
03-001	7-200	Insulation	0.00	11800.00	11800.00
03-001	8-410	Entrance Doors	0.00	1500.00	1500.00
03-002	2-140	Dewatering	4392.16	5053.23	661.07
03-002	3-210	Reinforcing Steel	6117.31	16119.67	10002.36
03-002	3-220	Welded Wire Fabric	928.01	1645.65	717.64
03-002	7-200	Insulation	0.00	16239.80	16239.80
03-002	9-210	Drywall Plaster	0.00	15500.00	15500.00

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

Check For - Preview

Data Folders

Schedule

Email

Task Options

Specify the Sage 300 CRE data folders that this task will run on.

	Sage 300 CRE Folder	Run Task On
▶	Timberline Construction	<input checked="" type="checkbox"/>
	Gold Coast Group	<input type="checkbox"/>

**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.

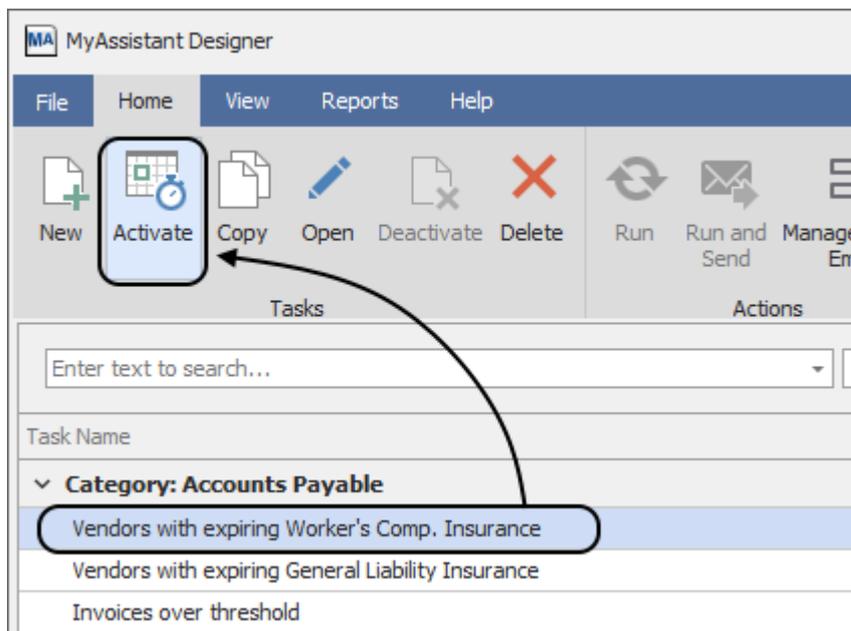
## Activating a Task

To start using a prebuilt Task in MyAssistant, it must be activated. Activating a Task opens the Task Setup wizard, which steps through the preset settings on the Task so they can be customized. Specifying recipients and what each recipient receives is also part of activating a Task.

When a Task is activated, its font changes to bold and the color changes from black to blue.

Customers with no Credit Limit entered
<b>Send AR Aging by Job Spreadsheet</b>
AR Aging Detail by Job Spreadsheet
Send Customers an Email
Companies with items not posted in Accounts Receivable

To activate a Task, select a Task displayed in black, non-bold font; and click "Activate" in the button bar:



If this is the first time a Task is being activated, the Task Setup window will open. If not, a prompt will appear asking one of two things:

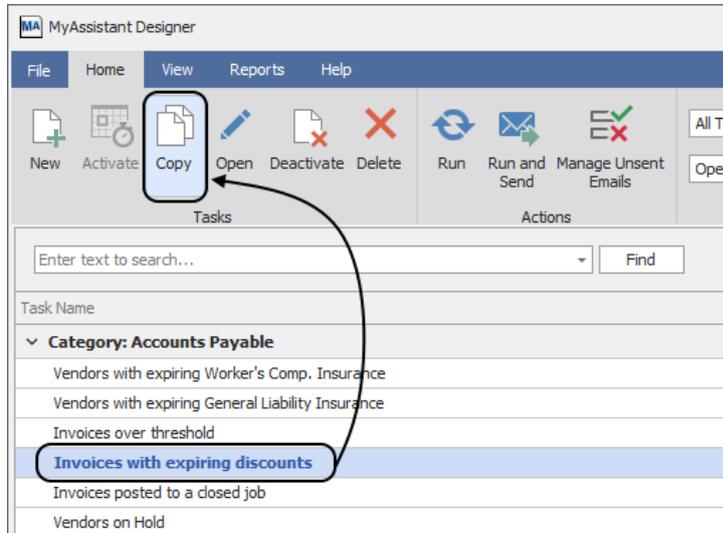
- If MyAssistant is [monitoring multiple Sage data folders](#), a prompt will appear to specify a Data Folder. After selecting a data folder, a prompt will appear to run the Task.
- If MyAssistant is currently monitoring one Sage data folder, the prompt will ask if the Task should be run.

## Copy a Task

Sometimes more than one Task that looks up the same information is needed; because each Task will send different emails to different recipients. For example: one Task may send each employee their pay statement every week, while a second Task sends a spreadsheet of all PR checks cut that week to someone in management. In this case, both Tasks need to look up PR Checks from the most recent pay period.

To save time in these situations, the first Task can be copied to create the second. A copied Task will initially have the same Condition, Schedule, recipients and email content as the first; which can all be changed without affecting the first Task.

To copy a Task, select it in the main MyAssistant window and click "Copy" in the button bar.

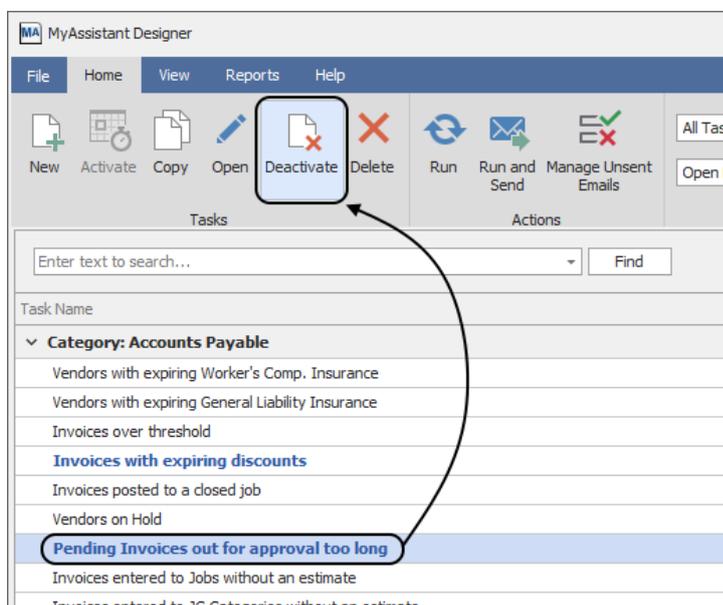


A window will open with a prompt to name the copied Task and choose if it should be activated.

## Deactivating a Task

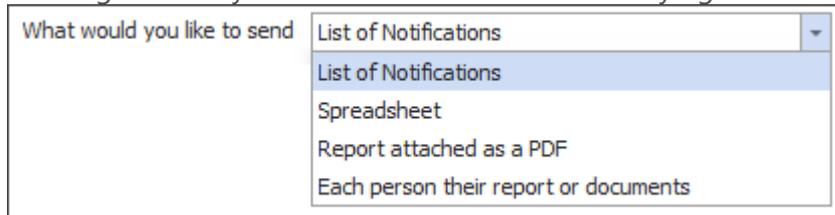
If a Task is no longer needed for any reason, it can be "deactivated"; or turned off. A deactivated Task cannot run or send emails, and will not appear in the "Activated Tasks" view.

To deactivate a Task, select the Task displayed in bold, blue text in the main MyAssistant window and click "Deactivate" in the button bar



# What to Send Step

To help better understand the link between what is sent from a Task and how it's set up, creating a new MyAssistant Task starts with identifying what to send:

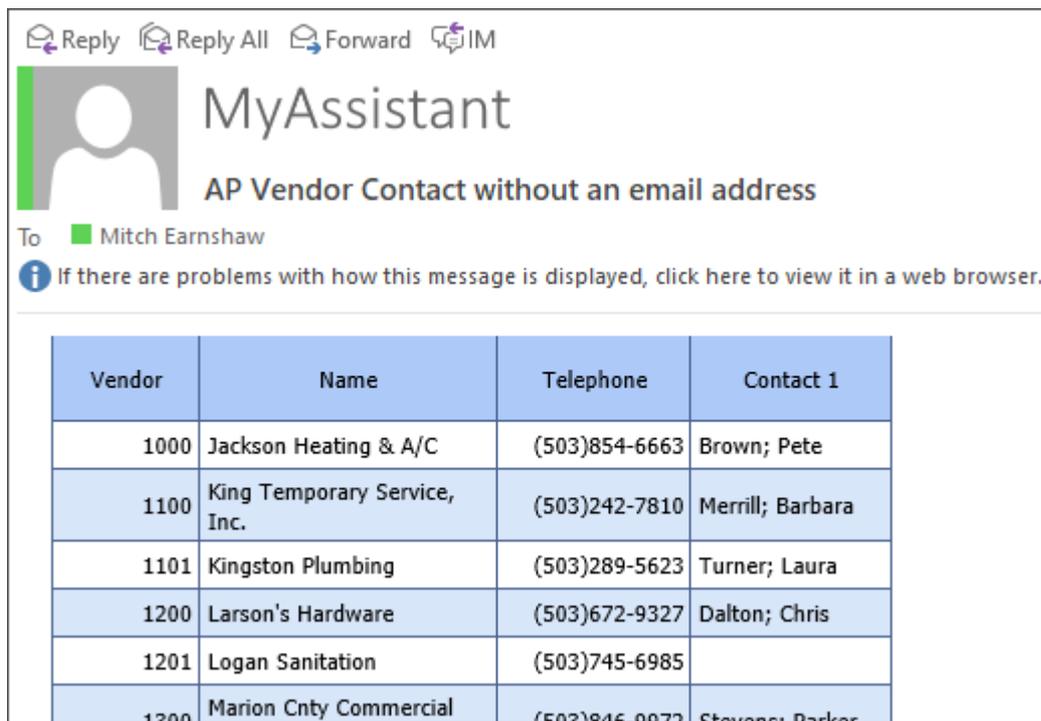


A screenshot of a dropdown menu titled "What would you like to send". The menu is open, showing several options: "List of Notifications" (highlighted), "List of Notifications", "Spreadsheet", "Report attached as a PDF", and "Each person their report or documents".

This selection changes what is seen in MyAssistant to help educate how choices affect what's emailed.

"What to Send" features the following options:

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



A screenshot of an email interface. At the top, there are icons for "Reply", "Reply All", "Forward", and "IM". Below these is the "MyAssistant" logo and the subject line "AP Vendor Contact without an email address". The recipient is listed as "To: Mitch Earnshaw". A message icon with an information symbol says "If there are problems with how this message is displayed, click here to view it in a web browser." Below this is a table with the following data:

Vendor	Name	Telephone	Contact 1
1000	Jackson Heating & A/C	(503)854-6663	Brown; Pete
1100	King Temporary Service, Inc.	(503)242-7810	Merrill; Barbara
1101	Kingston Plumbing	(503)289-5623	Turner; Laura
1200	Larson's Hardware	(503)672-9327	Dalton; Chris
1201	Logan Sanitation	(503)745-6985	
1300	Marion Cnty Commercial	(503)846-9977	Stevens; Parker

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.

MyAssistant  
Work-In-Process Spreadsheet  
To: Mitch Earnshaw

WIP Spreadsheet.xlsx  
8 KB

	A	B	C	D	E	F	G	H	
1	Work In Progress Report								
3	Job	Description	Contract Amount	Billed To Date	Percent Billed	Total Estimate	Cost To Date	Percent Complete	Pe
4	03-001	NW Food Warehouse	2,489,500.00	885,800.00	36%	2,341,200.38	757,152.25	32%	
5	03-002	Clackamas Office Park #4	831,930.00	122,000.00	15%	805,471.61	175,558.04	22%	
6	03-003	Fort Wayne Officer's Club	479,300.00	41,425.00	9%	442,347.39	148,440.09	34%	
7	03-004	Metro Bus Stop 47	18,000.00	-	0%	14,315.00	-	0%	
8	03-005	Metro Bus Stop 39	18,000.00	-	0%	14,315.00	-	0%	
9	03-006	PGE Line WO#345	-	110.00	100%	-	14,589.11	-	
10	03-007	Low Income Housing	-	-	0%	-	-	0%	
11	03-008	Deep Canyon Area Devlop	-	-	0%	-	-	0%	

After selecting this option, the next step is to decide what should print on [each line in the 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. Next, click the dropdown next to "Send a list of" and pick what Sage information to send in a list. For example, to send a list of Jobs recently set up in Sage, select "JC Job" in the "Spreadsheet of" dropdown:

Specify what you want to send

What would you like to send: Spreadsheet

Spreadsheet of: Select...  
# Search...  
Frequently Used  
JC Cost Code  
JC Job  
JC Transaction  
PR Check  
PR Employee

Conditions: # Search...  
NEW CONDITION

[Click here](#) for a table that helps identify what record information is stored in based on where it's viewed or entered in Sage.

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

Next, select a prebuilt **Condition** or choose to create a new one. The Condition determines which Sage records are sent to someone. The list of available Conditions is filtered to those that look at the same Sage record specified in the "Send a List of" (for example: Jobs, Vendors, 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:

What would you like to send: List of Notifications

Send a list of: JC Job

Conditions: # Search...  
NEW CONDITION  
Accounts Payable  
JC Jobs closed one year ago  
JC Jobs where work is complete and not fully billed  
JC Jobs with Payroll time last week  
Accounts Receivable / Billing  
JC Jobs billing retainage and pending Change Requests exist in PJ  
JC Jobs not billed in specified days that have a retainage balance  
JC Jobs not billed in specified days with costs since the last billing

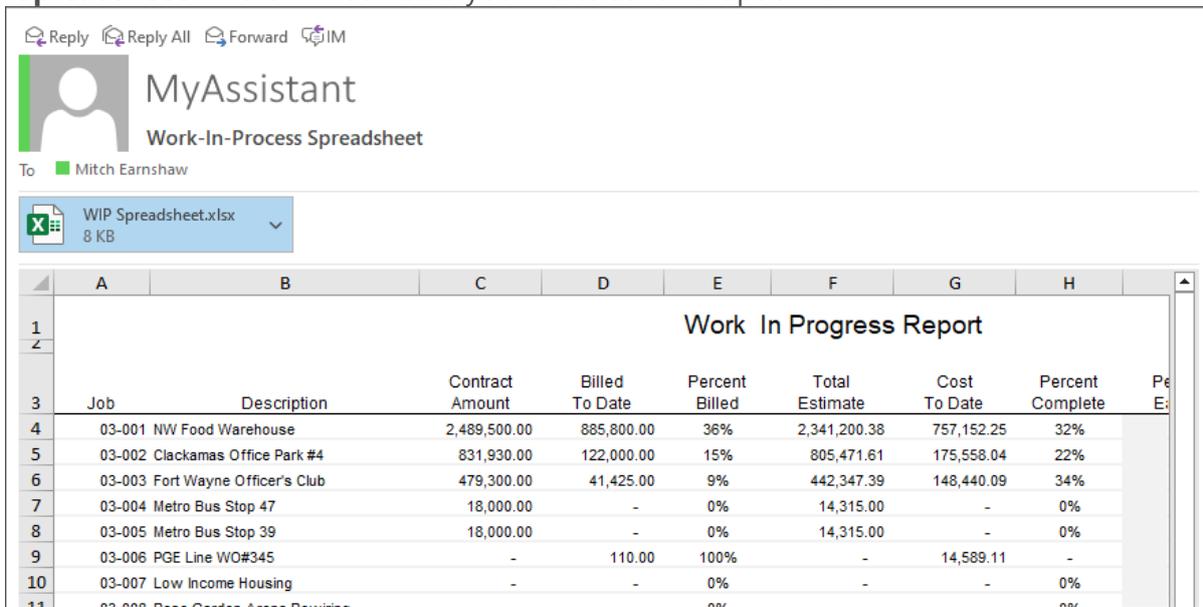
Show all

**Note:** When activating a prebuilt Task or modifying a Task that has previously been activated, the "List of" record cannot be changed.

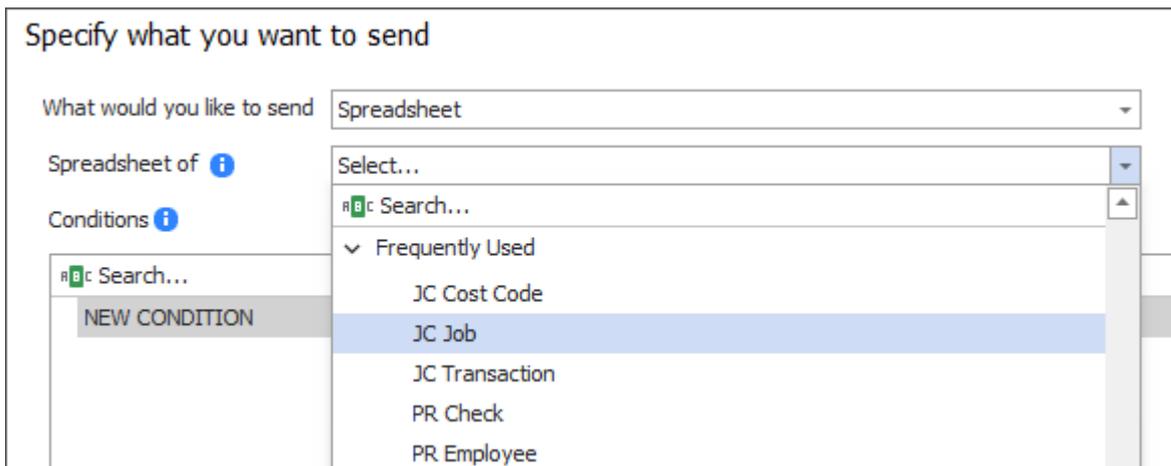
Click **Next** to go to the [Condition](#) step to preview/customize the Condition.

# Send a Spreadsheet

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



Next, click the dropdown next to "Spreadsheet of" and pick what Sage information you want listed in a spreadsheet. For example, to send a spreadsheet of Jobs recently set up in Sage, select "Jobs" from the "Spreadsheet of" dropdown:



[Click here](#) for a table that helps identify what record information is stored in based on where it's viewed or entered in Sage.

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

Next, select a prebuilt **Condition** or choose to create a new one. The Condition determines which Sage records are sent in a spreadsheet. The list of available Conditions is filtered to those that look at the same Sage record specified in the "Spreadsheet of" dropdown (for example: Jobs, Vendors, etc.).

**Example:** If "JC Jobs" is selected in the "Spreadsheet of" dropdown, the list will show only Conditions that also create a spreadsheet of Jobs:

What would you like to send

Spreadsheet of

Conditions ⓘ

Search...

- NEW CONDITION
- Accounts Payable
  - JC Jobs closed one year ago
  - JC Jobs where work is complete and not fully billed
  - JC Jobs with Payroll time last week
- Accounts Receivable / Billing
  - JC Jobs billing retainage and pending Change Requests exist in PJ
  - JC Jobs not billed in specified days that have a retainage balance
  - JC Jobs not billed in specified days with costs since the last billing

Show all

**Note:** When activating a prebuilt Task or modifying a Task that has previously been activated, the "Spreadsheet of" record cannot be changed.

Click "Next" to go to the [Condition](#) step to preview/customize the Condition.

## 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.

Specify what you want to send

What would you like to send

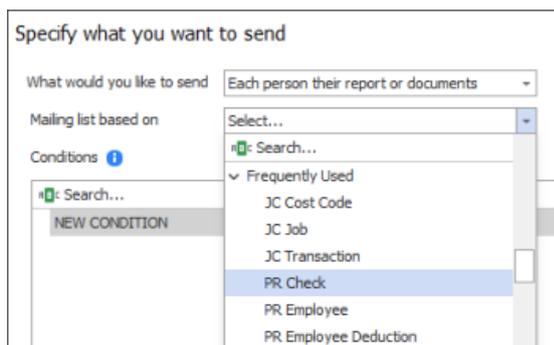
Report for each

Click Next To Continue

# Each Person Their Report or Documents

**Each person their report or documents:** This option is used to send each recipient only their information. After choosing to send "Each person their report or documents"; the next step is to identify what Sage information (i.e. record) will be used to create a mailing list. A mailing list identifies who needs to be emailed and who doesn't.

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

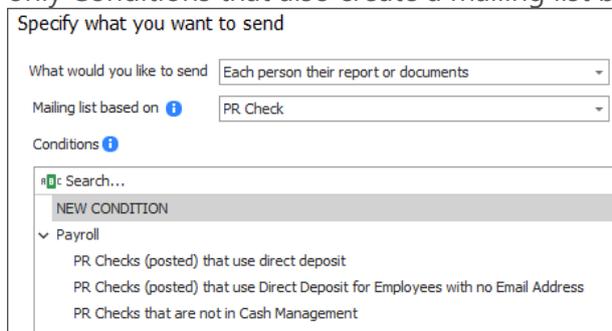


[Click here](#) for a table that helps identify what record information is stored in based on where it's viewed or entered in Sage.

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

Next, select a prebuilt **Condition** or choose to create a new one. The Condition determines which Sage records are used to create the mailing list. The Conditions list is filtered to those that look at the same Sage record specified in the "Mailing list based on" field.

**Example:** If "PR Checks" selected in the "Mailing list based on dropdown", the list will show only Conditions that also create a mailing list based on PR Checks:



**Note:** When activating a prebuilt Task or modifying a Task that has previously been activated, the "Mailing list based on" record cannot be changed.

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

# Condition Step

MyAssistant [Tasks](#) monitor for specific situations using a Condition. Conditions are 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
Subcontracts that are not signed	JC Commitments where the "Signed Received" box isn't checked and the Vendor's Type is "Subcontractor"
AP Invoices Coded to a JC Cost Code without an Estimate	AP Invoice Distributions where the associated JC Cost Code's "Total Estimate" is zero
PR Employees paid this pay period	PR Checks with a period end date in the last week and a Direct Deposit amount greater than zero

When a Task runs, the Condition is applied to the Sage database and creates a list of Sage records. This list can be:

- Included in the [body of the email](#)
- Used to fill in a [spreadsheet template](#), or
- Used as a mailing list to send each recipient [their reports or documents](#)

[Click here](#) for a table that helps identify what record information is stored in based on where it's viewed or entered in Sage.

## 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:

Preview + Add Row Add Group Convert to Advanced X<sup>2</sup> Add Formula

List of:

Filter:

And

- JC Job Status  $\neq$  Closed
- JC Commitment Closed = False
- JC Commitment Date In the last specified days 15
- JC Commitment Amount  $\geq$  5000
- AP Vendor Name Contains Electric

**Tip:** 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. [Click here](#) for more information.

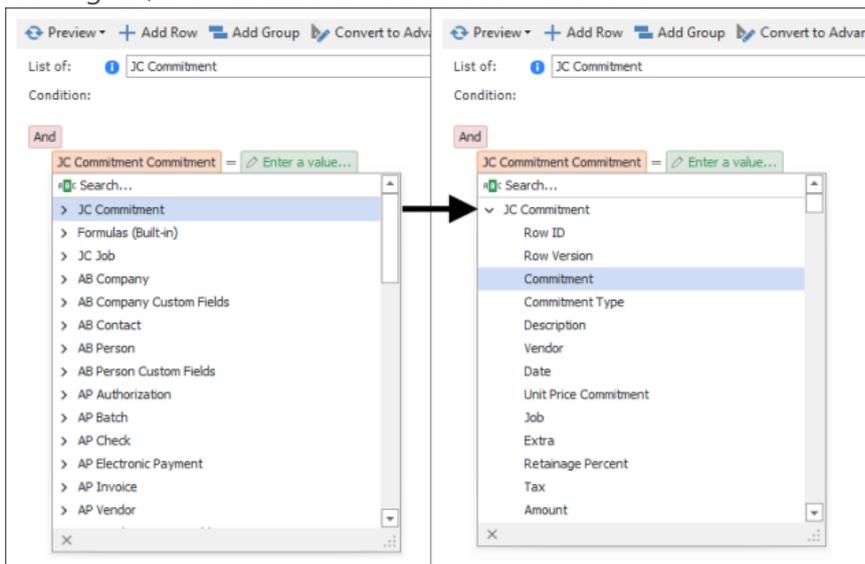
# Building a Condition

The Condition on a Task is the criteria that filter the items you're looking for (for example: 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:

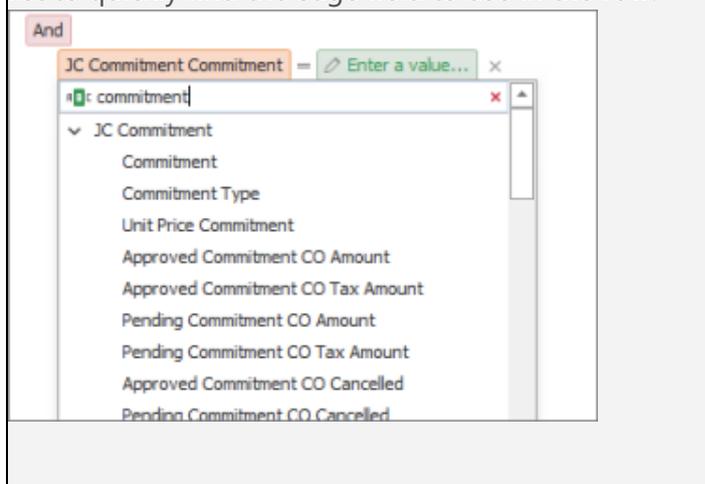
## Selecting the Sage Field / Formula

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:



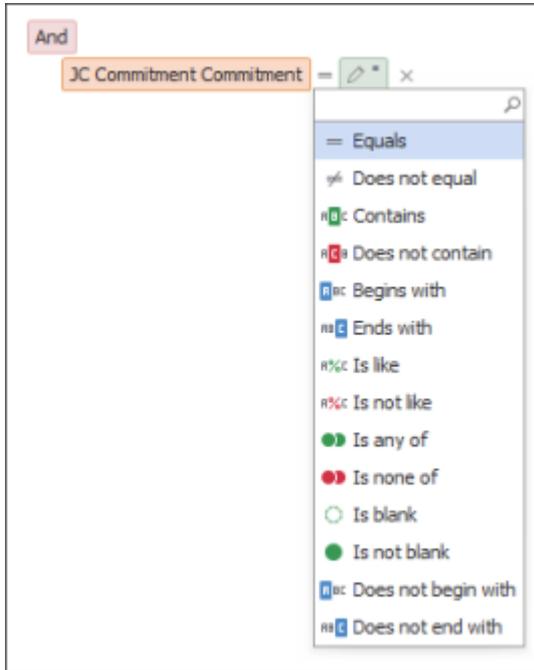
[Click here](#) for a table that helps identify what record information is stored in based on where it's viewed or entered in Sage.

**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)

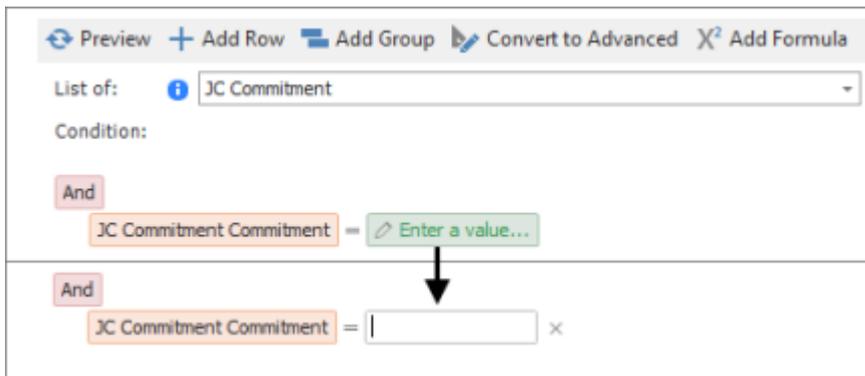


Related: [All available operands](#)

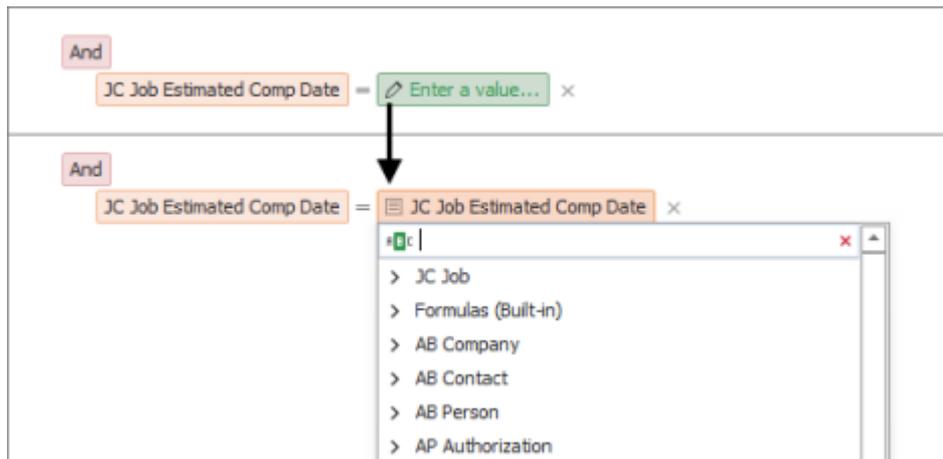
## Specify the field or Enter a Value

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:



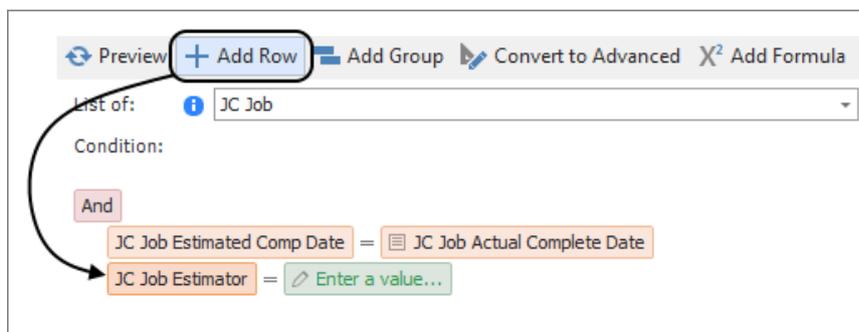
To select a Sage field or formula: click the pencil icon, click the field & choose the correct Sage field or formula from the list:



### 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.

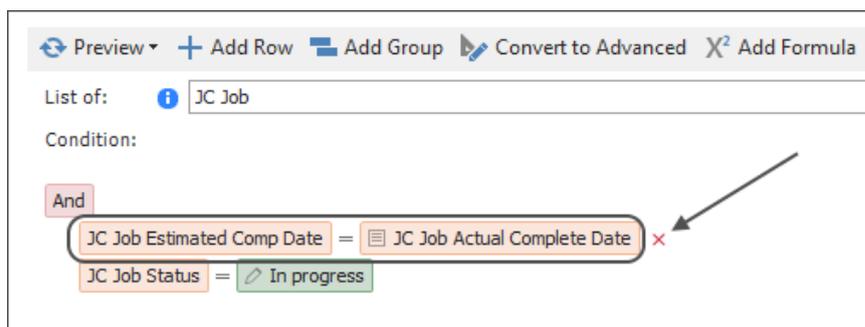
To add a row to a Condition, click "Add Row" in the button bar at the top:



Use the previous steps to modify the newly added row.

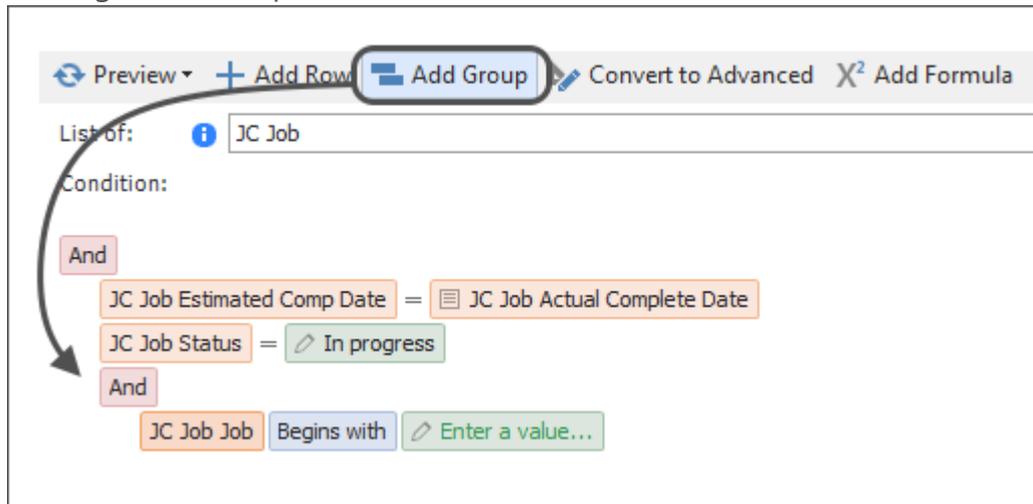
### Delete a row

Remove a row from a Condition by hovering on the row, then clicking the "x" that appears to the right:



## Add a group

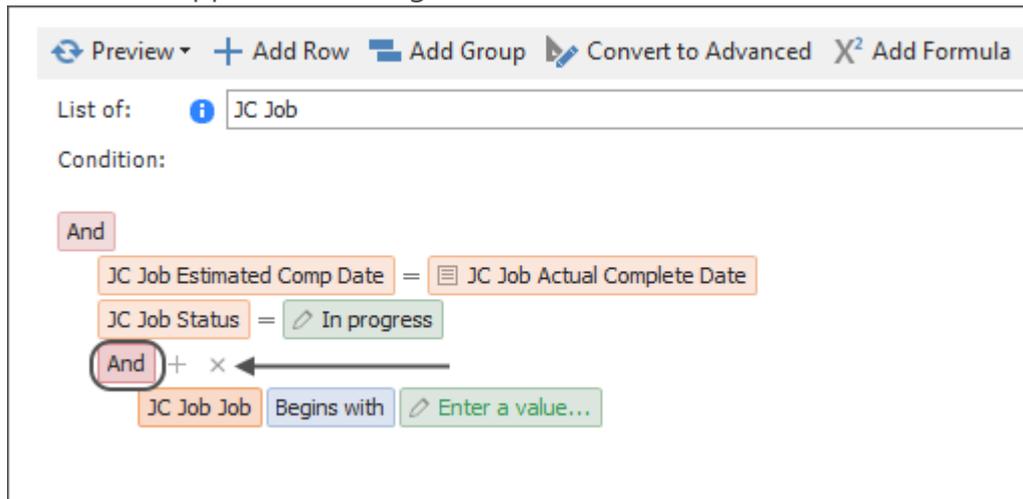
Add groups to combine or change optional and required criteria in a Condition by clicking "Add Group" in the ribbon.



For more information on Groups, [click here](#).

## Remove a group

Remove a group from a Condition by hovering on the group heading, then clicking the "x" that appears to the right:



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

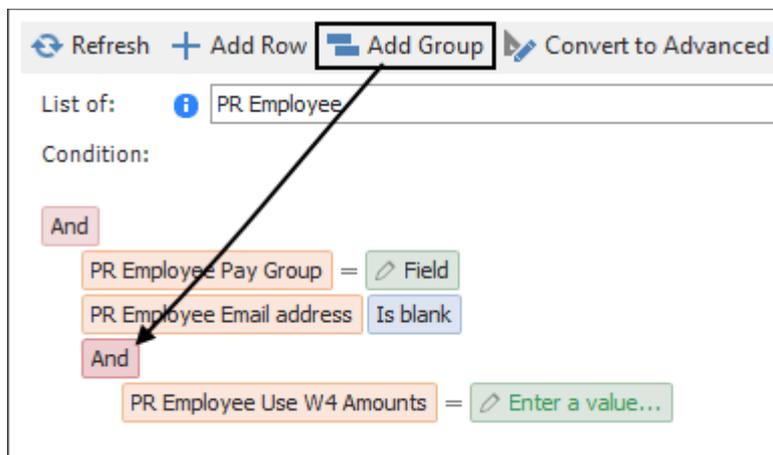
**"OR" Groups:** One of the criteria in the group must be met

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

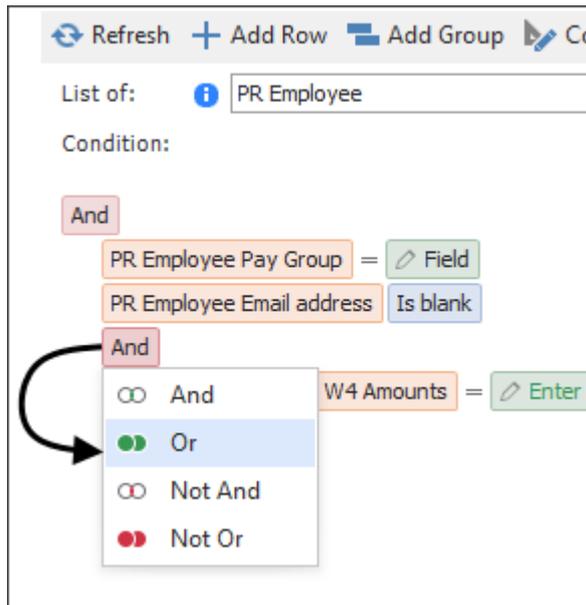
## Add or Change Groups

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:



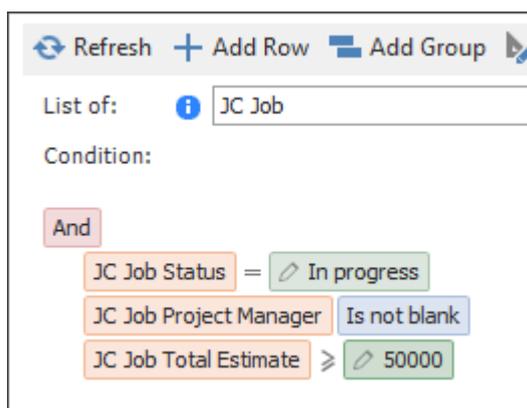
**Tip:** Add groups to the end of a Condition to help stay organized as to what criteria is falling under which group. It's technically possible (though not advised) to have criteria from an outer group under an inner group, but always putting groups at the end of your criteria ensures conditions are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

List of: PR Employee

Condition:

Or

- PR Employee Address 1 Is blank
- PR Employee City Is blank
- PR Employee State Is blank
- PR Employee Zip Code Is blank

**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:

List of: PR Employee

Condition:

And

- PR Employee Pay Group = Field
- PR Employee Email address Is blank

Or

- PR Employee Termination Date Is blank
- PR Employee Termination Date < PR Employee Rehire Date

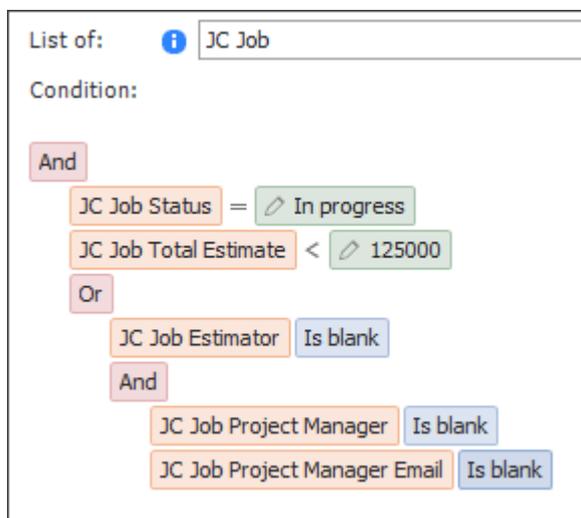
**What this means:** This Condition is looking for specific Employees in Payroll. To be included in any emails or attachments sent by MyAssistant, an Employee must meet the first two criteria, and at least one of the criteria under the "OR":

- 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
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   Wiring
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   University
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   23
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   100
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   Admin
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   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   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   100  101  103
Is blank	The field or formula specified is blank	To see Employees with no Email Address in PR Employee Setup: PR Employee Email address
Is not blank	The text field is not blank	To see Employees with Email Addresses in PR Employee Setup: PR Employee Email address
Does not begin with	The text from the field or formula to the left of the operand does not 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   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   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 200000
[...] 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: <b>AP Electronic Payment Payment Date</b> <b>Is today</b>
 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: <b>JC Commitment Date</b> <b>Is before today</b>
 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: <b>AP Invoice Due Back Date</b> <b>Is after today</b>
<b>7</b> 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: <b>AP Invoice Discount Date</b> <b>In the next specified days</b>  15
<b>7</b> 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: <b>JC Transaction Transaction Date</b> <b>In the last specified days</b>  7
<b>31</b> 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: <b>JC Job Estimated Comp Date</b> <b>Is more than specified days in the future</b>  90
<b>31</b> 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: <b>AP Invoice Invoice Date</b> <b>Is more than specified days ago</b>  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: <b>PR Check Period End Date</b> <b>In the last specified days or newer</b>  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: <b>AP Vendor Work Comp Expir Dt</b> <b>In the next specified days or older</b>  30
<b>[...]</b> 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: <b>JC Job Estimated Comp Date</b> <b>Is between</b>  6/30/2022 <b>and</b>  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: <b>PR Check Check Date</b> <b>Is beyond this year</b>
<b>=</b> 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: <b>AP Vendor GL Ins Expiration Dt</b> <b>=</b>  12/31/2022
<b>≠</b> 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: <b>AP Invoice Invoice Date</b> <b>≠</b>  <b>AP Invoice Accounting Date</b>
<b>&gt;</b> 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: <b>JC Job Last Cost Update</b> <b>&gt;</b>  <b>Last time a Job was billed</b>
<b>&gt;=</b> 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: <b>PR Check Period End Date</b> <b>&gt;=</b>  <b>PR Check Check Date</b>

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: <b>JC Commitment Date</b> < <b>JC Commitment Contract Signed Date</b>
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: <b>JC Job Actual Complete Date</b> ≤ <b>JC Job Last Cost Update</b>
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: <b>AP Vendor Work Comp Expir Dt</b> <b>Is blank</b>
Is not blank	The date from the field or formula to the left of the operand is not blank	To see Jobs that have had overtime and when they had it: <b>Last time a Job had overtime</b> <b>Is not blank</b>
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: <b>AP Credit Card Payment Payment Date</b> <b>Is in date range</b> from <b>12/1/2022</b> to <b>12/31/2022</b>
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: <b>AP Vendor Last Inv Date</b> <b>Is not in date range</b> <b>1/1/2022</b> and <b>12/31/2022</b>
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: <b>JC Cost Code Estimated Comp Date</b> <b>Is later this year</b>
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: <b>Hire-rehire anniversary for an Employee</b> <b>Is in the next 30 days</b>
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: <b>JC Commitment Delivery Date</b> <b>Is in the next week</b>
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: <b>AP Vendor Last Check Date</b> <b>Is in this year</b>
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: <b>Last time a Job was billed</b> <b>Is in this month</b>
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: <b>PR Check Check Date</b> <b>Is in the last week</b>
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: <b>AP Invoice Accounting Date</b> <b>Is in the last 30 days</b>
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: <b>PR Employee Hire Date</b> <b>Is earlier this year</b>
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: <b>JC Commitment Last Check Date</b> <b>Is prior to this year</b>
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: <b>AP Invoice Invoice Date</b> <b>Is same day</b> <b>AP Invoice Payment Date</b>
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: <b>AP Electronic Payment Payment Date</b> <b>Is this month</b>

 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: <b>JC Job Actual Start Date</b> <b>Is this week</b>
 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: <b>PM Lease Actual Lease End</b> <b>Is this year</b>
 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: <b>AP Vendor Auto Ins Expir Dt</b> <b>Is next month</b>
 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: <b>JC Commitment Scheduled Start Date</b> <b>Is next year</b>
 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: <b>AP Check Check Date</b> <b>Is last month</b>
 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: <b>PR Employee Termination Date</b> <b>Is last year</b>
 Is the year-to-date period	The date from the field or formula to the left of the operand is between the 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: <b>AP Invoice Invoice Date</b> <b>Is the year-to-date period</b>
 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: <b>PR Employee Birth Date</b> <b>Is January</b>
 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: <b>PR Employee Hire Date</b> <b>Is February</b>
 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: <b>PR Employee Birth Date</b> <b>Is March</b>
 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: <b>PR Employee Rehire Date</b> <b>Is April</b>
 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: <b>PR Employee Birth Date</b> <b>Is May</b>
 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: <b>PR Employee Birth Date</b> <b>Is June</b>
 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: <b>PR Employee Hire Date</b> <b>Is July</b>
 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: <b>PR Employee Birth Date</b> <b>Is August</b>
 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: <b>JC Job Actual Complete Date</b> <b>Is September</b>
 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 October: <b>PR Employee Termination Date</b> <b>Is October</b>
 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: <b>PR Employee Birth Date</b> <b>Is November</b>
 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: <b>PR Employee Birth Date</b> <b>Is December</b>

# Advanced Conditions

## IMPORTANT

This section is about "Advanced Conditions" in MyAssistant; created by clicking "Convert to Advanced" in the Condition Step of Task Setup. For information on standard Conditions, click [here](#).

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.

# Understanding Advanced Conditions

## IMPORTANT

This section is about "Advanced Conditions" in MyAssistant; created by clicking "Convert to Advanced" in the Condition Step of Task Setup. For information on standard Conditions, click [here](#).

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 Advanced Conditions

### IMPORTANT

This section is about "Advanced Conditions" in MyAssistant; created by clicking "Convert to Advanced" in the Condition Step of Task Setup. For information on standard Conditions, click [here](#).

Conditions can be created while you are creating a new Task.

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 Advanced Conditions

### IMPORTANT

This section is about "Advanced Conditions" in MyAssistant; created by clicking "Convert to Advanced" in the Condition Step of Task Setup. For information on standard Conditions, click [here](#).

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:

Expand a data table in the Available Columns list

Select the Sage 300 CRE data field that you wish to view in the test

Click on the right arrow to add the field to the list of Columns in the results.

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.

## Selecting Advanced Conditions

### IMPORTANT

This section is about "Advanced Conditions" in MyAssistant; created by clicking "Convert to Advanced" in the Condition Step of Task Setup. For information on standard Conditions, click [here](#).

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.

# Copying Advanced Conditions

## IMPORTANT

This section is about "Advanced Conditions" in MyAssistant; created by clicking "Convert to Advanced" in the Condition Step of Task Setup. For information on standard Conditions, click [here](#).

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:

Click File > Define Conditions

Click Open

Select the Condition you would like to edit, then click OK

Click Copy in the toolbar

Enter a unique name for the Condition, then click OK

Modify the Condition

Click Save

# Editing Advanced Conditions

## IMPORTANT

This section is about "Advanced Conditions" in MyAssistant; created by clicking "Convert to Advanced" in the Condition Step of Task Setup. For information on standard Conditions, click [here](#).

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.

# Deleting Conditions

## IMPORTANT

This section is about "Advanced Conditions" in MyAssistant; created by clicking "Convert to Advanced" in the Condition Step of Task Setup. For information on standard Conditions, click [here](#).

To Delete a Condition:

Make sure no Tasks are using the Condition you would like to delete

Click File > Define Conditions

Click Open

Select the Condition you would like to delete, then click OK

Click Delete in the toolbar. A confirmation message will be displayed.

Please note: Prebuilt Conditions may not be deleted.

# Functions

## IMPORTANT

This section is about "Advanced Conditions" in MyAssistant; created by clicking "Convert to Advanced" in the Condition Step of Task Setup. For information on standard Conditions, click [here](#).

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'))
```

## **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
```

## **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())
```

## **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
```

## **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())
```

## **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
```

## **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
```

## **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.

### **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"
```

### **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"
```

## **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)
```

### **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'
```

### **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'
```

### **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)
```

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

These expressions are 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" = "
```

### **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'))
```

### **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"
```

**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"))
```

# 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).

**Note:** If a Task runs on a schedule but doesn't find anything needs to be sent (For example: nothing matches the **Condition** criteria, or nothing **new needs to be sent out**), emails will not be sent.

### Daily Schedule Customizations

A "Daily" schedule lets you choose:

- What time the Task runs
- What days the Task will run (for example: every day, every other day, every 3 days, etc.)

The screenshot shows a dialog box titled "Run This Task". It has four radio buttons: "Daily" (selected), "Weekly", "Monthly", and "Once". Below these is another radio button labeled "At the conclusion of a Sage 300 CRE program". Underneath, there is a time selection field set to "12:00 AM" and a frequency field set to "Every 1 day(s)".

### 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 (for example: every week, every other week, etc.)

The screenshot shows a dialog box titled "Run This Task". It has four radio buttons: "Daily", "Weekly" (selected), "Monthly", and "Once". Below these is another radio button labeled "At the conclusion of a Sage 300 CRE program". Underneath, there is a time selection field set to "06:00 AM" and a frequency field set to "Every 1 week(s) on:". Below the frequency field, there are seven checkboxes for the days of the week: Monday (checked), Tuesday (unchecked), Wednesday (checked), Thursday (unchecked), Friday (checked), Saturday (unchecked), and Sunday (unchecked).

## 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 (for example: the 15th), or
  - A specific day (for example: the last Monday of the month)
- Which months the Task will run

**Run This Task**  
 Daily    Weekly    Monthly    Once  
 At the conclusion of a Sage 300 CRE program  
At:   
 Day  of the month(s).  
 The   of the month(s).  
 January    April    July    October  
 February    May    August    November  
 March    June    September    December

# Email Step

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

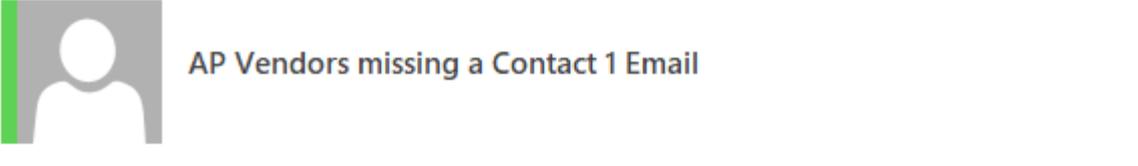
The Task can send emails to the recipients specified in the To, Cc and Bcc lines; or MyAssistant can look up who to notify based on the information found by the Task. For more information on recipients, [click here](#).

## 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 (for example: 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



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.

Vendor	Name	Phone	Contact	General Liability		Auto		Worker's Compensation		Umbrella	
				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; Colin	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

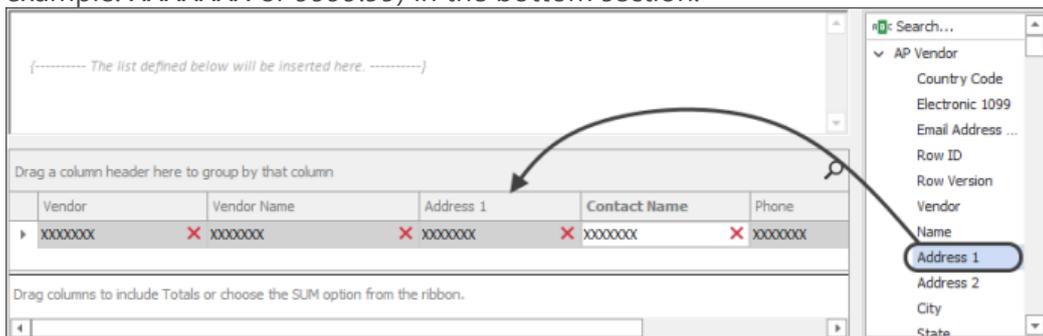
Almost any report from a Sage reports menu can be emailed [as an attached PDF](#) from MyAssistant. Report designs created with Crystal Reports can also be used to send PDFs, Excel spreadsheets or text files as attachments. Documents or attached reports can also be attached and set up so each recipient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

# Send a List of Notifications

Information in Sage can be sent in a list in the body of an email from MyAssistant.

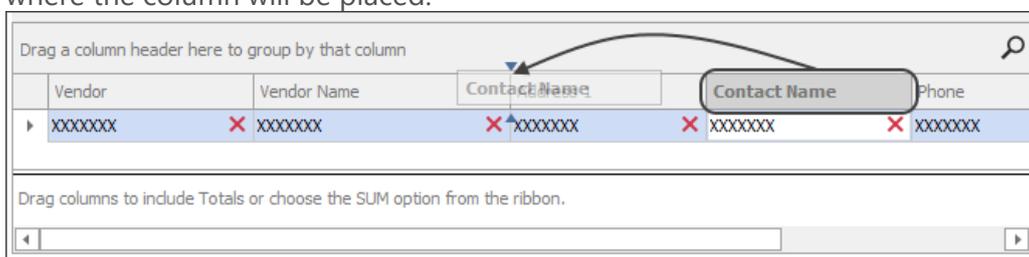
The following outlines the possible steps to create a list in the email. Depending on the desired list sent by the Task, some steps can be skipped. These steps begin in the Email step of Task Setup:

1. **Specify Columns in List:** Select the columns in the emailed list by clicking & dragging Sage fields from the list of available information on the right side of the window. The list on the right contains all the information that can be accessed (grouped by Sage record) based on what you're sending a list of in the email. Columns in the list will appear as a column heading with a placeholder value (for example: XXXXXXXX or 9999.99) in the bottom section:

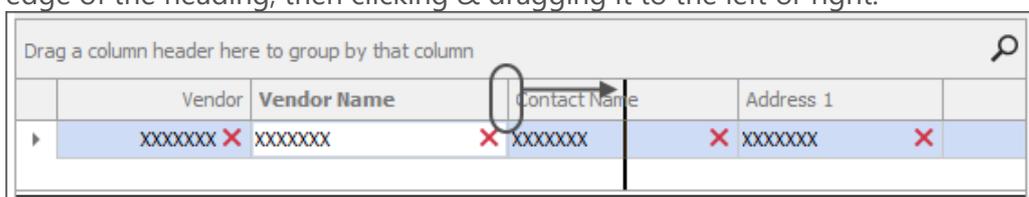


[Click here](#) for a table that helps identify what record information is stored in based on where it's viewed or entered in Sage.

2. **Choose Column Order:** Rearrange the order of how columns will appear in the emailed list by clicking and dragging a column to a new place. Blue triangles indicate where the column will be placed.



3. **Resize Columns:** Change the width of a column in the list by hovering on the right edge of the heading, then clicking & dragging it to the left or right:



4. **Change the list's sort order:** Change the order information appears in the list by clicking on a column heading. Change the sort between ascending and descending by clicking on the triangle that appears on the right side of the column heading

Drag a column header here to group by that column			
Vendor	Vendor Name	Contact Name	Address 1
▶	XXXXXXXX X	XXXXXXXX	XXXXXXXX

5. **Change column headings:** Change the the description at the top of a column in the list by double-clicking on a column heading and typing a new description:

Drag a column header here to group by that column			
Vendor	Name	Contact Name	Address 1
▶	XXXXXXXX X	XXXXXXXX	XXXXXXXX

6. **Group the list:** Group the list by clicking and dragging a column from the list to the section labeled "Drag a column header here to group by that column":

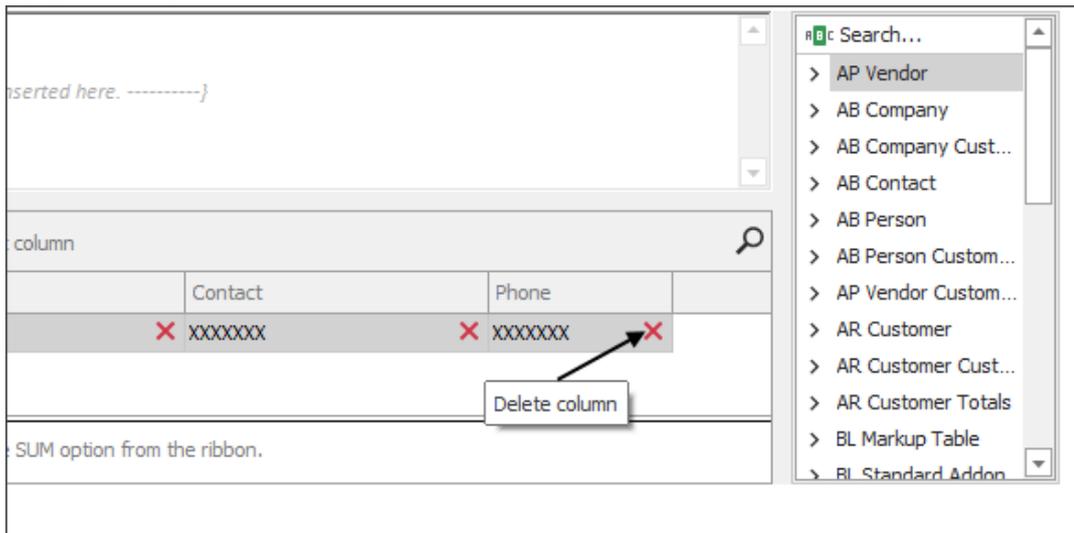
Drag a column header here to group by that column				
Vendor	Vendor Name	Type	Address 1	Phone
▶	XXXXXXXX X	XXXXXXXX	XXXXXXXX	XXXXXXXX

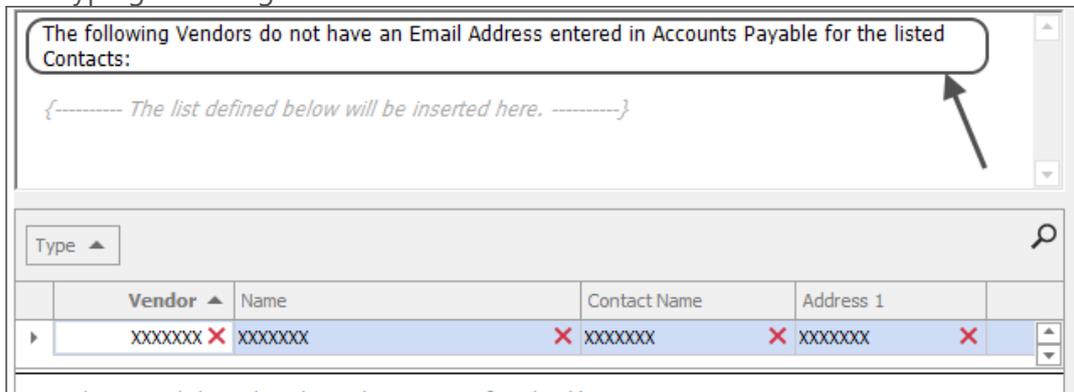
Type				
Vendor	Vendor Name	Address 1	Phone	WC Expiration I
▼ Type: XXXXXXXX				
▶	XXXXXXXX X	XXXXXXXX	XXXXXXXX	12/16/9999

For example: JC Cost Codes can be grouped by Job, AP Invoices by Vendor, or AR Invoices by Customer.

- Remove columns:** Remove any unwanted columns by clicking the **X** under the column header.



- Add a message in the email:** Add text that will appear above or below the list in the email by clicking above or below the text "*The list defined below will be inserted here*" and typing a message:



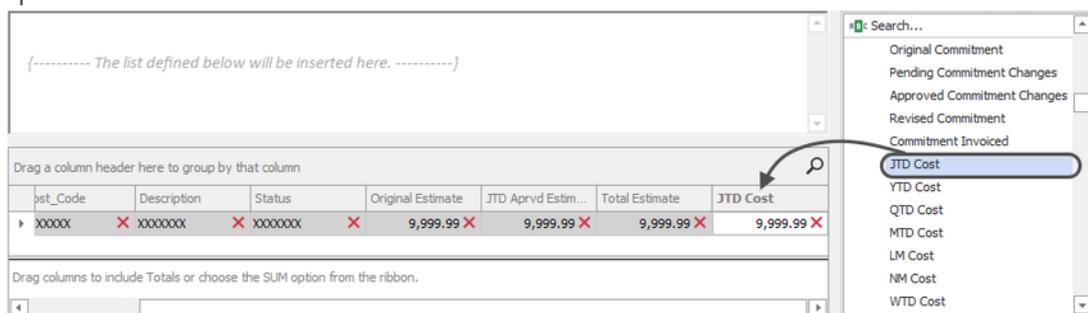
- Finish setting up the Task:** When finished, click "Next" in the bottom-right of the window to proceed to the [Options](#) step of Task Setup.

# Send a Spreadsheet

Information in Sage can be sent in a spreadsheet using a MyAssistant Spreadsheet Template. Spreadsheet Templates define a spreadsheet's content and layout.

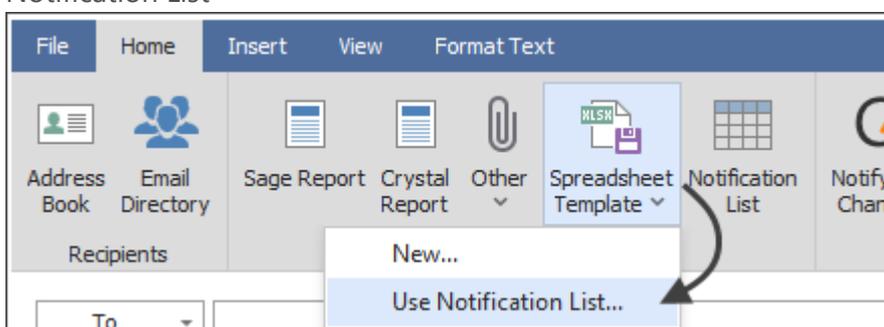
The following outlines the possible steps to create a Spreadsheet Template. Depending on the desired spreadsheet(s) sent by the Task, some steps can be skipped. These steps begin in the Email step of Task Setup:

1. **Specify columns in spreadsheet:** Select the columns that will be in the spreadsheet by clicking & dragging Sage fields from the list of available information on the right side of the window to the table at the bottom. The table will be used to create a spreadsheet.



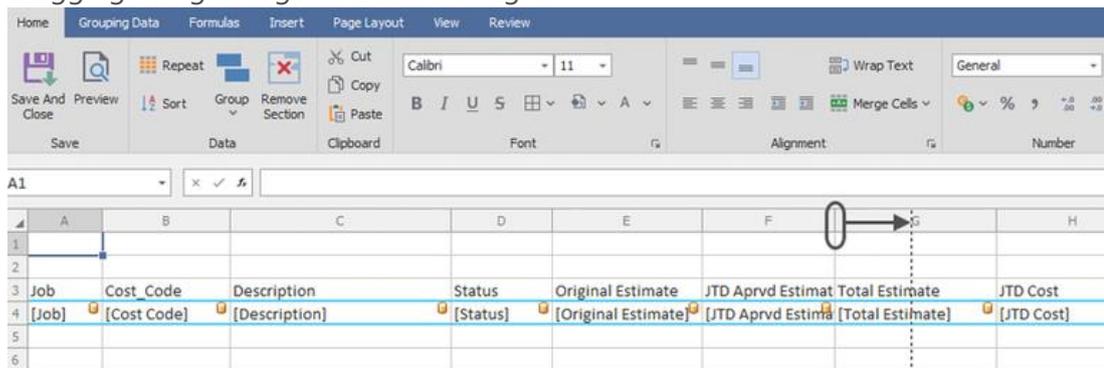
The list on the right side of the window contains all the information that can be accessed (grouped by Sage record) based on what you're sending a spreadsheet of attached to the email. [Click here](#) for a table that helps identify what record information is stored in based on where it's viewed or entered in Sage.

2. **Create Spreadsheet Template:** Create the template MyAssistant will use to send spreadsheets by clicking "Spreadsheet Template" in the ribbon and selecting "Use Notification List"

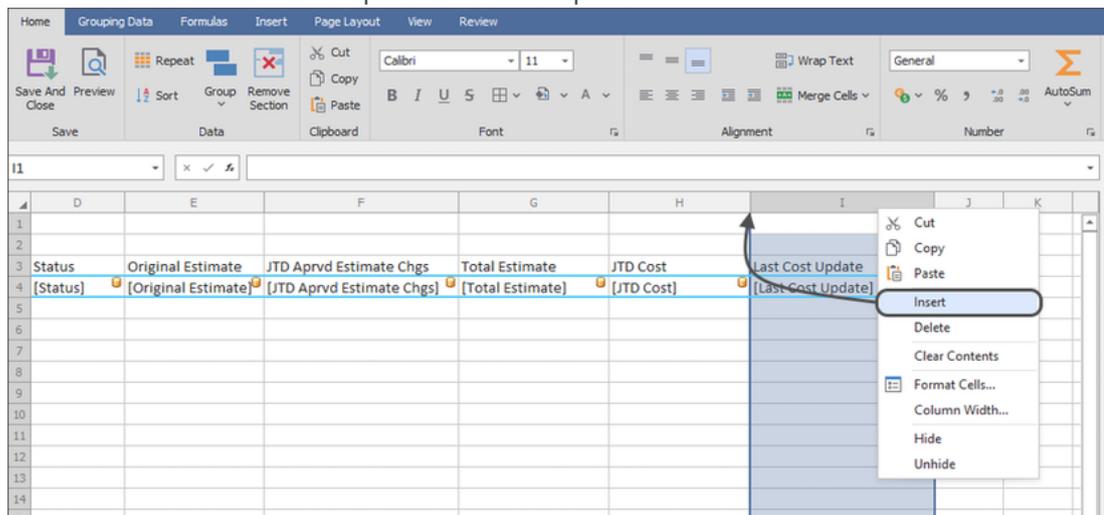


This will open a template containing the fields from the table at the bottom of the Email step

- 3. Resize Columns:** Change the width of any column in the spreadsheet by clicking and dragging its right edge to the left or right

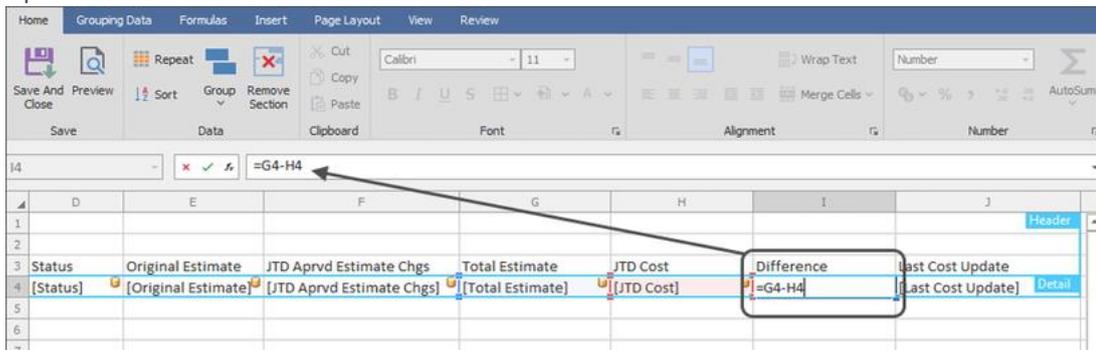


- 4. Preview the spreadsheet:** Review the spreadsheet's content, sort order and layout by clicking "Preview" in the ribbon
- 5. Update the title:** Change and/or move the title of the spreadsheet placed in cell A1. MyAssistant uses the Subject line from the Email step of Task Setup to prefill the spreadsheet title
- 6. Add columns:** Right-click on a column and select "Insert" to add a column to the left of the one selected in the Spreadsheet Template

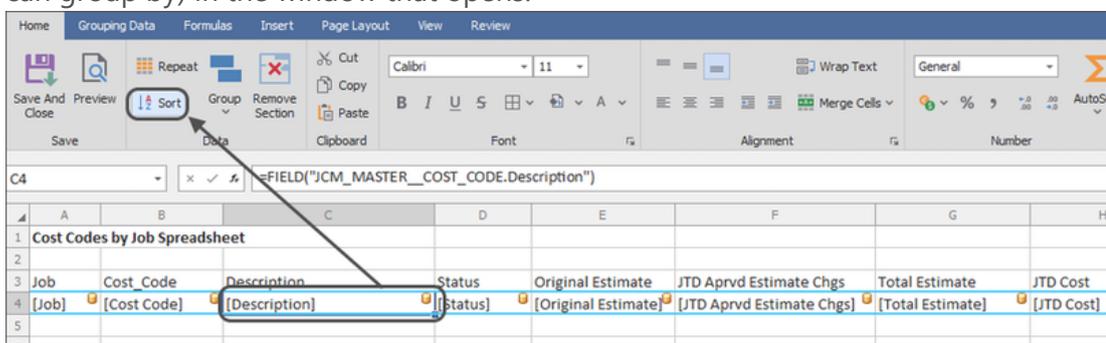


Repeat as desired to add as many columns as desired to a spreadsheet

- Add information:** Add any spreadsheet formulas (for example: " $=D4+E4$ ") by selecting a blank cell in the Repeat section (blue box labeled "Detail") and typing in a spreadsheet formula, or by dragging a Sage field from the list on the right into an open cell

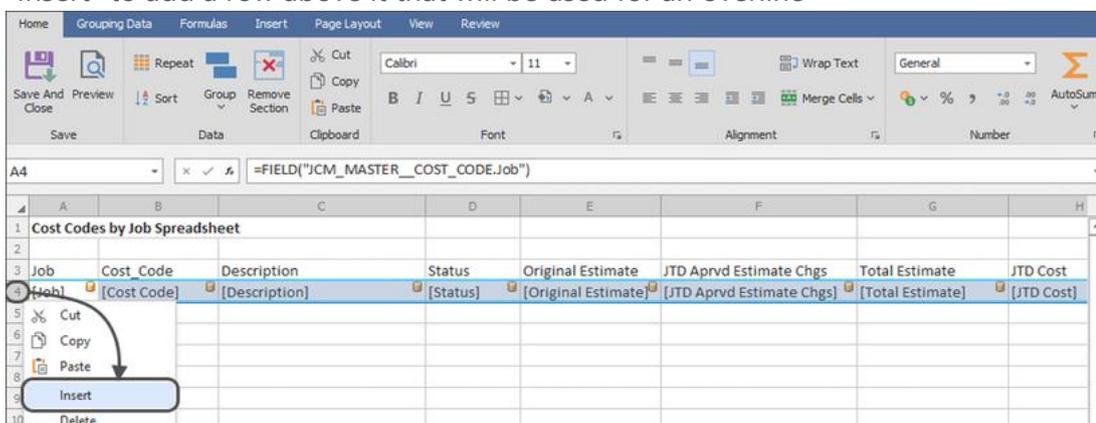


- Set the spreadsheet's sort order:** Change the order information appears in the spreadsheet by selecting any cell in the Repeat section, then clicking the "Sort" button in the ribbon. Choose how the spreadsheet will be sorted (and what information you can group by) in the window that opens:

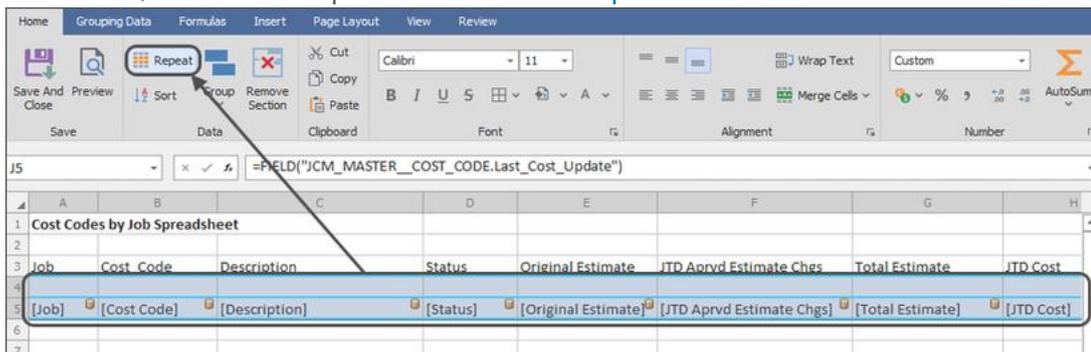


[Click here](#) for more information on sorting a spreadsheet

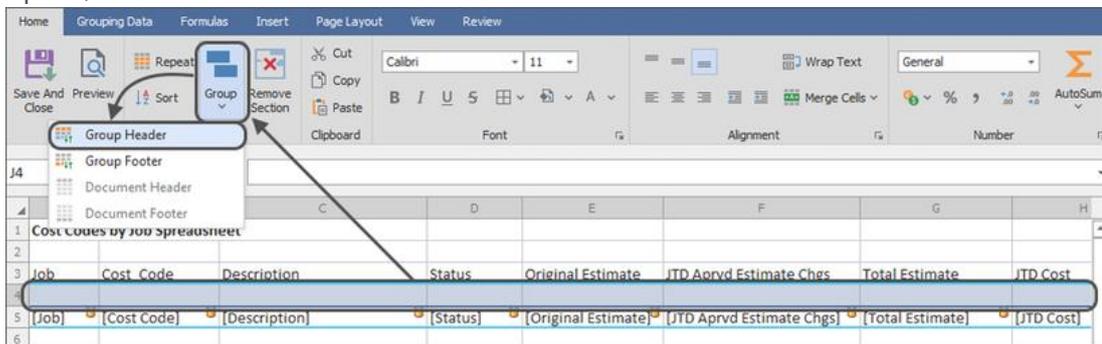
- Add rows for overlines:** Right-click on the row with the Sage fields and select "Insert" to add a row above it that will be used for an overline



10. **Re-set the Repeat Section:** Click and highlight the cells in the inserted row and the row below, then click "Repeat" to re-set the Repeat section

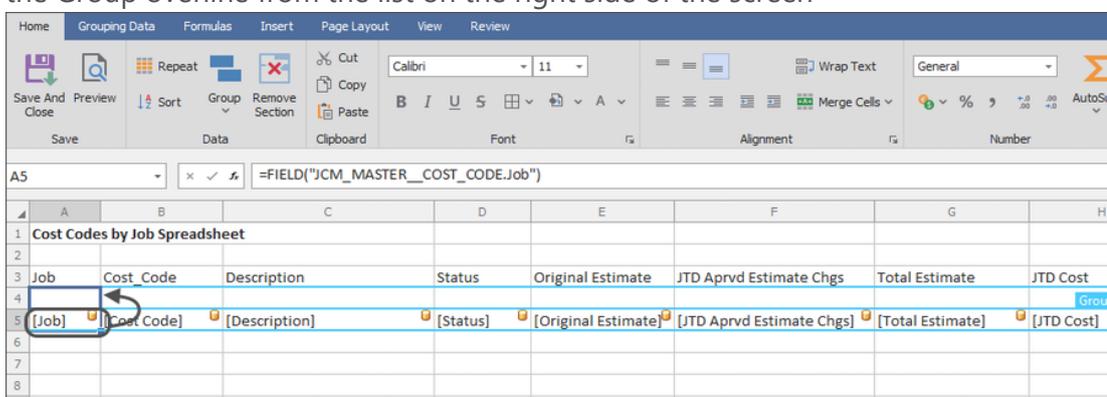


11. **Add the overline:** Add an overline to the spreadsheet by selecting the cells in the top row of the Repeat section, clicking the "Group" button in the ribbon and selecting "Group Header". Choose the field you want to group by in the window that opens, then click OK.



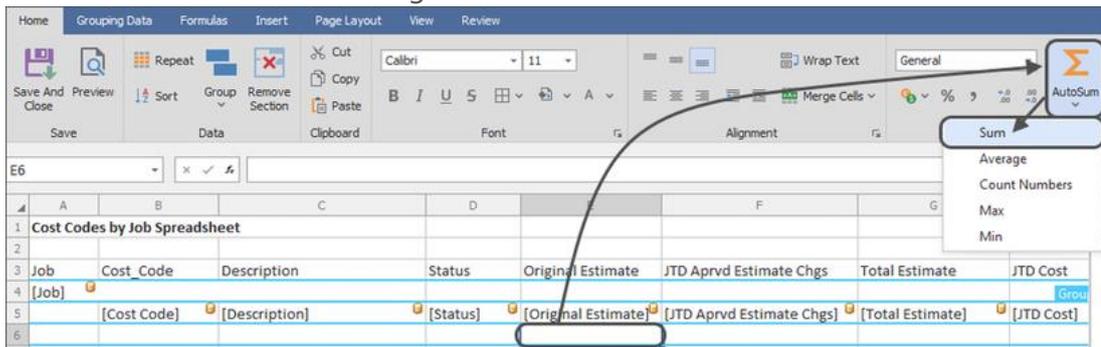
[Click here](#) for more information on Grouping, including Group Footers and having multiple groups in a spreadsheet

12. **Add information to the overline:** Click and drag any Sage fields you want to add to the Group overline from the list on the right side of the screen



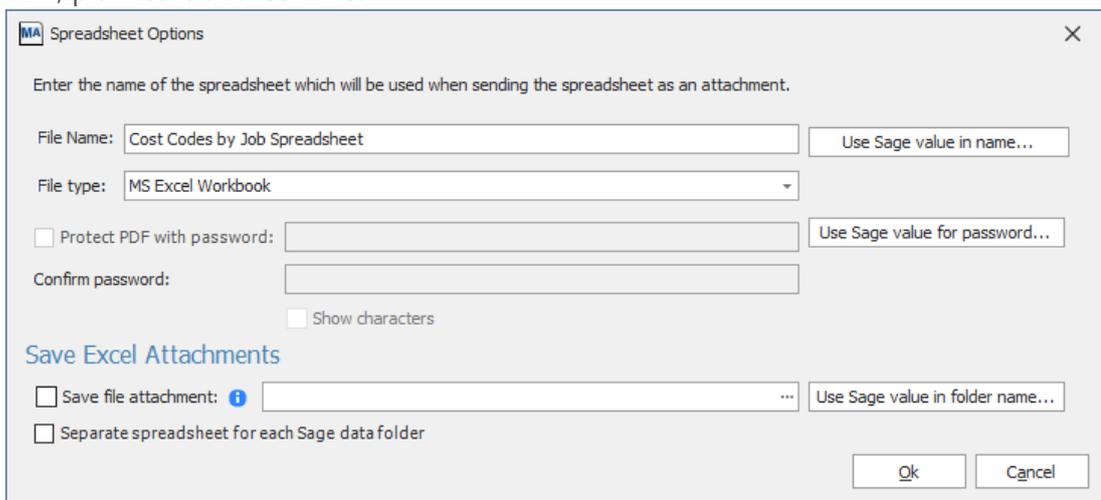
13. **Add a section for grand totals:** Add a section that displays at the end of the spreadsheet by clicking and highlight cells under the Repeat section, then clicking "Group" and selecting "Document Footer"

- Add a grand total:** Add a sum at the bottom of a column by clicking the blank cell in the Document Footer under cell that will show a number, then clicking the "AutoSum" button and selecting "Sum"



[Click here](#) for more information on totals, including having multiple subtotals and a grand total in a spreadsheet

- Preview the spreadsheet:** Confirm the content, sort order and layout of the spreadsheet by clicking the "Preview" button in the ribbon. Close the preview window using the "Close" button in the ribbon or via the "X" in the top-right of the window.
- Save the spreadsheet:** When no other changes are needed, save the spreadsheet template by clicking the "Save and Close" button in the ribbon
- Name the Spreadsheet:** Choose the name of the spreadsheet attached to the email(s) by accepting the default name provided, or entering a new title in the field
- Choose the File Type:** Choose whether the attachment will be an Excel Workbook, a PDF, plain text or a CSV file:



Click OK when finished to save the spreadsheet template to the Task

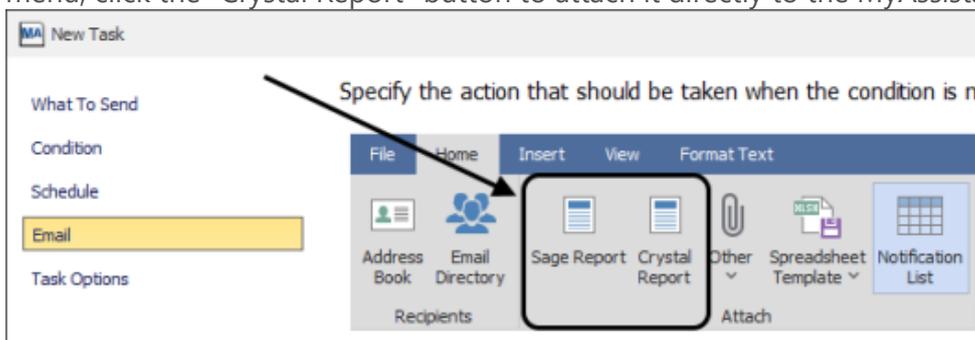
- Choose who should be emailed:** Specify the [recipients](#) that should be sent a spreadsheet by typing email addresses into the "To" & "Cc" lines in the email step, or by adding an Email Directory to [send each person their information](#).
- Finish Task Setup:** When finished in the Email step, proceed to the [Options](#) step (the last step of Task Setup) by clicking the "Next" in the bottom-right of the window.

# Send Reports & Documents

MyAssistant can automatically generate and send reports and documents to recipients.

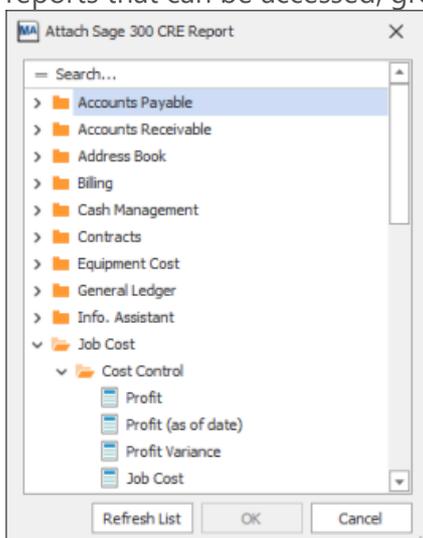
The following outlines the possible steps to attach and send a report where each recipient gets the same information. Depending on the report(s) sent by the Task, some steps can be skipped. These steps begin in the Email step of Task Setup:

1. **Find the report:** Identify if the report that will be attached to the Task is currently on a Sage Reports menu. This may in part depend on what software was used to create the report.
2. **Choose how to attach the report:** If the report is already on a Reports menu in a Sage program, click the "Sage Report" button in the ribbon to attach the report. If the report was created in the Crystal Reports software and is not on a Sage Reports menu, click the "Crystal Report" button to attach it directly to the MyAssistant Task.



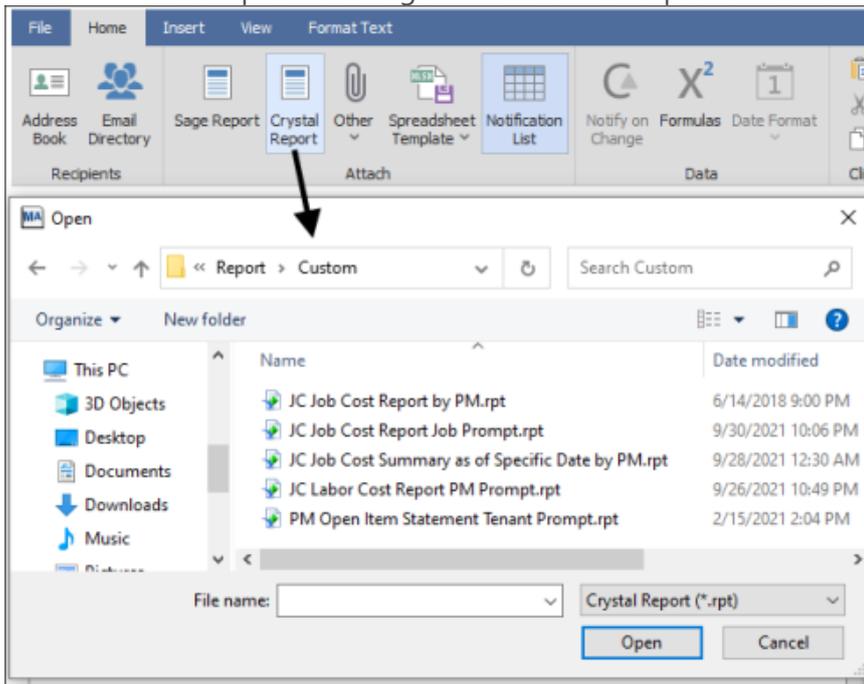
**Note:** If a report was created in Sage Report Designer, it must be attached to a Sage Reports menu before attaching it to a MyAssistant Task. Almost any report on a Reports menu in Sage 300 can be attached to a MyAssistant Task.

3. **Select the report (Sage Report):** If the "Sage Report" button was clicked, navigate to and select the report in the window that opens. This window shows all Sage reports that can be accessed, grouped by application:

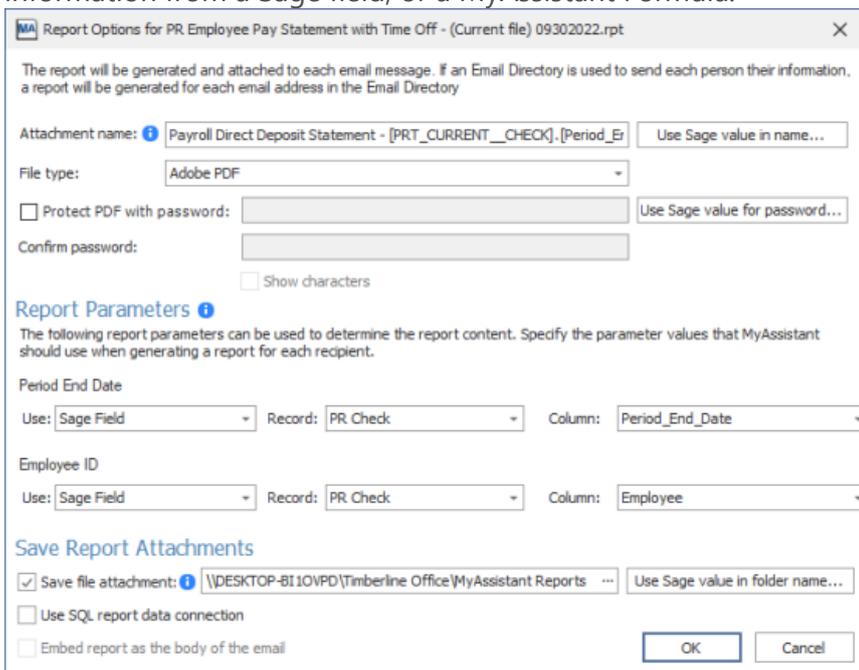


**Tip:** Use the search bar at the top of the list to quickly find the desired report

4. **Select the report (Crystal Report):** If the "Crystal Report" button was clicked, use the window that opens to navigate to where the report is saved on a computer.



5. **Fill out the prompts:** After attaching a report to a Task, a window will open with several options to fill out or confirm. Start with the section labeled Report Parameters -- any prompts that need information to fill out the report are displayed in this section. Prompts can be filled in with one of three options: a specified value, information from a Sage field, or a MyAssistant Formula.



**Note:** A report's content can be independent of the Task Condition -- the key is the report prompts and what Sage information (if any) is used to fill them out. For more information, see [Send Each Person Their Information](#)

6. **Name the attachment:** Fill out the "Attachment name" section at the top of the window to set the name of the report or document attached to the email(s) sent by the Task. Click "Use Sage value in name..." to use information as part of the attachment name. For example: When sending each Customer their monthly statement, add the "Name" field from the AR Customer record to the attachment name.
7. **Choose the attachment type:** Crystal Reports attached to a Task can produce a PDF, an Excel spreadsheet, a plain text document, or Comma Separated Values (CSV) file. Reports attached from Sage always create PDFs.
8. **Set the password:** If sending a PDF, check the box and enter the same password in the two fields that will be required to open the document. To set a unique password by recipient, click the "Use Sage value for password..." button and select a field that has a unique value for each person who will be sent an email. For example: when sending each Employee their weekly pay stub, select the MyAssistant Formula "Last 4 digits of Social Security Number" as the password. This will require each recipient to enter the last four digits of their SSN in order to open their pay stub

**Tip:** Add a sentence to the message that describes their password while still being secure. For example: When sending pay stubs password-protected with the last four digits of the recipient's Social Security Number, type "Your password is the last 4 digits of your SSN" to the message section in the Email step.

9. **Pick where to save a copy of the report:** Copies of reports sent by Tasks can be saved to a location on a computer. Check the box to save a copy of the report, then choose where it will be saved. [Click here for more information](#)
10. **Confirm Report Settings:** Review all the report options selected and information specified, then save changes by clicking "OK" to close the window
11. **Choose who should be emailed:** Specify the [recipients](#) that should be sent a spreadsheet by typing email addresses into the "To" & "Cc" lines in the email step, or by adding an Email Directory to [send each person their information](#).
12. **Add a message:** Type a message in the middle section of the Email step that explains what each recipient is being sent, and any next steps recipients need to take. When sending each person their information, Sage fields can be added to the message to personalize the content by recipient. For example: When sending employees their pay statements, add the "Period End Date" field from the PR Check record, or the Employee Name from the PR Employee record.

**Tip:** [Click here](#) for a table that helps identify what record information is stored in based on where it's viewed or entered in Sage.

13. **Finish Task Setup:** When finished in the Email step, proceed to the [Options](#) step (the last step of Task Setup) by clicking the "Next" in the bottom-right of the window.

## 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

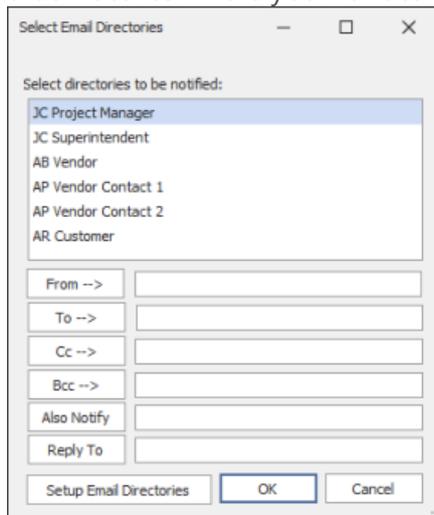
### Keys to Sending Each Person their Information

**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 (for example: the "To" line, "Cc" line, etc.):

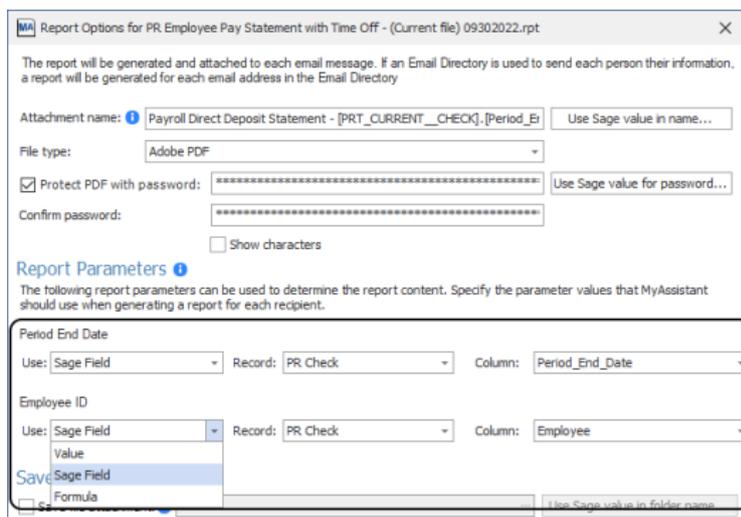


**TIP:** MyAssistant automatically filters what Email Directories are available on a Task, depending on where the Task is looking for email addresses and what information is being looked up by the Task. MyAssistant will only show Email Directories where a direct relationship exists.

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 (for example: 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

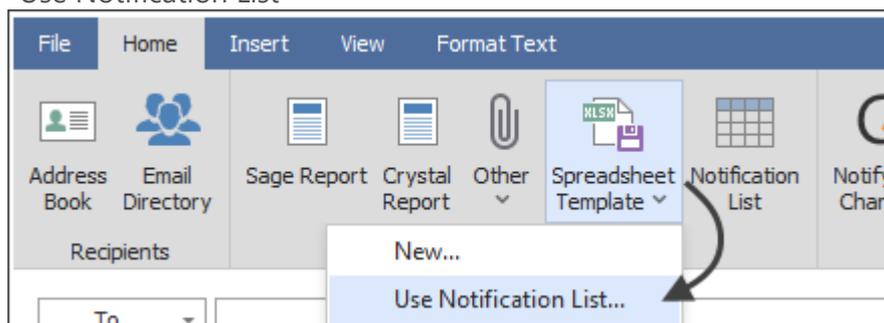
### To send each recipient only their items in a list

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.

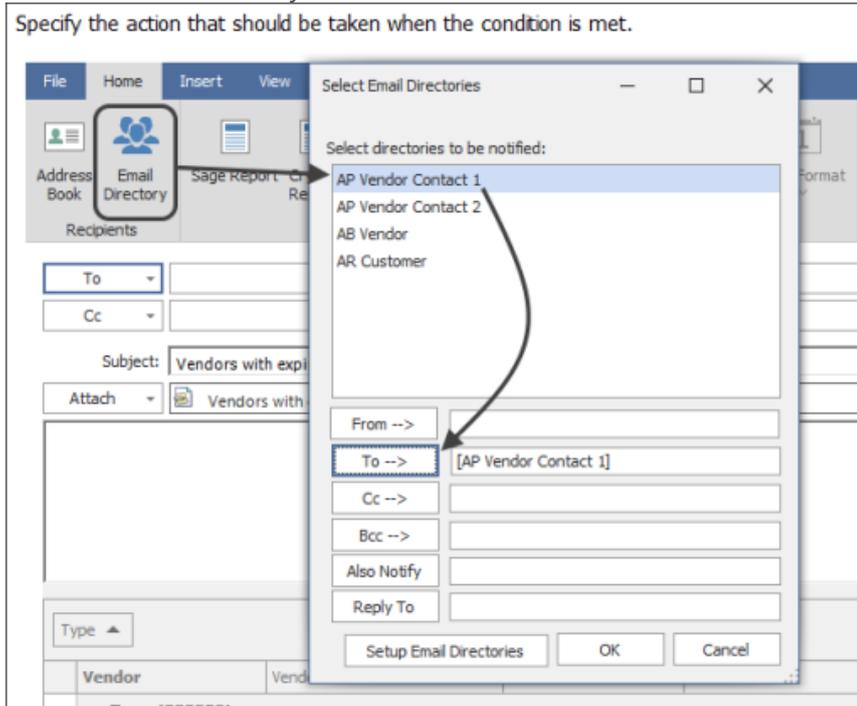
### To send each recipient a spreadsheet of only their information

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](#).

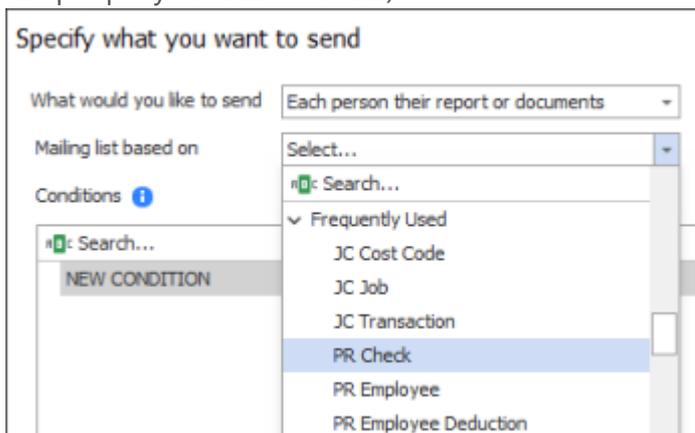
5. Add an Email Directory to the Task



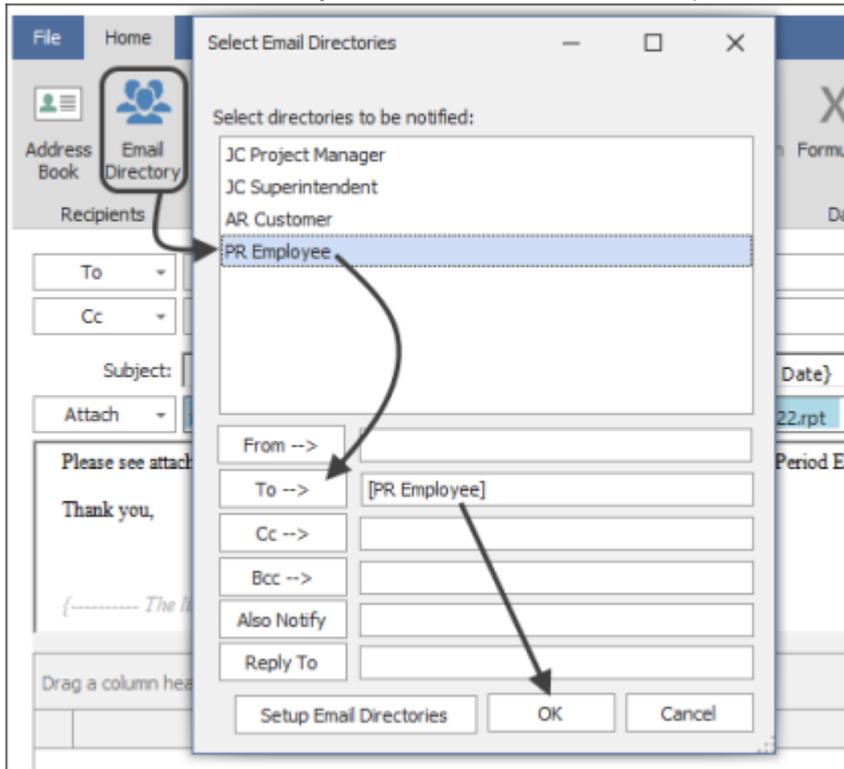
When set up correctly: The Task will send each recipient an email with an attached spreadsheet containing only their information.

**To send each recipient only their documents/reports**

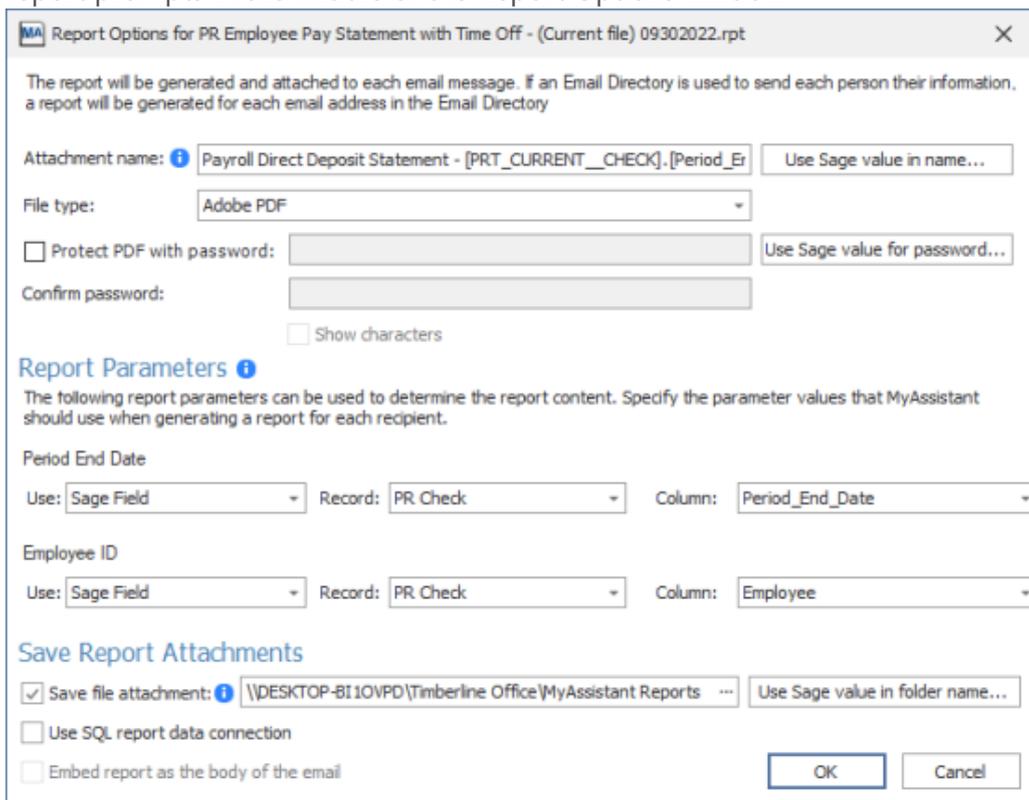
1. Select or create a Condition that will create a mailing list (i.e. only find information for the people you want to email)



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

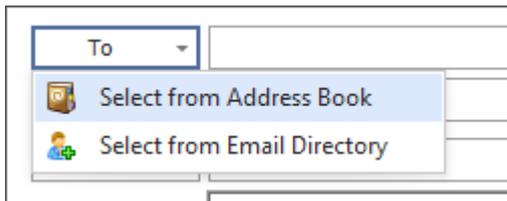
To have a MyAssistant Task send emails to the same recipient(s) every time, type email addresses in the TO or CC fields.

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

## Add from Address Book

If Outlook is installed and configured on the same computer as the MyAssistant Designer, email addresses can be added from the Address Book to Tasks.

To add email addresses from Address Book: Navigate to the Email step of Task Setup, click the "To" or "CC" button and choose "Select from Address Book":



A window will open in Outlook where email addresses can be selected to add to the Task. This helps avoid mistyping someone's email address, and is a way to quickly add several email addresses at once.

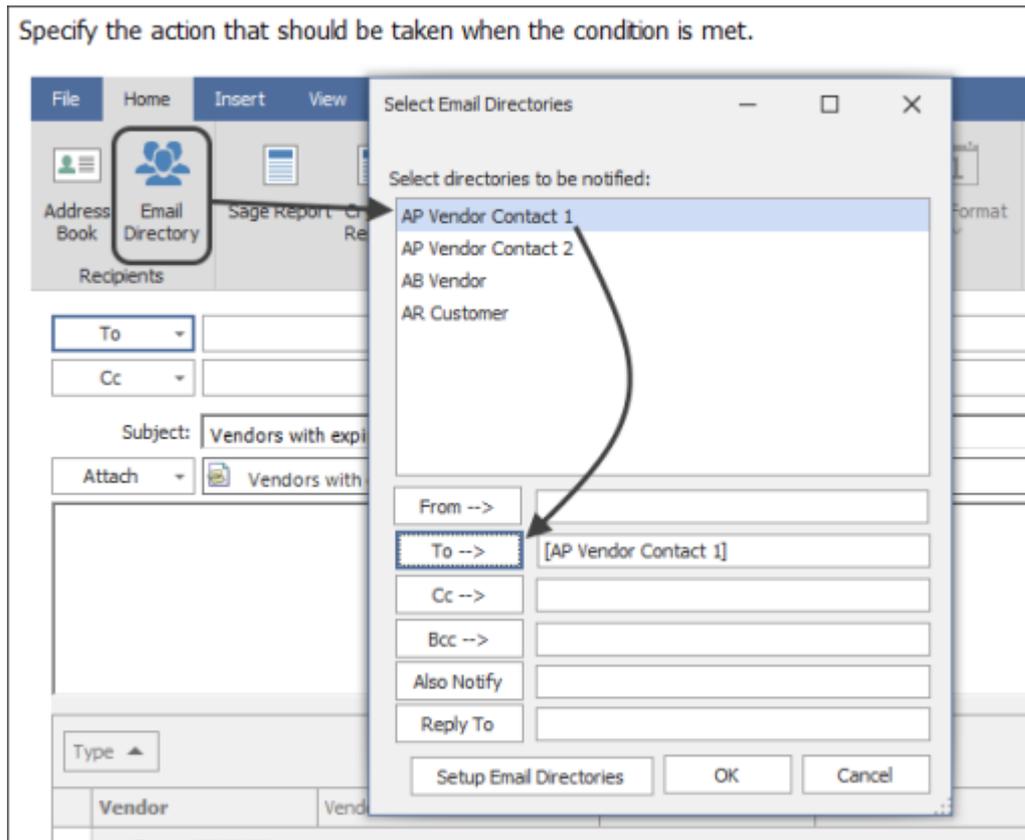
## Email Directories

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

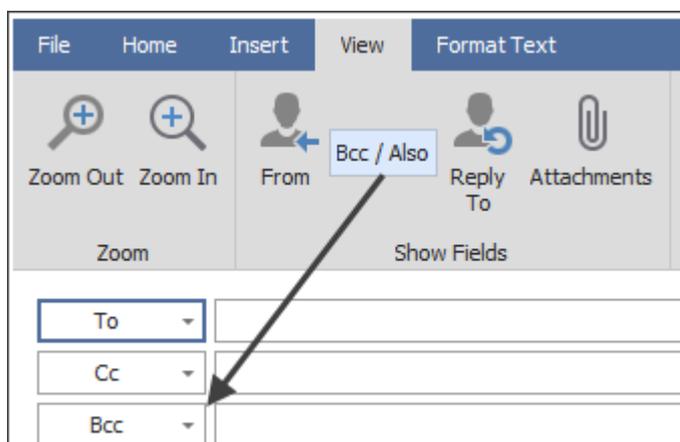
4. Click OK



For more information on Email Directories, click [here](#)

## BCC

To add a recipient as a Bcc (which recipients added to the "To" and "Cc" lines would not see) click the View tab of the ribbon and click the "Bcc/Also" button. Type in email addresses in the field, or click the "Bcc" button to select someone from the Outlook address book.

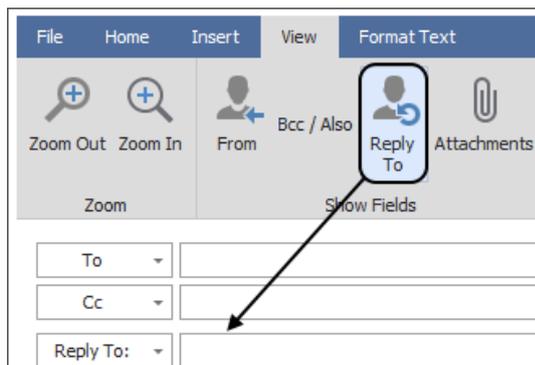


**Tip:** If you do not want a Task to send any emails, leave all recipient fields blank

## Reply To

MyAssistant features the ability to have recipients automatically reply to an email address different than the one that emailed them. This can be useful when MyAssistant is set up to send emails from one account, but the contact the recipient should reply to / contact with questions has a different email address.

To specify a "Reply To" recipient on a Task, go to the Email Step of Task Setup. Click on the View tab of the ribbon and select the "Reply To" button. Type the email address of the "Reply To" contact in the field that appears:

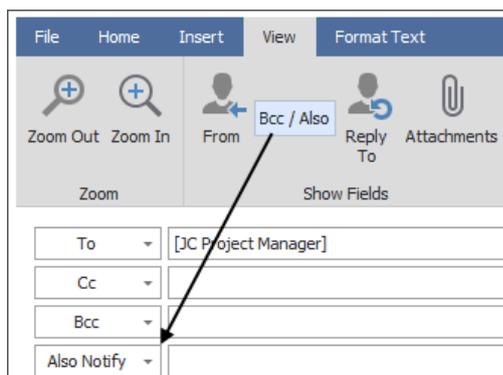


Now, when someone is sent an email from a Task with a "Reply To" email address, clicking "Reply" on the email will prefill with the address specified above.

## Also Notify

When sending each recipient a Notification list or attached spreadsheet of [only their information](#), one master list of all information can be sent to someone like a manager or an executive. This is done by specifying that person in the "Also Notify" section.

To specify an "Also Notify" recipient, go to the Email Step of Task Setup. Next, click on the View tab of the ribbon and click "Bcc / Also". Type an email address in the "Also Notify" line that appears.



Now, when each recipient in the Email Directory is sent a list or attached spreadsheet of only their information, the "Also Notify" recipient(s) will receive all the information for all recipients in one message.

# Saving Copies of Emailed Attachments

Many companies like to keep copies of the reports and documents sent with MyAssistant. MyAssistant 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:

Report Options for PR Employee Pay Statement with Time Off - (Current file) 09302022.rpt

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:  Use Sage value in name...

File type:

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.

Period End Date  
Use:  Record:  Column:

Employee ID  
Use:  Record:  Column:

**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

**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:

1. The location needs to be accessible from the MyAssistant Server using what's called a UNC path
2. 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.

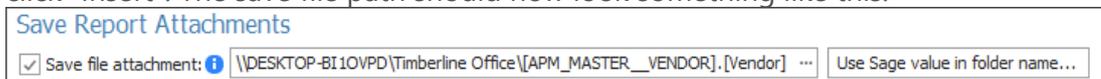
**Attachment Name:** This is what the name of the attachment will be once it's saved to a location on disk

**Tip:** Add a Sage field or MyAssistant formula (for example: "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"
3. Click "Email" on the left side of the window that opens
4. Double-click on your report design in the "Attachments" section under the Subject line
5. Check the box for "Save file attachment" (or confirm it's already checked) at the bottom of the window that opens
6. Select or confirm the current path where reports are currently being saved
7. Place your cursor at the end of the file path and press the "\" key on your keyboard
8. Click [Use Sage value in folder name...]
9. 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:



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

# "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

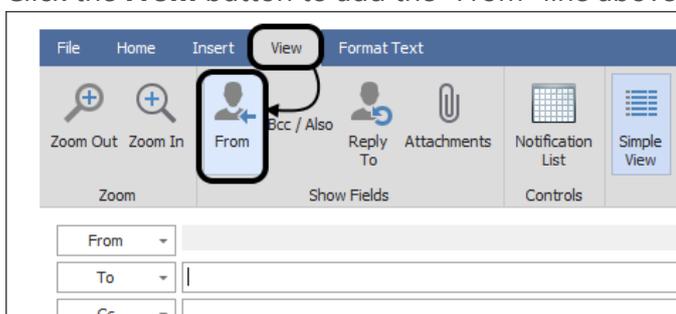
**Setting up MyAssistant to use multiple emails:** Part of the initial setup of MyAssistant is to determine what email address(es) MyAssistant will use to send emails. If MyAssistant was not initially set up to use multiple "From" email addresses, this can be updated in the [Server Settings](#) step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

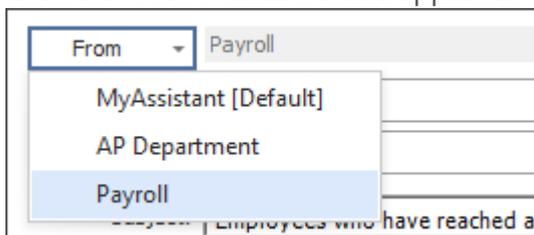
**NOTE:** If no "From" email address is specified in the Email Step of Task Setup, MyAssistant will use whichever email address is specified as the "Default". Changing which "From" email address is the default can also be done in the [Server Settings](#) step in the MyAssistant Designer's Options.

## 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

# Send Once Per

Sometimes information that is normally sent in one email, report or spreadsheet is easier to understand and work with when it's broken up into pieces. Another potential reason is that different parts of the information someone receives needs to be shared with different people. Common versions of these requests include Project Managers wanting separate reports for each of their Jobs, instead of one report with all of their Jobs included.

MyAssistant is able to generate and send information normally in one email in separate messages to the same recipient(s) as the one email. When this feature is used, MyAssistant sends recipients a separate email for each unique value in the Sage field or MyAssistant formula selected. This can be used whether a Task is sending emails to a set list of [recipients](#), or if it's sending [each person only their information](#).

To use the **Send Once Per** function:

- Select the desired Task from the main MyAssistant window and click "Open"
- Navigate to the [Task Options](#) step of Task Setup
- Check the box next to "Separate email for each"
- Choose the Sage field or MyAssistant formula to use to create separate emails from the dropdown
- Click "OK" to close Task Setup

To turn off the **Send Once Per** function:

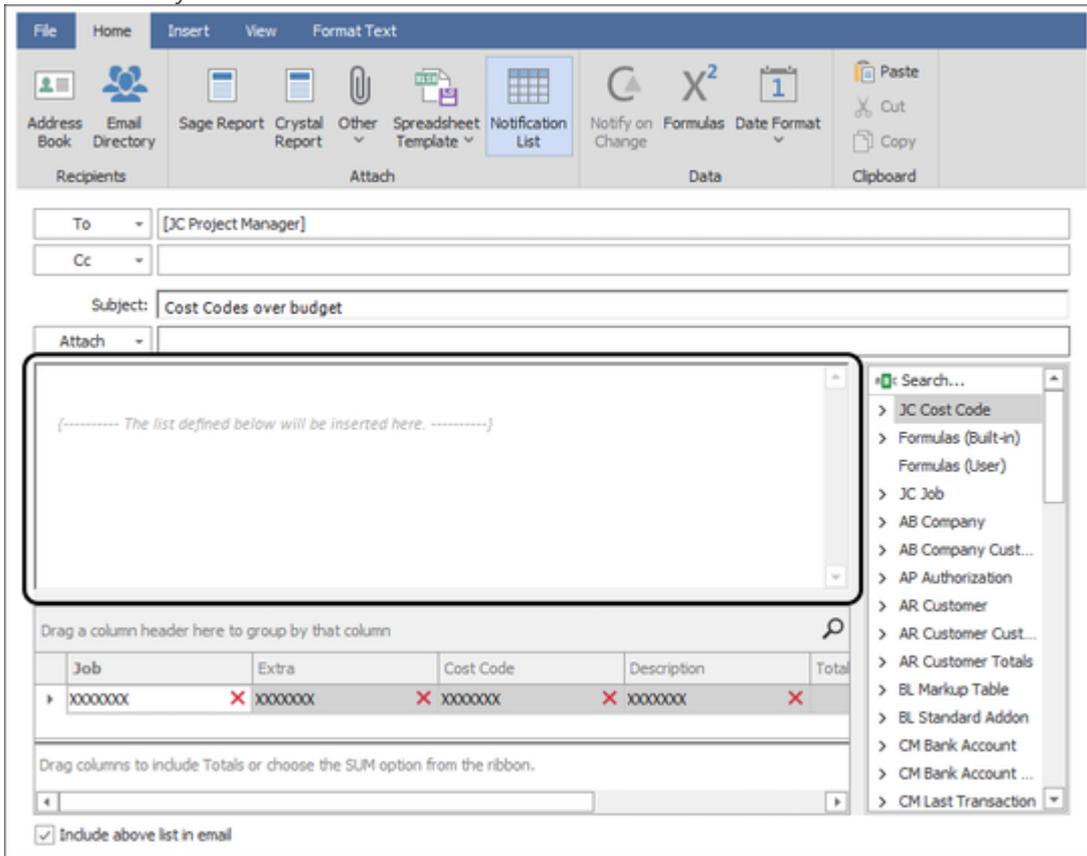
- Select the desired Task from the main MyAssistant window and click "Open"
- Navigate to the [Task Options](#) step of Task Setup
- Click the eraser icon to the right of dropdown where the Sage field or MyAssistant formula was selected
- Click "OK" to close Task Setup

## Using "Send Once Per" with Attached Reports

When using "Send Once Per" on a Task with one or more attached [Sage or Crystal Reports](#), the attached report(s) should have a prompt for the same Sage field or MyAssistant formula selected. This way, the report(s) attached to the emails sent will not contain the exact same information.

# Message Section

The middle section of the Email step is where messages can be written to be included in emails sent by the Task.



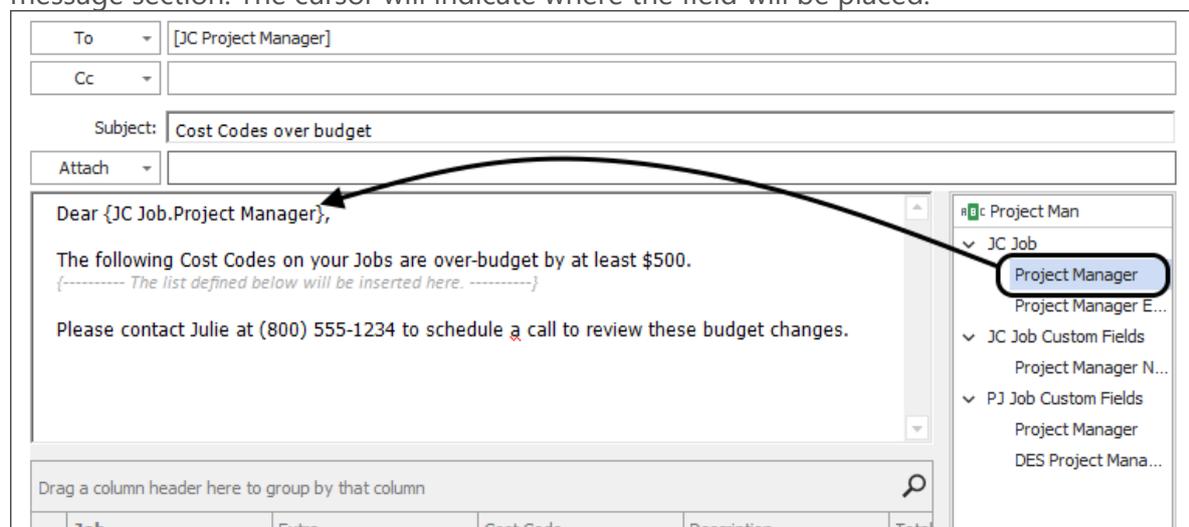
When sending a list in the body of the email, the position of the list in the email will be indicated by gray text that reads "The list defined below will be inserted here". Any text typed above the gray text will appear above the list in the body of the email, and any text below it will appear below the list.

To exclude the list from being included in the email, select and delete the gray text in the message or uncheck the "Include above list in email" checkbox at the bottom of the window.

## Using Sage Information in the Message

Sage fields can be added to the message of the Task in order to personalize messages sent to recipients. This is useful when sending each recipient only their information.

To add a field to the message, click and drag a field from the Sage Field List into the message section. The cursor will indicate where the field will be placed.



The screenshot shows an email composition window. The 'To' field contains '[JC Project Manager]'. The 'Subject' field contains 'Cost Codes over budget'. The message body contains the following text: 'Dear {JC Job.Project Manager},', 'The following Cost Codes on your Jobs are over-budget by at least \$500.', '{----- The list defined below will be inserted here. -----}', and 'Please contact Julie at (800) 555-1234 to schedule a call to review these budget changes.' A 'Sage Field List' is open on the right side, showing a tree structure with 'Project Manager' selected and highlighted. An arrow points from the 'Project Manager' field in the list to the '{JC Job.Project Manager}' placeholder in the message body. Below the message body is a table with columns: Job, Extra, Cost Code, Description, Total.

## Task Options Step

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 entered in Sage.

For example: The first time a Task looking at all JC Jobs is run, 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"**

Sends information normally in one email in separate messages. When this feature is used, MyAssistant sends recipients a separate email for each unique value in the Sage field or MyAssistant formula selected.

To implement, click the dropdown and select the Sage field or formula to use for creating 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 should have a prompt for the same Sage field or MyAssistant formula selected. This way the attached report on each email will not contain the exact same information.

[Click here](#) for more information on Send Once Per.

### **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 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 (for example: 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.

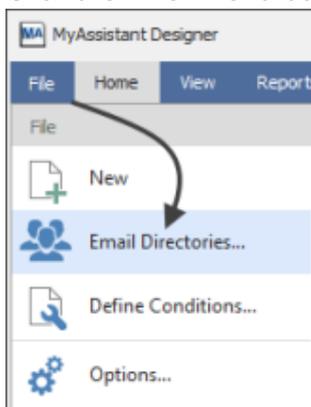
## How to create an Email Directory

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. Click the "File" menu button and select "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"

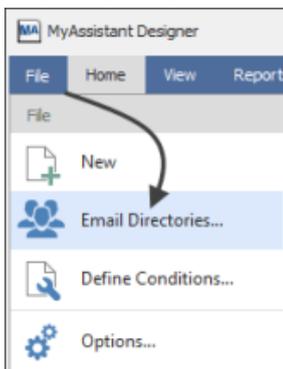
6. Select the Sage 300 CRE data record where the email address will be entered
7. Select the field on the selected Sage 300 CRE record where email addresses will be entered

[Click here](#) for a table that helps identify what record information is stored in based on where it's viewed or entered in Sage.

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. Click the "File" menu button and select "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"

Enter a name for the Directory and select the method for looking up email addresses.

Directory name:

Lookup Email addresses in Sage 300 CRE  
 Email addresses can be looked up in Sage 300 CRE. For example, lookup customer Email addresses from the Email Address field in customer setup.

Lookup Email addresses in a list that you provide  
 Email addresses can be associated with a value in Sage 300 CRE. For example, email addresses can be entered for Project Manager names in Job Cost.

6. Select the Sage 300 CRE data record that will be used to look up email addresses
  - a. [Click here](#) for a table that helps identify what record information is stored in based on where it's viewed or entered in Sage.
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

Select a Sage 300 CRE database field where Email addresses are stored. ?

Sage 300 CRE database record:

Sage 300 CRE database field:

	Estimator	Email Address
	John Erickson	john@company.com
...	Steve Johnson	steve@company.com

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.

# Attachments

## Attached Reports

A popular use of MyAssistant is automating the generation and sending of reports. Instead of having to manually run a report off a Sage Reports menu, print it and then distribute it to those who need it; a MyAssistant Task can automatically generate the desired report(s) and send them to the necessary recipients. Common examples include automatically generating and sending AR Aging reports, as well as creating and sending Employees their pay stubs every pay period.

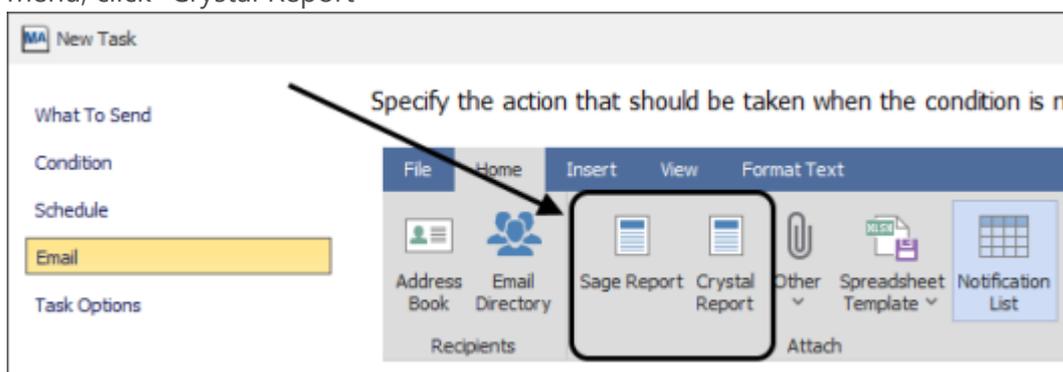
While [other documents](#) and [spreadsheets](#) can be attached to a MyAssistant Task, two different kinds of reports can be attached:

**Sage Reports:** Reports that have been added to the "Reports" menu in a Sage 300 application, and have been created with Sage 300's Report Designer or Crystal Reports. Almost any report that is on a Sage Reports menu that meets the above criteria can be attached to a MyAssistant Task.

**Crystal Reports:** Reports created in the Crystal Reports software and designed to report on Sage 300 information can be directly attached to a MyAssistant Task.

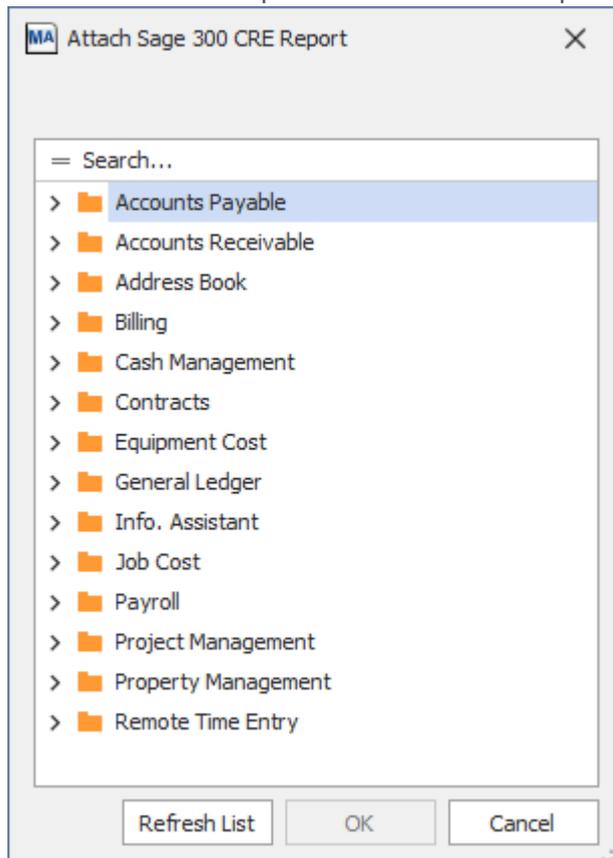
### To attach a report to a Task

1. Open or create the MyAssistant Task that will have the report attached
2. Progress to the Email step of Task Setup
3. Attach the (first) desired report using the corresponding button
  - a. If the report is already on a Reports menu in a Sage program, click "Sage Report"
  - b. If the report was created in Crystal Reports software and is not on a Sage Reports menu, click "Crystal Report"



4. Navigate to and select the desired report

5. If "Sage Report" was clicked: a window will open that will list all available reports that can be added from Sage, grouped by application. Expand the groupings or use the search bar at the top to find the desired report and click "OK"



6. If "Crystal Report" was clicked: a File Explorer window will open -- navigate to and select the Crystal Report that should be attached to the Task, then click "Open"

After selecting which report should be attached to the Task, the [Report Options](#) window will open.

# Report Options

Sage or Crystal Reports on MyAssistant Tasks have a number of potential settings and options to set after they're attached. These settings control information like what information will be used in the report's prompts, what kind of file will be attached to an email, what the name of the attachment will be, and more.

**Report Options for PR Employee Pay Statement with Time Off - (Current file) 09302022.rpt**

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:

File type:

Protect PDF with 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.

Period End Date

Use:  Record:  Column:

Employee ID

Use:  Record:  Column:

**Save Report Attachments**

Save file attachment:

Use SQL report data connection

Embed report as the body of the email

The **Report Options** window contains the following settings & options:

**Attachment Name:** The name of the file(s) attached to the email(s) sent from MyAssistant.

The values from Sage fields and MyAssistant formulas can be added to the Attachment Name to create personalized attachment names by recipient. This is done by clicking "Use Sage value in name..." and selecting the Sage field or MyAssistant formula to put in the Attachment Name. Examples include adding an employee's name or the period end date on a PR Check to the name of the pay stub employees are sent every week.

**File Type:** What kind of file the attachment(s) on the email(s) will be. If attaching a Sage report to a Task, the only option is PDF.

Crystal Reports attached to MyAssistant Tasks can produce one of the following file types:

- PDF
- Excel Workbook
- Plain Text
- Comma-Separated Values (CSV)

**Protect PDF with Password:** If the File Type is set to "PDF", a password can be set that's required for opening the attachment. To set a unique password for each recipient, use the value from a Sage field or MyAssistant Formula by clicking "Use Sage value for password..."

**Report Parameters:** These are the prompts (if any) that are used to filter the content of the attached report. These prompts match the prompts seen when running the report from the Sage menu.

Report parameters can be filled out with one of three possibilities:

- **Value:** A set string of text, date or number (depending on the prompt) that does not change regardless of time or who the recipient is.
- **Sage Field:** The value(s) from a specified Sage field that will be used to fill out the prompt. Selecting this option also requires specifying the Sage record and Sage field used to fill out the prompt. This option is used when [sending each recipient only their reports or documents](#). Examples of using a Sage field to fill out a prompt include using the Employee ID off a PR Check to filter a pay stub to only that Employee. [Click here](#) for a table that helps identify what record information is stored in based on where it's viewed or entered in Sage.
- **Formula:** [MyAssistant Formulas](#) are advanced ways to look up, calculate or summarize information in Sage. Selecting this option requires specifying the MyAssistant Formula used to fill out the prompt. The list of formulas will automatically filter based on the if the prompt is requiring a date, a number, or text. Examples include using a formula to find the last day of last month to use in the "Cutoff date" prompt for a JC Cost report.

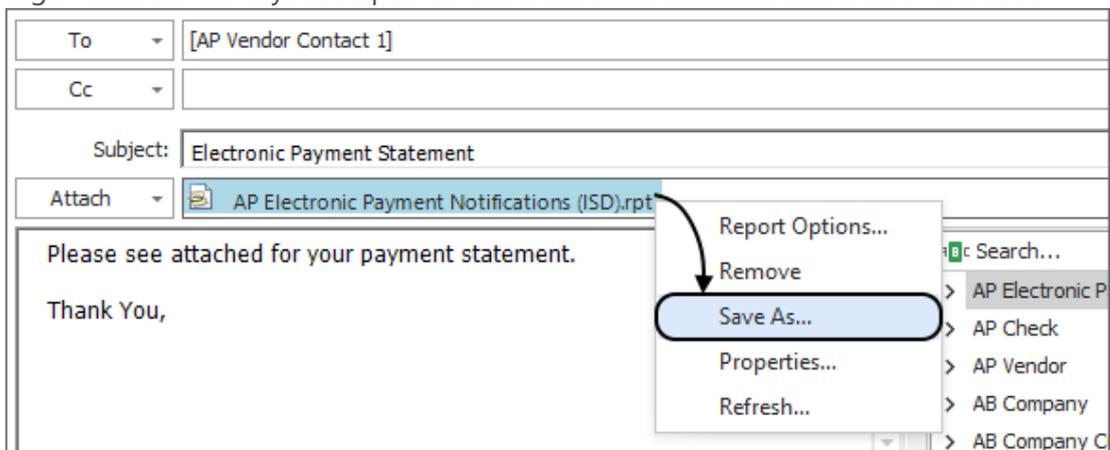
**Save Report Attachments:** MyAssistant can save a copy of an attached report to a location on a server. For more information on saving copies of emailed attachments, [click here](#).

# Save As

Sometimes a change needs to be made to a Crystal Report attached to a Task, but the original report cannot be located. The original report may not be at the path in the [Report Properties](#), or there are multiple versions of the report with similar names. To ensure that the report currently attached to the Task gets modified, MyAssistant has the ability to save a copy of the Crystal Report attached to the Task to a location on disk.

## To save a Crystal Report attached to a Task

1. Select the MyAssistant Task with the attached report in the main MyAssistant window
2. Click "Open" in the button bar to open the Task
3. Click "Email" on the left side of the window that opens to go to the Email Step
4. Right-click on the Crystal Report in the attachments section and select "Save As..."



5. Navigate to where the report should be saved, then "Save"
6. Click "OK" to close the Task

After the saved report has been updated, it can be re-attached to the Task using the [Refresh Report](#) feature.

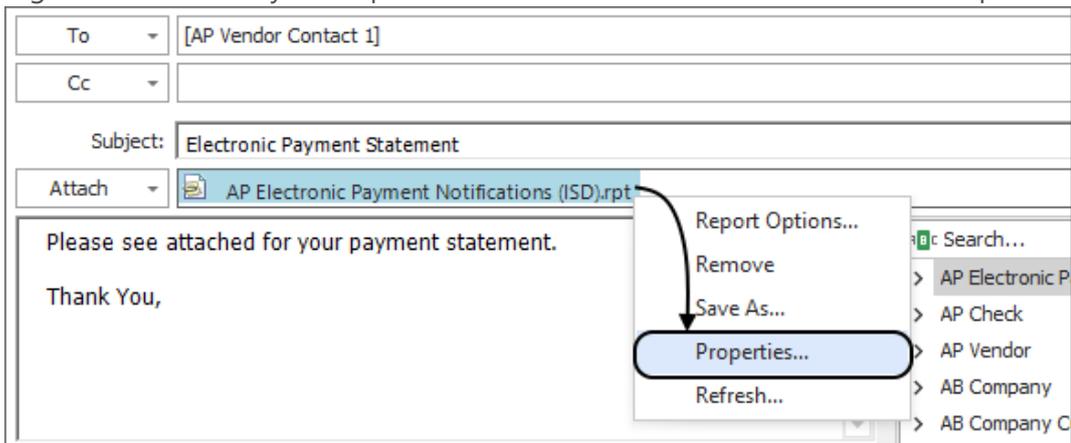
# Report Properties

When a report is attached to a Task, additional information about the report is stored in the **Report Properties**. This information is useful when trying to track down the original location a Crystal Report was added from, the date a Sage report was attached to the Task, the size of the attached report, and more.

## To view an attached report's properties:

Select the MyAssistant Task with the attached report in the main MyAssistant window

1. Click "Open" in the button bar to open the Task
2. Click "Email" on the left side of the window that opens to go to the Email Step
3. Right-click on the Crystal Report in the attachments section and select "Properties..."



If the report was attached with the "Crystal Report" option, the following information appears:

**Report Name:** The name of the file

**File Type:** "Crystal Report"

**Source File Path:** The path where the report was attached from (if found)

**Size:** The size of the file on disk

**Date Attached:** When the report was attached to the Task (if found)

**File Last Modified:** The last time the source report was modified (if found)

If the report was attached from a Sage reports menu, the following information appears:

**Report Name:** The name of the report on the Sage Reports menu

**File Type:** "Sage report"

**Sage Application:** Which Sage 300 application has the report on its Reports menu

**Date Attached:** When the report was attached to the Task

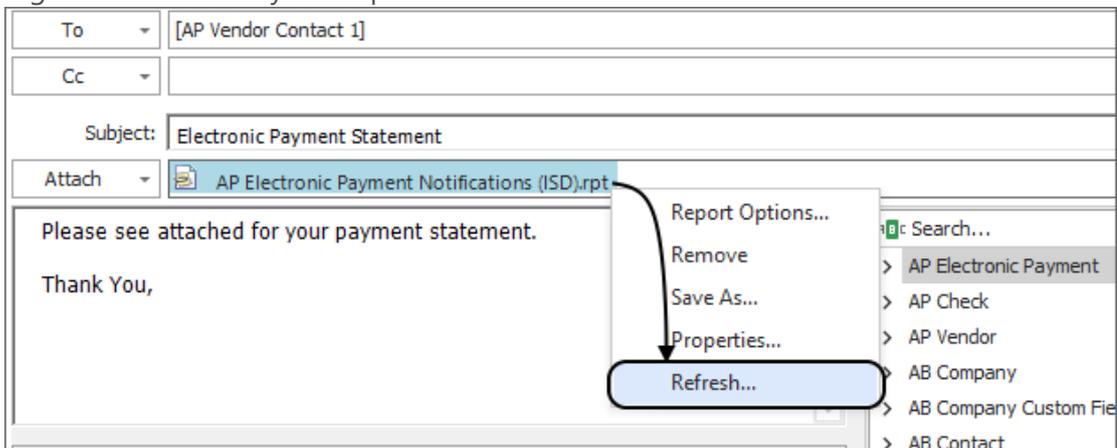
# Refresh Report

Crystal Reports added to a Task are stored in MyAssistant's database, so they have to be replaced on the Task to reflect any report changes. Instead removing the old report, re-attaching it and re-filling out the prompts and report options, MyAssistant features the ability to "refresh" the attached report.

Refreshing an attached report replaces the original report with a selected new one; while attempting to use the original's options and prompts. If the "refreshed" report has different prompts compared to the original report, the Report Options window opens so the prompts can be updated. If the new report has the same prompts as the original, the Report Options window will not open. In either case, the name of the report in the Attachments section of the Email step will update to the name of the new report (if different).

## To refresh a Crystal Report attached to a Task

1. Select the MyAssistant Task with the attached report in the main MyAssistant window
2. Click "Open" in the button bar to open the Task
3. Click "Email" on the left side of the window that opens to go to the Email Step
4. Right-click on the Crystal Report in the attachments section and select "Refresh..."



5. Navigate to and select the updated Crystal Report, then click "Open"
6. (If the prompts are different) Fill out the prompts in the Report Options window that opens, then click "OK"
7. Click "OK" to close the Task

# Other Attachments

Often times companies need to distribute attachments that aren't [spreadsheets](#) or [attached reports](#). Examples include distributing blank forms that need to be filled out by employees, samples of documents insurance certificates that Subcontractors need to send to management, or sending out monthly company newsletters. These kinds of attachments can also be automatically sent with MyAssistant.

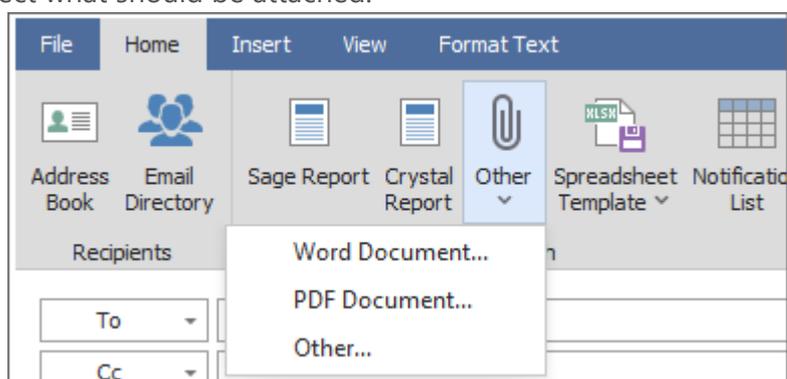
## To send non-report attachments with MyAssistant:

Create or open the MyAssistant Task that will send the attachment

Progress to the Email step of Task Setup

Click "Other" in the ribbon

Select what should be attached:



- a. **Word Document:** A document created in Microsoft Word
- b. **PDF Document:** An existing, accessible PDF
- c. **Other:** Any other kind file that can be accessed and attached

Navigate to and select the desired attachment in the Window that opens

Finish/Close the Task Setup

**Important:** Any file or document attached to a MyAssistant Task using one of the above options will be sent as is, and contain the same information for all recipients. If needing to create and send reports or documents where each person gets only their information, [click here](#)

# Spreadsheet Templates

This reference section provides detailed explanations on the components of MyAssistant Spreadsheet Templates and the steps for various advanced actions that can be performed (for example: multiple groupings, subtotals & totals, spreadsheet formulas, and more).

Spreadsheet Templates have the following parts:

**Spreadsheet Cells:** The content of each cell can be a Sage field, MyAssistant Formula or Excel formula. They determine what Sage information is filled in on the spreadsheet.

**Repeat Section:** Sets what information will be repeated for each record (for example: AP Vendor) found by the Task Condition

Related: Repeat Section

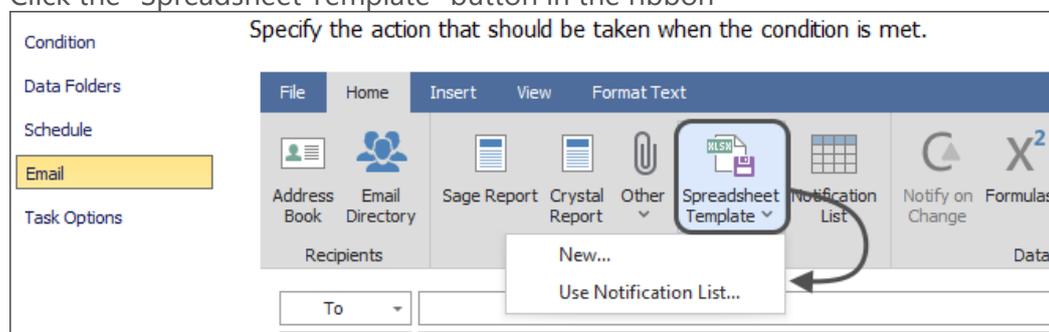
**Sort:** Controls the order records (for example: Jobs, Vendors, etc.) are listed in the spreadsheet, and also determines what Sage fields you can group by.

**Group Headers & Footers:** A section that will appear at the top or bottom of a group of information. For example, you can group Cost Codes by Job and have an overline (Group Header) with the Job Name, and then have a section that subtotals amounts by Job (Group Footer).

**Document Headers & Footers:** Appear once at the beginning or end of the spreadsheet. Document Headers are often used for information like column headings and spreadsheet titles, while Document Footers are used for things like grand totals.

## How to add a Spreadsheet Template to a Task

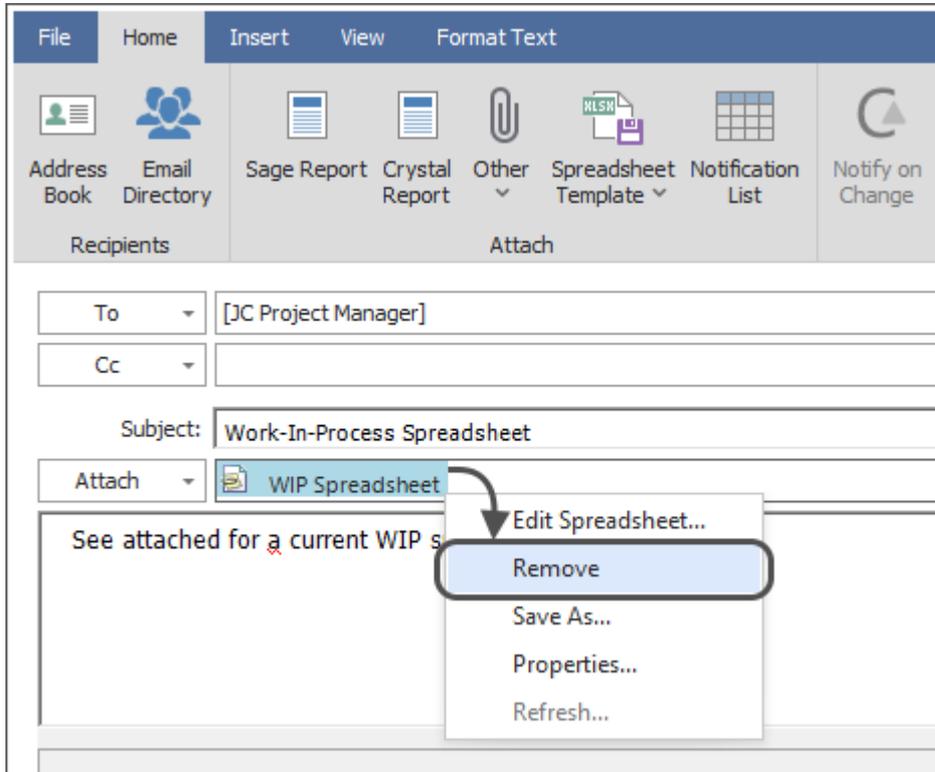
1. Open a prebuilt or create a new Task and advance to the Email step of Task Setup
2. Click the "Spreadsheet Template" button in the ribbon



3. Choose how the template should be created:
  - Choose "New" to start with a blank or [prebuilt Spreadsheet Template](#)
  - Choose "[Use Notification List](#)" to use the list of Notifications at the bottom of the Email step to create a template

### How to add a Spreadsheet Template to a Task

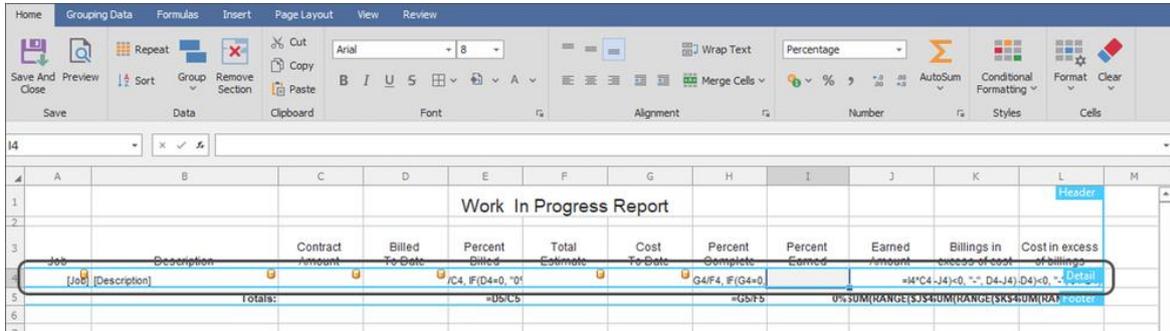
1. Open a Task with a template attached and advance to the Email step of Task Setup
2. Right click on the Spreadsheet Template in the "Attachments" section under the Subject line
3. Select "Remove"



**Note:** Only one MyAssistant Spreadsheet Template can be attached to a Task at a time. Each recipient on a Task can be sent a spreadsheet with only their information, but every spreadsheet will use the same Spreadsheet Template.

# Repeat Section

The Repeat Section of a Spreadsheet Template controls what information is repeated for each Sage record found by the Task Condition. The Repeat Section can be identified by the blue box and the "Detail" label:

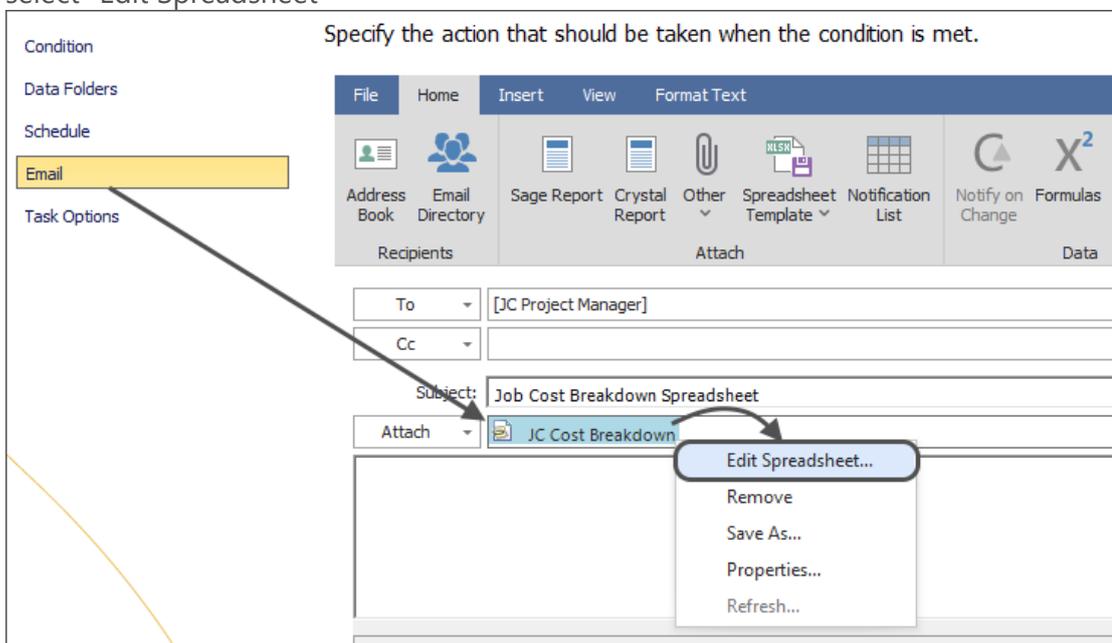


Information must be inside the repeat section to be repeated for every record found by the Task Condition.

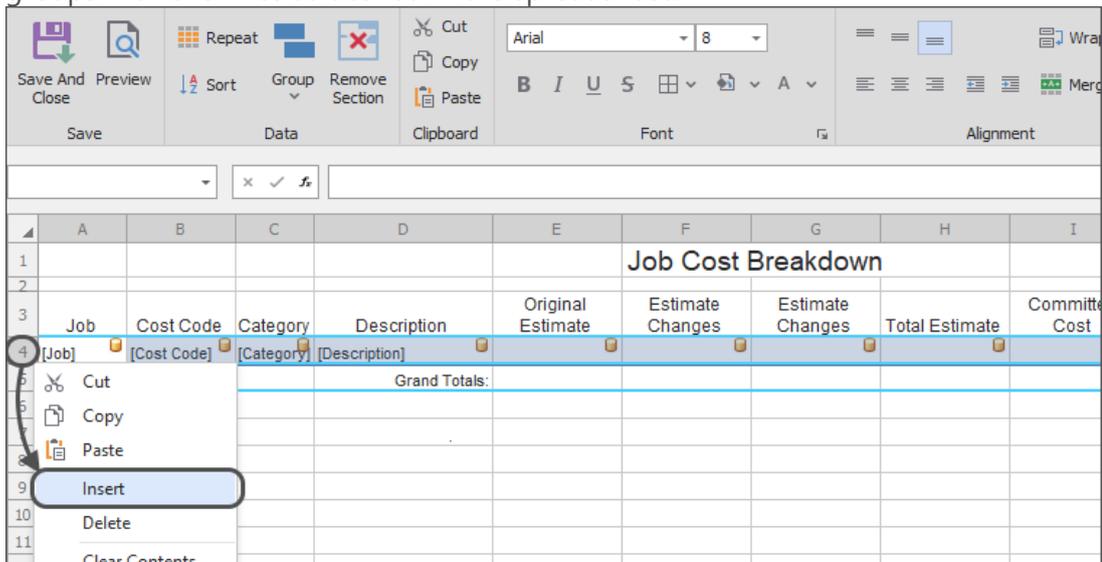
**Tip:** Include blank rows in the Repeat Section (above and below the row with Sage information) if information will be grouped in the spreadsheet. Any [group headers/footers](#) in the spreadsheet template are added inside the Repeat section

To set or change a Repeat Section on a Spreadsheet Template:

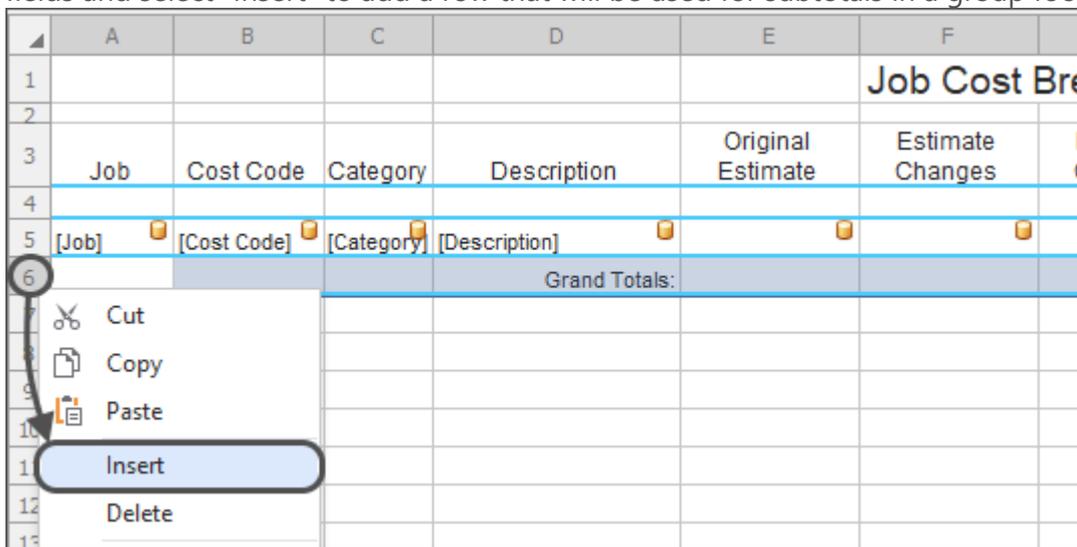
1. **Open the MyAssistant Task:** Select the Task sending a spreadsheet, then click the "Open" button in the ribbon
2. **Open the Spreadsheet Template:** Click "Email" on the left side of the step that opens, then right-click on the spreadsheet template in the "Attachments" section and select "Edit Spreadsheet"



- 3. Insert row(s) for overline(s):** Right-click on the row with the Sage fields and select "Insert" to add an overline that will be used for a group header. Repeat for as many groups with overlines as desired in the spreadsheet.

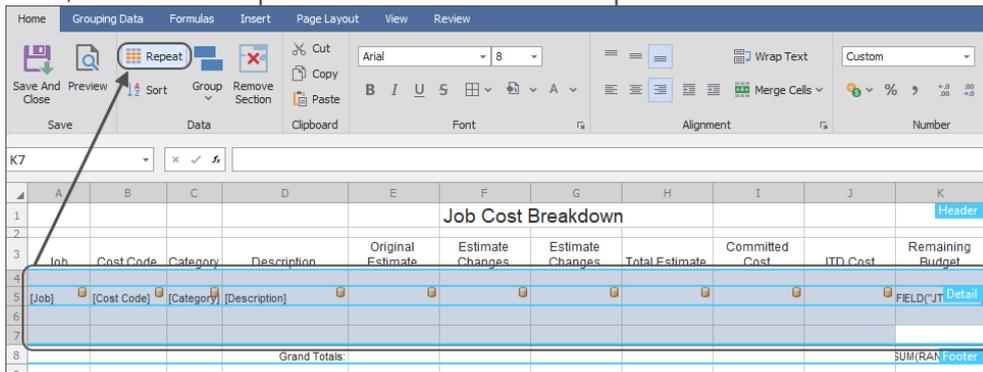


- 4. Insert row(s) for subtotals:** Right-click on the row below the row with the Sage fields and select "Insert" to add a row that will be used for subtotals in a group footer.



**Tip:** Add two rows to the bottom of a Repeat Section for each Group Footer that will be eventually added. When setting a group footer that will include subtotals, the final spreadsheet will include a blank row that separates the groups and makes it easier to read

5. **Re-set the Repeat Section:** Click and highlight the cells the original and all inserted rows, then click "Repeat" to re-establish the Repeat section.



**Note:** Re-sizing a Repeat Section using the above steps preserves the Sort order of the spreadsheet (if previously set).

After the Repeat Section is established, the **Sort** will set the order information appears in the spreadsheet; as well as what groupings can be set in the spreadsheet template

## Sort

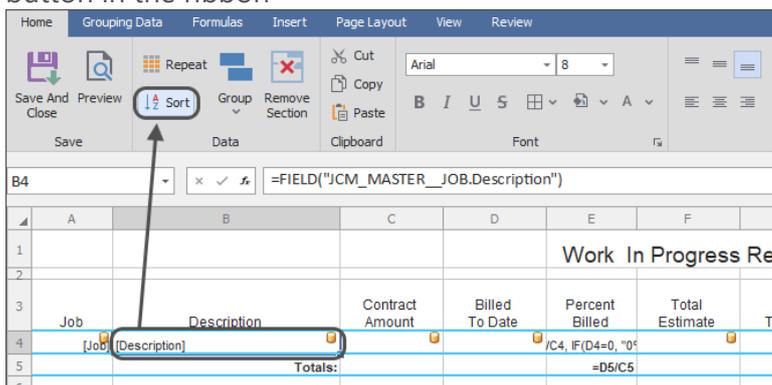
The Sort on a Spreadsheet Template controls the order Sage information (for example: Jobs, Vendors, etc.) is listed in the spreadsheet, as well as how information can be grouped.

A Sort order can only be specified on a spreadsheet template *after* a **Repeat Section** has been added to a Spreadsheet Template.

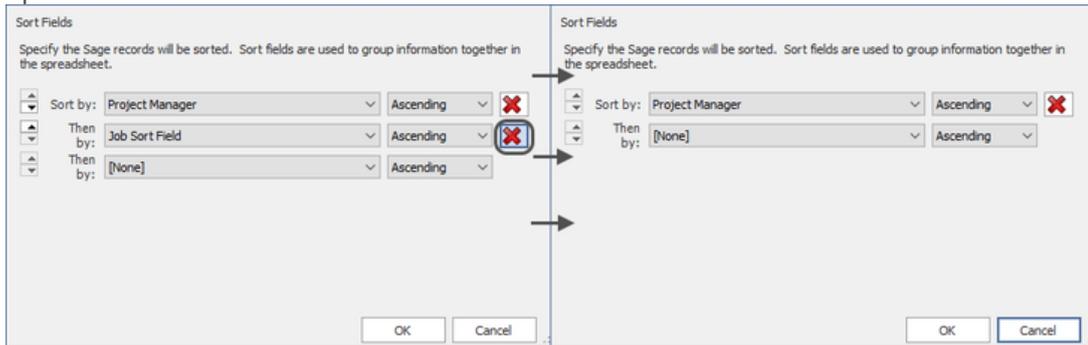
The dropdown list of available fields to sort a spreadsheet template will always prefill with the Sage fields that have already been added to a Spreadsheet Template. Sage fields not in the spreadsheet template can be used by selecting "More Fields..." at the bottom of the dropdown.

This outlines the steps to update the Sort of a spreadsheet Template. Depending on the spreadsheet(s) being sent by the Task, some steps may be skipped. These steps begin after opening the Spreadsheet Template in the Email Step of Task Setup:

1. **Open the Sort window:** Click on a cell in the Repeat section, then click the Sort button in the ribbon

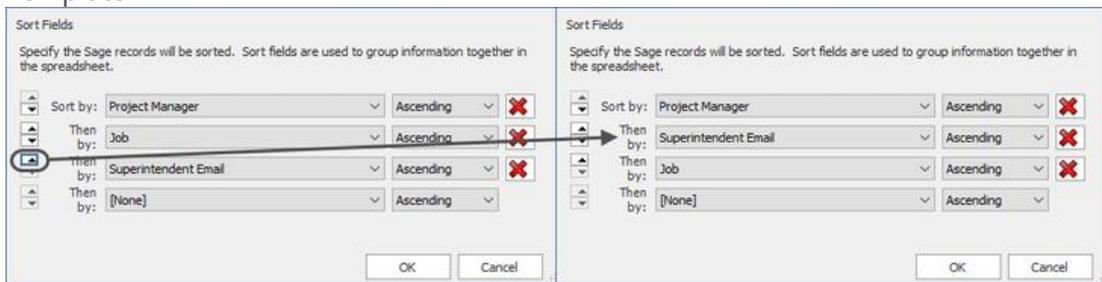


2. **Remove sorts:** Click the X to remove any fields or formulas being used to sort the Spreadsheet.



Removing a sort also removes any linked [Group Headers or Footers](#)

3. **Add new sort fields:** Click the "[None]" dropdown at the bottom of the list and select a field to add a new sort. Repeat with the new blank dropdown at the bottom of the list to add any further new sorts.
4. **Change the Sort order:** Use the up & down arrows and the "Ascending" & "Descending" options for each row to rearrange the Sort order of the Spreadsheet Template



5. Click "OK" when finished

**Note:** After changing the Sort order, any Group Headers & Group Footers already in the spreadsheet will automatically update based on the new Sort.

For example: If a spreadsheet of Subcontracts previously sorted & grouped by Project Manager and Job were changed to sort by Job and Vendor, the group headers and footers in the template would automatically update to group the spreadsheet by Job and Vendor.

# Grouping Data

Spreadsheet Templates can group information based on specified values (for example: grouping Cost Codes by Job number, AP Invoices by Vendor, etc.) using Group Headers and Footers.

Group Headers and Footers are placed in a Spreadsheet Template as complete rows at the top and bottom (respectively) of the Repeat Section.

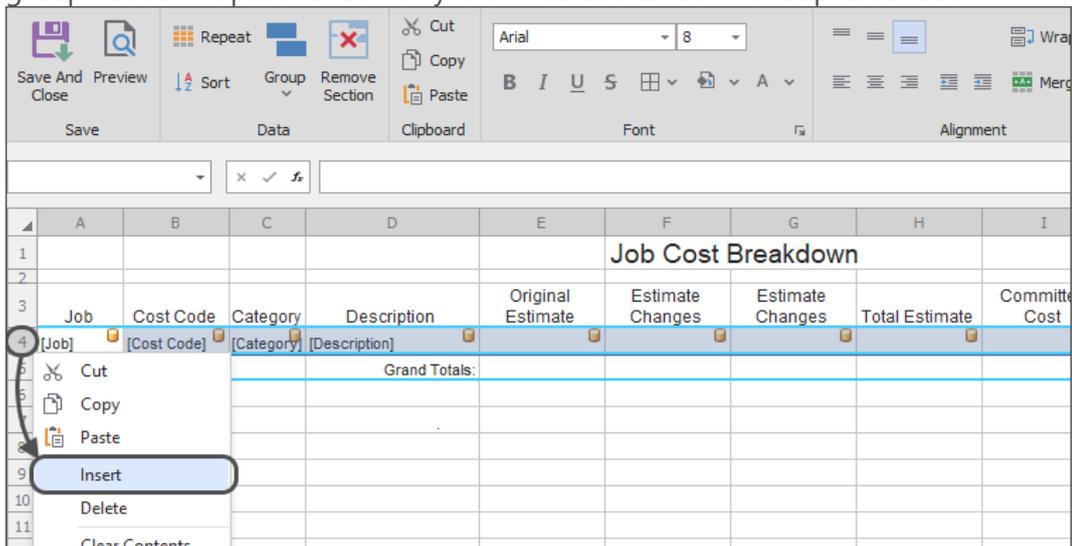
Spreadsheets can only be grouped by Sage fields or Formulas that have been added to the [Sort](#) of the spreadsheet.

## Add Group Headers

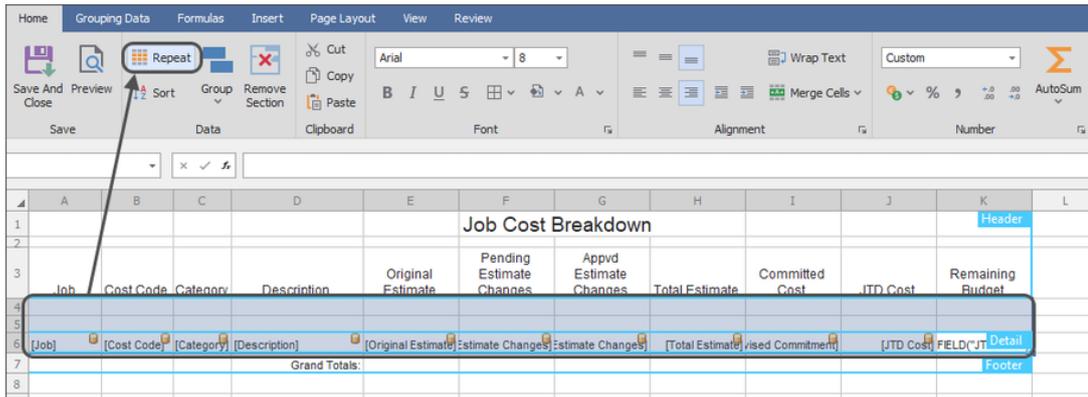
Group Headers appear at the top of a group of information in a spreadsheet as an overline that identifies the group of information to follow (for example: Cost Codes grouped by Job could have an overline over each Job's Cost Codes with the Job number and description. When grouping by multiple fields, sometimes multiple overlines are needed.

This outlines the steps to add one or more Group Headers to a Spreadsheet Template. Depending on the spreadsheet that will be sent, some steps may be be skipped. These steps begin after opening the Spreadsheet Template in the Email Step of Task Setup:

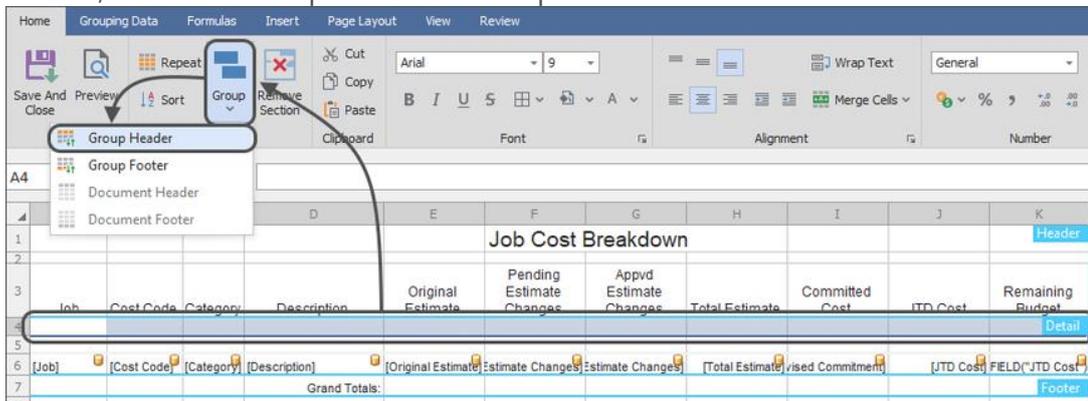
1. **Insert row(s) for the Group Header(s):** Right-click on the row in the Repeat Section with the Sage fields and select "Insert" -- this will add overline that will be used for a group header. Repeat for as many overlines as desired in the spreadsheet.



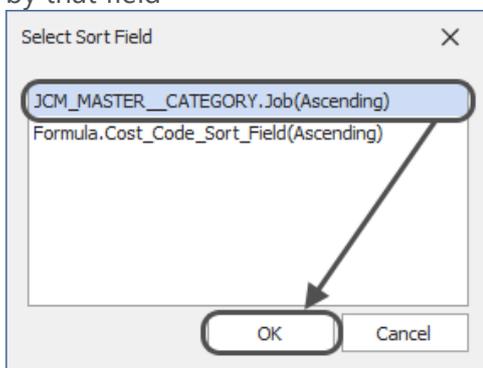
2. **Re-set the Repeat Section:** Update the Repeat Section to include the rows added. The Group Headers that will be added to the spreadsheet will be inside the Repeat Section.



3. **Set the first Group Header:** Select all the cells in the row at the top of the Repeat section, click then Group and select Group Header.

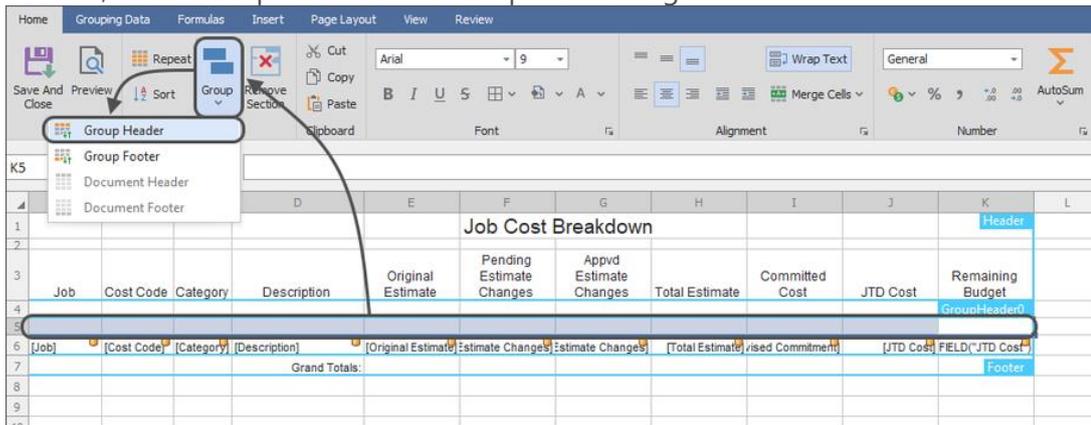


4. **Assign the first Group Header:** Choose the top field in the list of fields that opens, then click OK. This will set the overline and group the information in the spreadsheet by that field

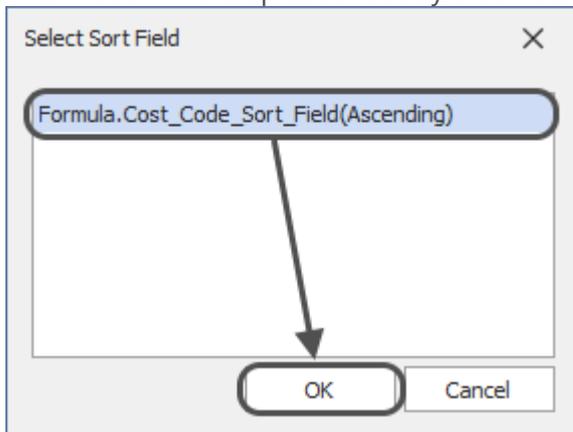


**Note:** Group headers must be added from top-to-bottom in the order they appear in the Sort, even though a spreadsheet does not have to include a group for every Sort. For example: If a spreadsheet of JC Categories was being sorted by Job, Extra and Cost Code; the spreadsheet could be grouped by Job, then Cost Code -- but not by Cost Code, then Job.

5. **Set the second Group Header(s):** Select the next row at the top of the Repeat Section, click "Group" and select "Group Header" again



6. **Assign the second Group Header:** Choose the next field in the list of fields that opens, then click OK. This will set the second overline under the first and group the information in the spreadsheet by that field



7. **Add information to the Group Headers:** Add the Sage fields and other information that should be displayed at the top of each group to the spreadsheet.

Repeat the above steps as desired for as many Group Headers that should be included in the Spreadsheet Template.

### Add Group Footers

Group Footers appear as a row (or rows) at the bottom of a group of information in a spreadsheet to denote the end of the group (for example: Cost Codes grouped by Job could have line at the bottom of group before the start of the next Job's Cost Codes). When grouping by multiple fields, sometimes multiple footers are needed (especially when including multiple [subtotals](#)).

This outlines the steps to add one or more Group Footers to a Spreadsheet Template. Depending on the spreadsheet that will be sent, some steps may be skipped. These steps begin after opening the Spreadsheet Template in the Email Step of Task Setup:

- 1. Insert row(s) for the Group Footer(s):** Right-click on the row below the row in the Repeat Section with the Sage fields and select "Insert" -- this will add a row that will be used for a group footer. Repeat for as many group footers as desired in the spreadsheet.

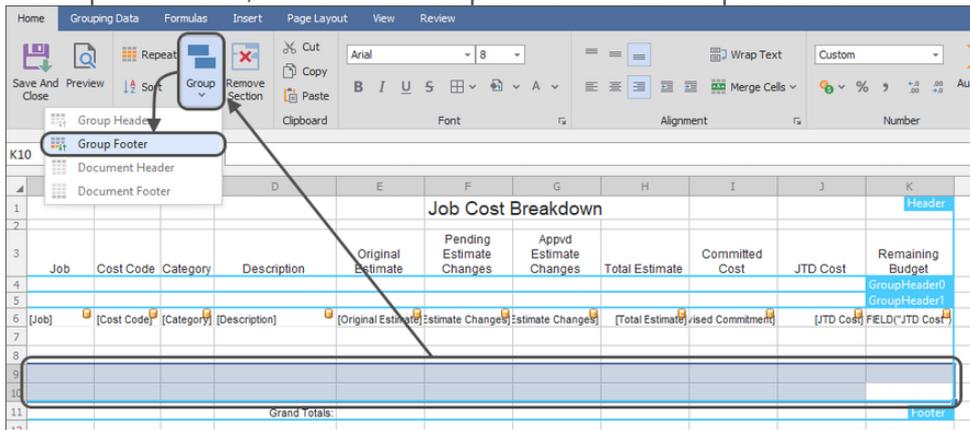
	A	B	C	D	E	F	G	H	I
1						<b>Job Cost Breakdown</b>			
2									
3									
4									
5									
6	[Job]	[Cost Code]	[Category]	[Description]	[Original Estimate]	Estimate Changes	Estimate Changes	[Total Estimate]	Used Co
7	Grand Totals:								

**Tip:** If adding subtotals to a spreadsheet, insert two rows for each group footer. This will allow for a row with the group subtotals, then still include a blank row to separate the groups.

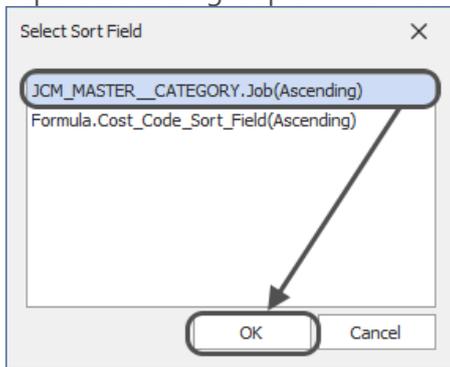
- 2. Resize the Repeat section:** Expand the Repeat section for including Group Footers by clicking & selecting the entire Repeat section, plus the blank rows under the Repeat section. Click the "Repeat" button in the ribbon to resize the Repeat section

	A	B	C	D	E	F	G	H	I	J	K
1											Header
2											
3											
4											GroupHeader0
5											GroupHeader1
6	[Job]	[Cost Code]	[Category]	[Description]	[Original Estimate]	Estimate Changes	Estimate Changes	[Total Estimate]	Used Commitment	[JTD Cost]	FIELD("JTD Cost")
7											
8											
9											
10											
11											Footer
12											

- Set the first Group Footer:** Select the cells in the bottom two row at the bottom of the Repeat section, then click "Group" and select "Group Footer".

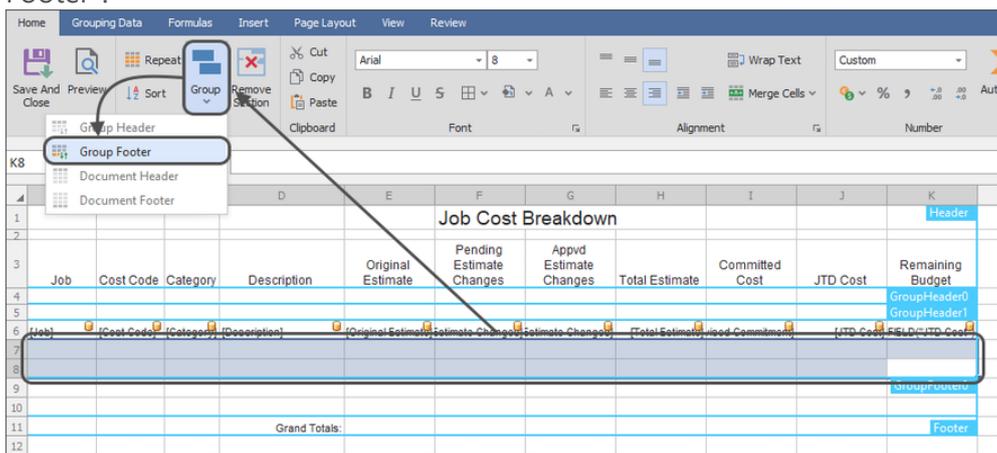


- Assign the first Group Footer:** Choose the same field that was selected for the topmost Group Header in the template, then click "OK". This will set the section that separates each group of information from the next

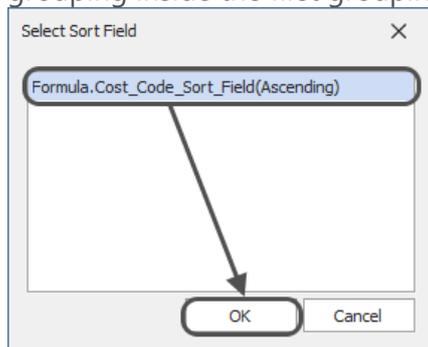


**Note:** Group Footers must be added from bottom-to-top, mirroring the order of the Group Headers in the spreadsheet. For example: If a spreadsheet of JC Categories was being sorted by Job, Extra and Cost Code; the lowest Group Footer would be Job, then Extra (if grouped by it), then Cost Code.

- Set the next Group Footer:** Select the next row(s) of cells at the bottom of the Repeat Section (above the first Group Footer), then click "Group" and select "Group Footer".



- Assign the next Group Footer:** Choose the same field that was selected for the second Group Header in the template, then click "OK". This will set the second grouping inside the first grouping



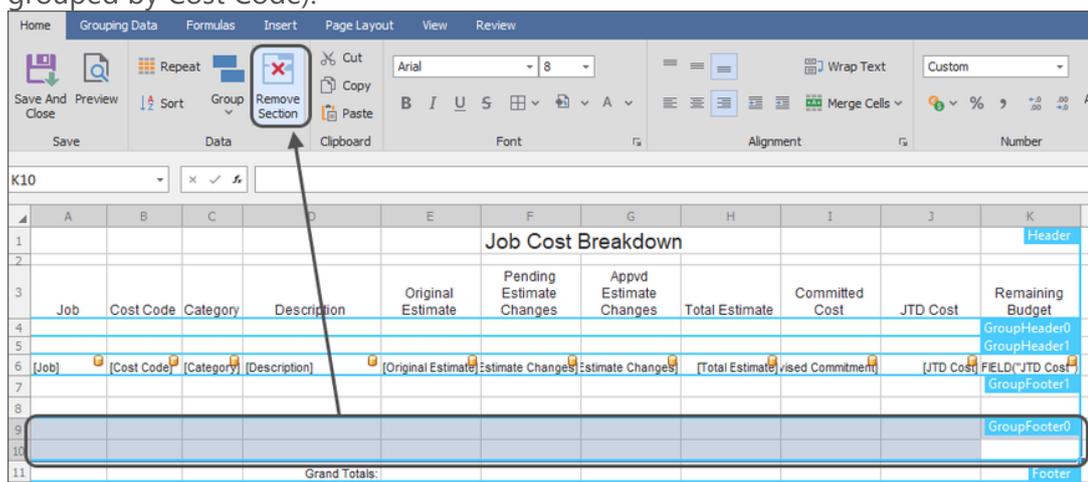
- Add information to the Group Footers:** Add information like **Totals** that should be displayed at the top of each group to the spreadsheet.

Repeat the above steps as desired for as many Group Footers that should be included in the Spreadsheet Template.

### Remove a Group Header or Footer

Sometimes a spreadsheet contains more group headers or footers than desired. This outlines the steps to remove a Group Header or Footer from a Spreadsheet Template. These steps begin after opening the Spreadsheet Template in the Email Step of Task Setup:

- Select the Group Header or Footer:** Click and drag to highlight all the cells in the Group Header or Footer that needs to be removed
- Remove the Header or Footer:** Click the "Remove Section" button to remove the Header or Footer. If a spreadsheet has neither a Group Header or Footer for a specific Sage field, the spreadsheet will no longer be grouped by that field (for example: If a spreadsheet of Categories being grouped by Job and Cost Code has the "Cost Code" Group Header and Group Footer removed, the spreadsheet will no longer be grouped by Cost Code).



3. **Remove the extra row(s):** Right-click on the row heading that previously held the Group Header or Footer and select "Delete" -- this will remove an extra row from being repeated for every item in the spreadsheet. Repeat as needed for additional rows removed

	A	B	C	D	E	F	G	H	
1	Job Cost Breakdown								
2									
3	Job	Cost Code	Category	Description	Original Estimate	Pending Estimate Changes	Appvd Estimate Changes	Total Estimate	Con
4									
5									
6	[Job]	[Cost Code]	[Category]	[Description]	[Original Estimate]	[Estimate Changes]	[Estimate Changes]	[Total Estimate]	[vised C]
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									
17									
18									
19									
20									

Repeat as needed to remove any other Group Headers or Footers from the Spreadsheet Template.

## Document Headers & Footers

Document Headers & Footers are optional sections that appear once at the beginning and end of a spreadsheet, respectively.

While Group Headers and Group Footers are added to a spreadsheet inside the Repeat Section, Document Headers & Footers must be added outside the Repeat Section.

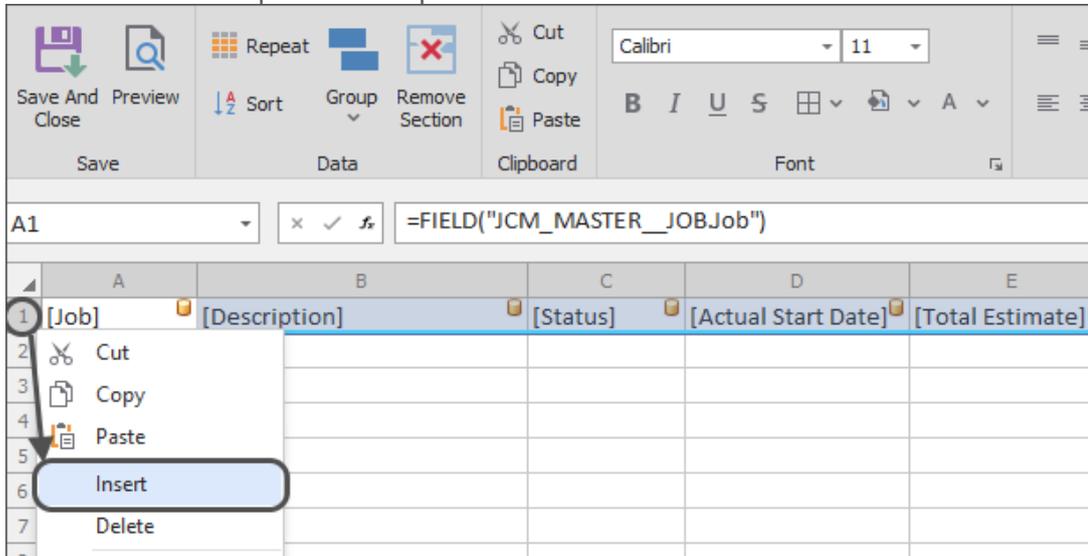
### Document Headers

Document Headers can include the name of the spreadsheet, column headings, the date the spreadsheet was run, and any Sage information that applies to all the information in the spreadsheet (for example: if sending a separate spreadsheet of Cost Codes by Job, the JC Job Number and Description could be added to the Document Header).

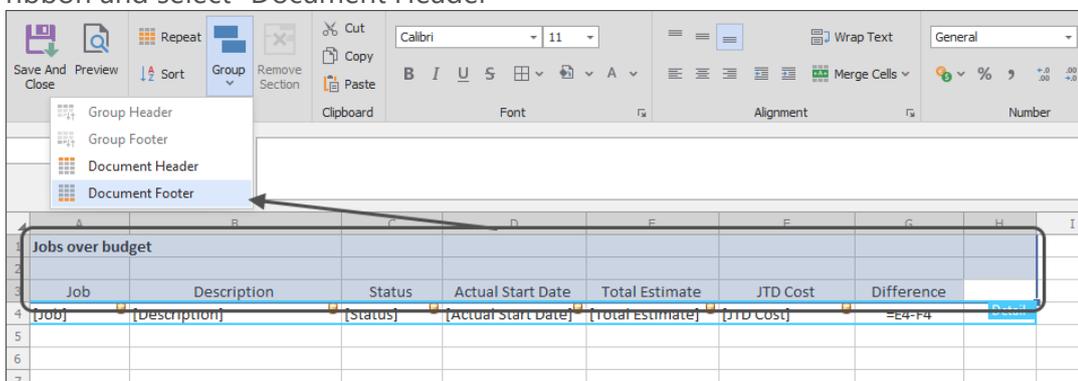
## To add a Document Header

These steps assume the Spreadsheet Template does not have an existing Document Header, and begin after opening the Spreadsheet Template in the Email step of Task Setup:

1. **Add rows to the top of the Spreadsheet:** Right click on the row header for the first row in the spreadsheet and select "Insert". This will add rows to the top of the spreadsheet that will be used for the Document Header. Repeat to add as many rows as desired to the top of the template:



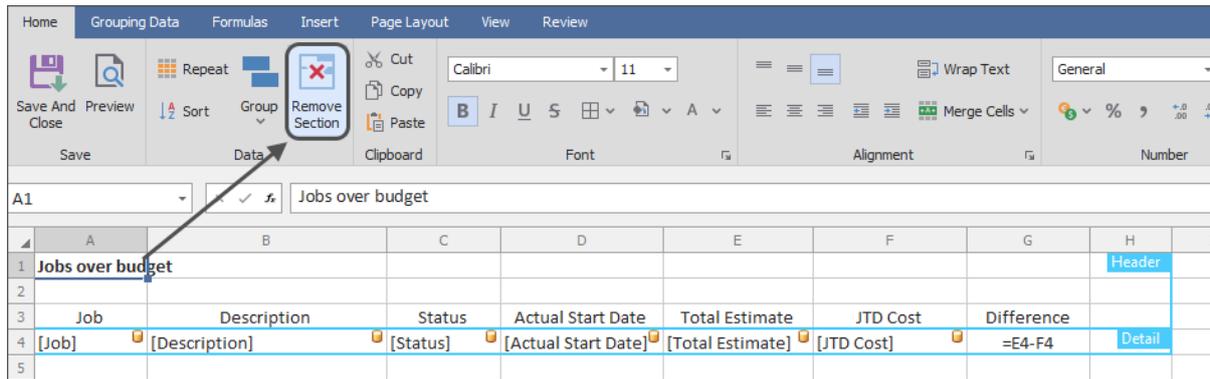
2. **Add information:** Type in column headings and add any information that will print once at the top of the Document Header (for example: title of the spreadsheet, date the spreadsheet is being created, etc.)
3. **Set the Header:** Click and drag the mouse to highlight the cells above the Repeat Section that will make up the Document Header, then click the "Group" button in the ribbon and select "Document Header"



**Note:** Only cells above the Repeat Section can be used to create a Document Header that will print correctly. Also, if any cells inside the Repeat Section are included in the selection, a Document Header cannot be set.

## To remove a Document Header

If a Document Header already exists in a Spreadsheet Template and needs to be removed, select a cell anywhere in the Document Header and click the "Remove Section" button in the ribbon:



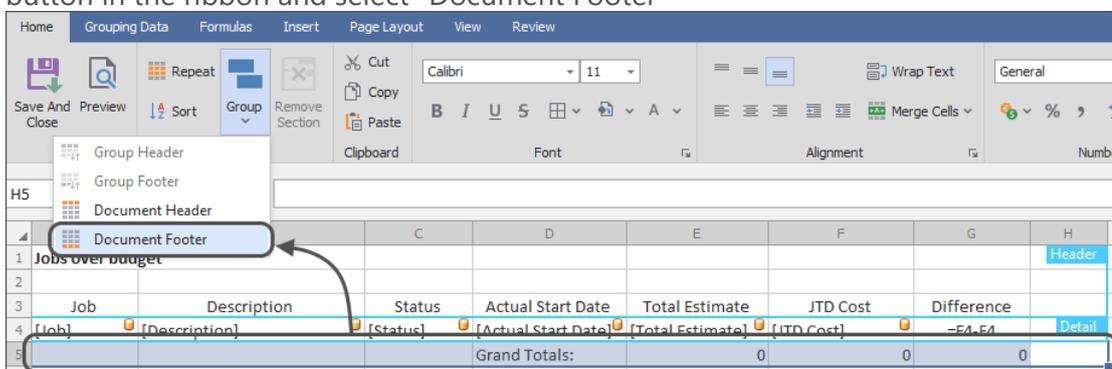
## Document Footers

Document Footers are often used for totals or any information that should be displayed once at the bottom of the spreadsheet (for example: if sending a separate spreadsheet of Cost Codes by Job, the JC Job Description could be added as a label for the grand totals in Document Footer).

## To add a Document Footer

These steps assume the Spreadsheet Template does not have an existing Document Footer, and begin after opening the Spreadsheet Template in the Email step of Task Setup:

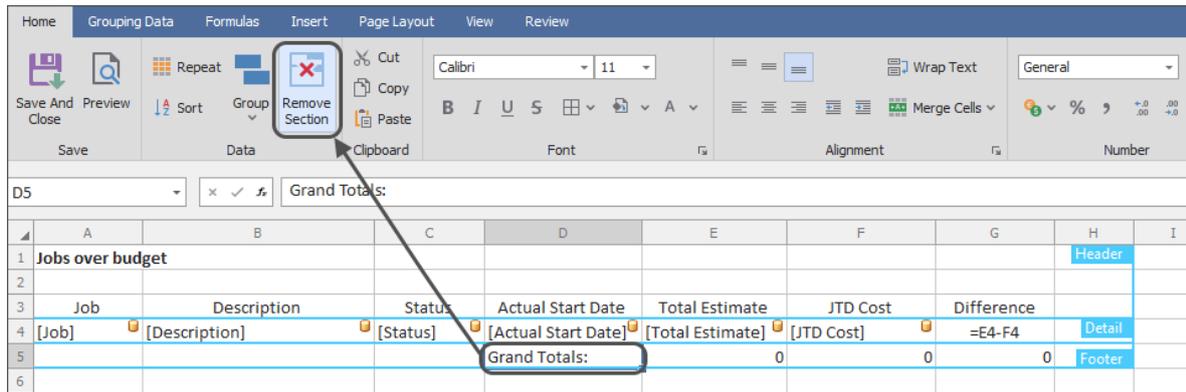
1. **Add information under the Repeat Section:** Add any totals or other information that should print once at the bottom of the spreadsheet
2. **Set Document Footer section:** Click and drag the mouse to highlight the cells below the Repeat Section that will make up the Document Footer; then click the "Group" button in the ribbon and select "Document Footer"



**Note:** Only cells below the Repeat Section can be used to create a Document Footer that will print correctly. Also, if any cells inside the Repeat Section are included in the selection, a Document Footer cannot be set.

## To remove a Document Footer

If a Document Footer already exists in a Spreadsheet Template and needs to be removed, select a cell anywhere in the Document Footer and click the "Remove Section" button in the ribbon.

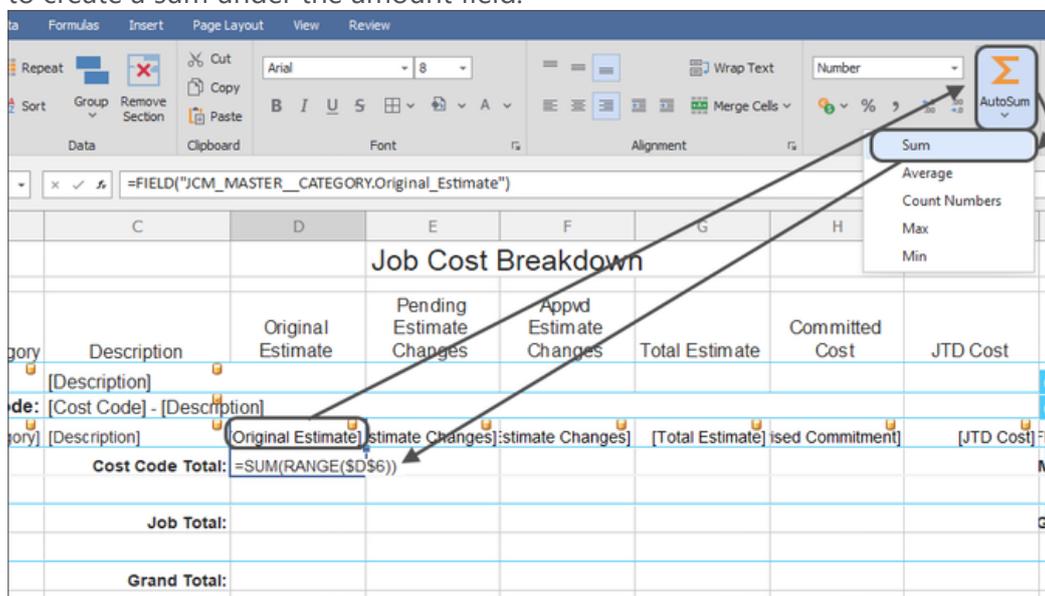


## Totals

Amount fields can be totaled in spreadsheets sent by MyAssistant, including having multiple totals for a column (for example: subtotals by group and a grand total at the bottom of the spreadsheet). Since MyAssistant uses Spreadsheet Templates and the number of rows in a spreadsheet can change between Task runs, a special function must be used.

The following outlines the possible steps to add totals to a Spreadsheet Template. Depending on the desired spreadsheet(s) sent by the Task, some steps can be skipped. These steps begin after opening the Spreadsheet Template in the email step of Task Setup:

1. **Add the first total:** Select the cell with the amount that will be totaled, then click the "AutoSum" button in the ribbon and select "Sum". This will add the formula needed to create a sum under the amount field:



This formula is designed so that no matter how many rows appear in the Repeat Section, every time the Task runs the sum will be correct.

2. **Highlight the cells for the second total:** Click and drag the mouse to highlight the original amount field, the previous sum, and any rows between the amount field and where the second amount will go.

	A	B	C	D	E	F		
1					<b>Job Cost Breakdown</b>			
2								
3		Category	Description	Original Estimate	Pending Estimate Changes	Appvd Estimate Changes	Total E	
4		Job: [Job]	[Description]					
5		Cost Code: [Cost Code]	[Description]					
6		[Category]	[Description]	[Original Estimate]	Estimate Changes	Estimate Changes	[Total	
7			Cost Code Total:	0				
8								
9			Job Total:					
10								
11			Grand Total:					
12								
13								
14								

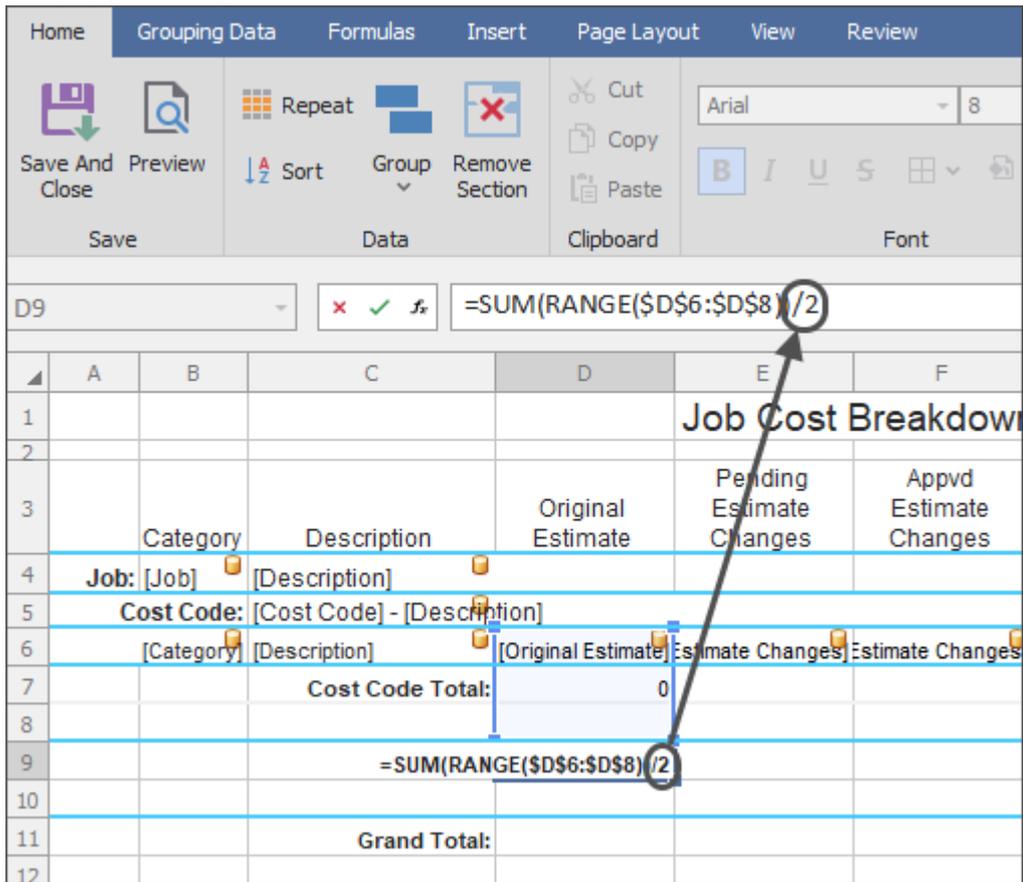
The rows between the amount and where the second total will go need to be included to ensure that all amount fields are correctly considered when creating the next sum

3. **Create and move the second total:** Click on the cell with the new total, then hover on the edge and drag it down to the correct position in the next group footer/document footer.

The screenshot shows the Excel interface with the 'Job Cost Breakdown' table. The formula bar at the top displays the formula: `=FIELD("JCM_MASTER_CATEGORY.Original_Estimate")`. A context menu is open over the 'Sum' function, showing options: Sum, Average, Count Numbers, Max, and Min. The table structure is as follows:

	A	B	C	D	E	F	G	H	I	J	
1											Header
2											
3		Category	Description	Original Estimate	Pending Estimate Changes	Appvd Estimate Changes	Total Estimate	Committed Cost	JTD Cost	Remaining Budget	
4		Job: [Job]	[Description]								GroupHeader0
5		Cost Code: [Cost Code]	[Description]								GroupHeader1
6		[Category]	[Description]	[Original Estimate]	Estimate Changes	Estimate Changes	[Total Estimate]	Used Commitment	[JTD Cost]	FIELD(JTD Cost)	GroupFooter1
7			Cost Code Total:								GroupFooter1
8											GroupFooter0
9			Job Total:								GroupFooter0
10											
11			Grand Total:								Footer
12											

4. **Adjust the second total:** Double-click in the second total field and add "/2" to the end of the formula.



This is needed because the range of cells being calculated for the second total will be double what the number should be. This is the result of summing the original amount field and the first total -- all in the same column.

**Important:** Whatever number a Total is in a single column in the spreadsheet, add *"/\*number\*"* to the end of the Sum formula.

For example: A spreadsheet has a list of Subcontracts that are grouped by Job and Vendor. The spreadsheet has a column where the Subcontract Amount is being totaled by Job, then Vendor, and finally a grand total at the end of the spreadsheet. For accurate totals, the Vendor total will need to be divided by 2, and the grand total will need to be divided by 3.

Repeat the above steps as needed to add as many totals as desired to a Spreadsheet Template

# Prebuilt Spreadsheet Templates

MyAssistant contains several prebuilt Spreadsheet Templates that can be attached to a Task. A Prebuilt template can be used instead of creating a template from the Notification List in the Email step -- this saves time while providing the desired information.

**Tip:** Type "Spreadsheet" into the search on the main MyAssistant window (when viewing all Tasks) to see prebuilt MyAssistant Tasks with Spreadsheet Templates already attached

Every Spreadsheet Template gets linked to Sage record based on what the Task is set to send a Spreadsheet of when the template is created. As such, not all prebuilt templates are available on all Tasks.

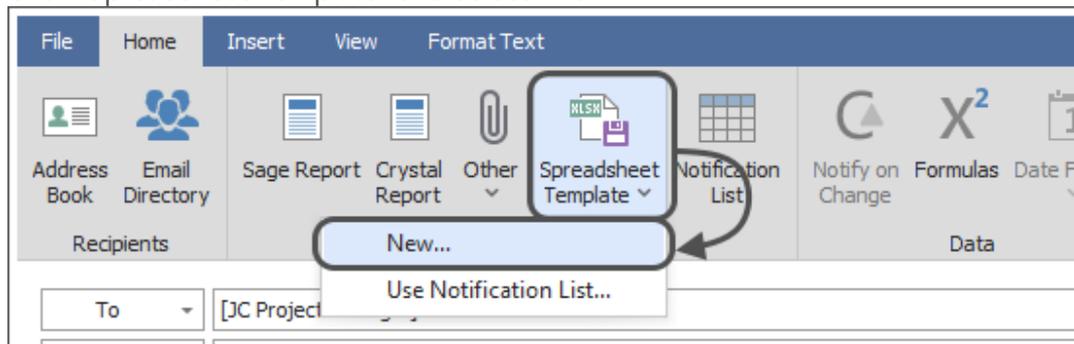
## Available Templates

The following list outlines all prebuilt Spreadsheet Templates available in MyAssistant, as well as what each template creates a spreadsheet of:

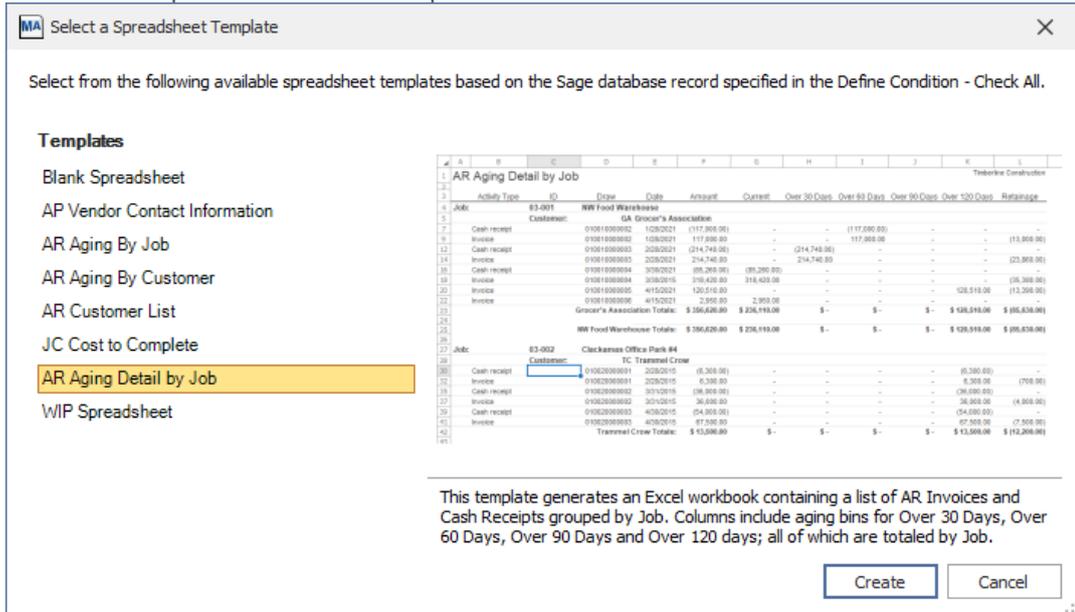
Spreadsheet Template	Creates a Spreadsheet of
AP Cash Flow by Vendor	AP Invoices
AP Invoice Register by Job	AP Invoices
AP Vendor Payments by Job	AP Invoice Distribution Payments
AR Aging by Job	AR Invoices (i.e. AR Status)
AR Aging Detail by Job	AR Invoices & Cash Receipts (i.e. AR Activity)
Cost Entries by Job	JC Transactions
JC Cost Breakdown	JC Categories
JC Cost to Complete	JC Cost Codes
RFI Log	PJ RFIs
SM Agreements	SM Agreements
Vendor Insurance by Job	JC Subcontracts and Purchase Orders (i.e. JC Commitments)
WIP Spreadsheet	JC Jobs

## To attach a prebuilt Spreadsheet Template to a Task:

1. Create a new Task or activate a prebuilt Task and advance to the Email step of Task Setup
2. Click "Spreadsheet Template" and select "New"



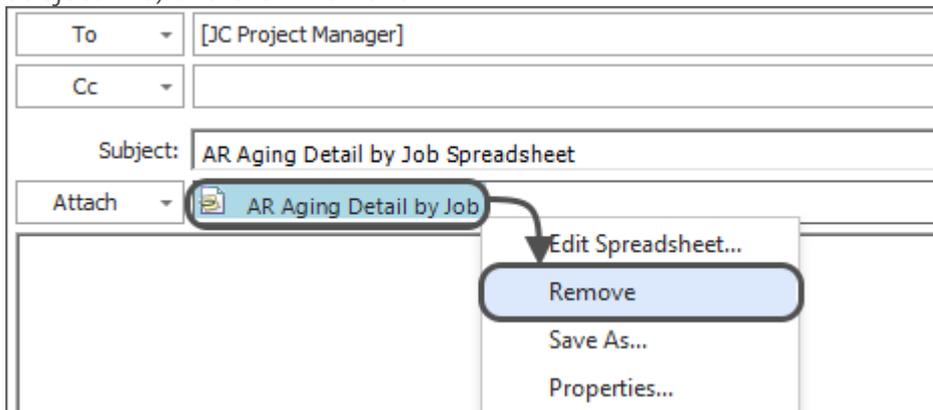
3. Select a Template: Choose a template from the list and click OK



**Reminder:** The list of available Prebuilt Spreadsheet Templates will vary based on what was selected in the "Spreadsheet of" dropdown in the "What to Send" step of Task Setup.

**To remove a prebuilt Spreadsheet Template from a Task:**

1. Select the Task sending the Spreadsheet Template in the main MyAssistant window and click "Open" in the ribbon
2. Advance to the Email step of Task Setup
3. Right-click on the Spreadsheet Template in the attachments section (under the Subject line) and click "Remove"

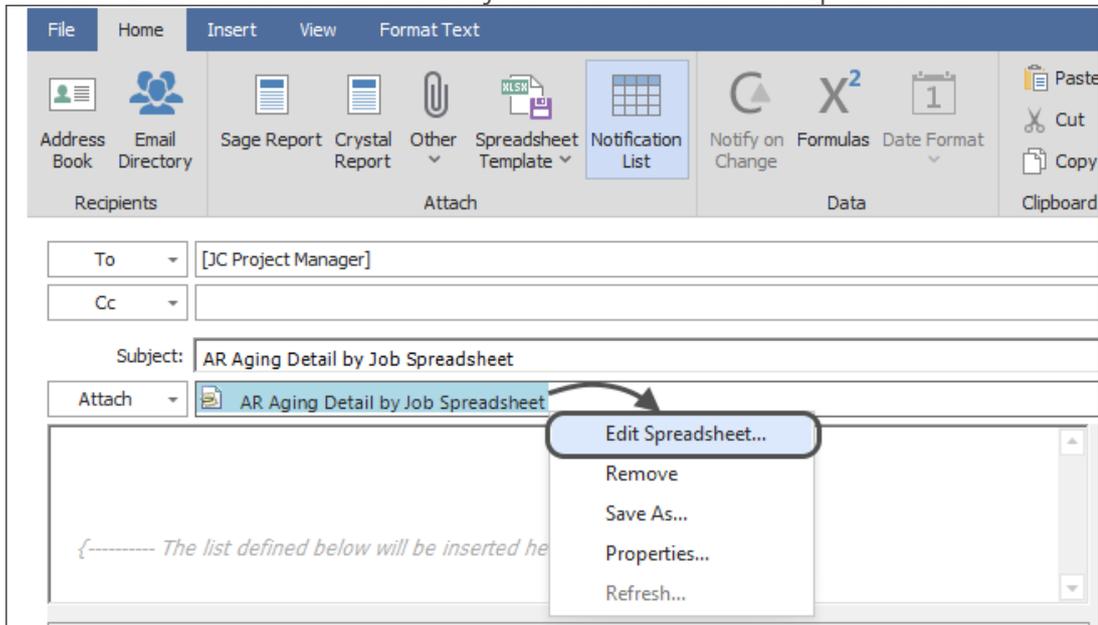


# Security

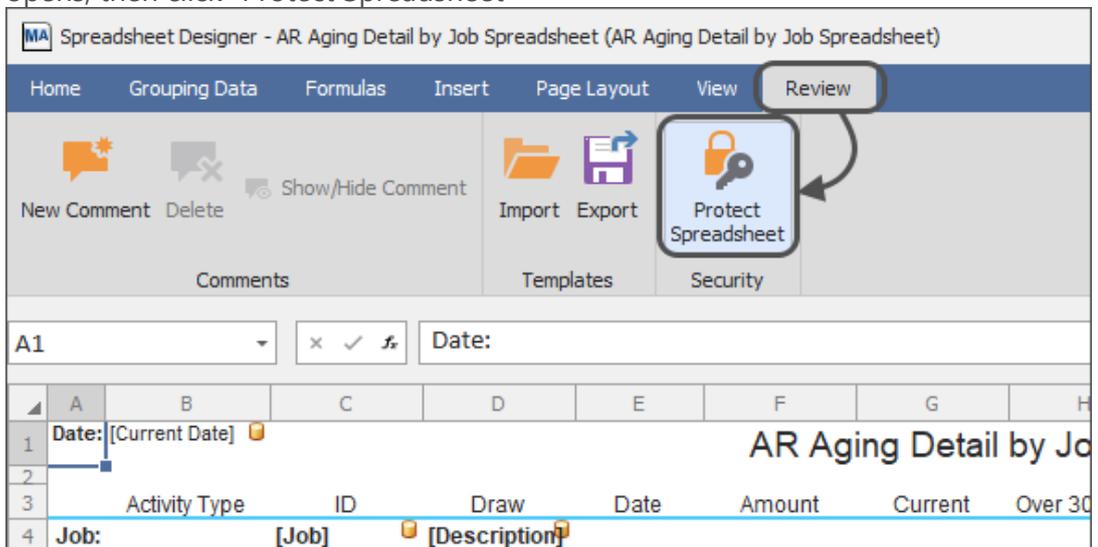
MyAssistant send spreadsheets that can require a password in order to be opened, and can require a separate password in order to make changes.

The following outlines the possible steps to add passwords for opening and editing a Spreadsheet Template. Depending on the desired level of security for the spreadsheet(s) sent by the Task, some steps can be skipped. These steps begin in the Email step of Task Setup:

1. **Open the Spreadsheet Template:** Right-click on the Spreadsheet Template in the "Attachments" section under the Subject line and select "Edit Spreadsheet"



2. **Open the Security Settings:** Click the "Review" tab of the ribbon in the window that opens, then click "Protect Spreadsheet"



3. **Set a password to open the Spreadsheet:** Check "Require a password to open the document" and enter a password in the specified fields

4. **Set a password to edit the Spreadsheet:** Check "Require a password to edit content" and enter a password in the specified fields (this does can be a separate password than the one for opening the spreadsheet)
5. **Set any exclusions:** Check the box for each activity that can be done without entering the password required to edit content. Options include inserting and deleting columns and rows; and more.

Protect Spreadsheet

Require a password to open the document

Password:

Confirm Password:

Show characters

Require a password to edit content

Password:

Confirm Password:

Show characters

Exclusions - allow all users of this worksheet to:

- Delete columns
- Delete rows
- Format cells
- Format columns
- Format rows
- Insert hyperlinks
- Insert rows
- Make changes to shapes or charts
- Make changes to pivot table reports

Cancel OK

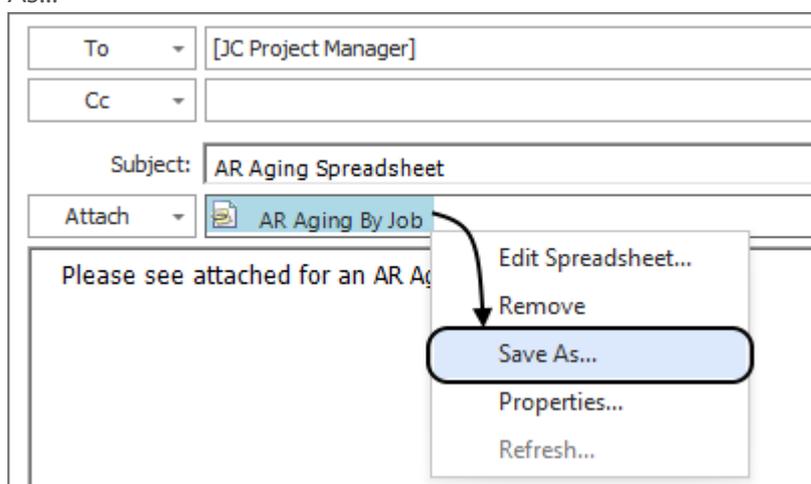
6. **Save the Template:** Click OK to close the window, then click the "Home" of the ribbon and select "Save and Close" to close the template

# Import & Export Spreadsheet Templates

MyAssistant features the ability to import and export Spreadsheet Templates from Tasks. Exporting a spreadsheet template can be useful when needing assistance or having a change made by someone outside the office. Importing a Spreadsheet Template allows for quickly updating or setting up a new spreadsheet on a Task.

## To Export a Spreadsheet Template:

1. Select the MyAssistant Task with the attached spreadsheet in the main MyAssistant window
2. Click "Open" in the button bar to open the Task
3. Click "Email" on the left side of the window that opens to go to the Email Step
4. Right-click on the Spreadsheet Template in the attachments section and select "Save As..."

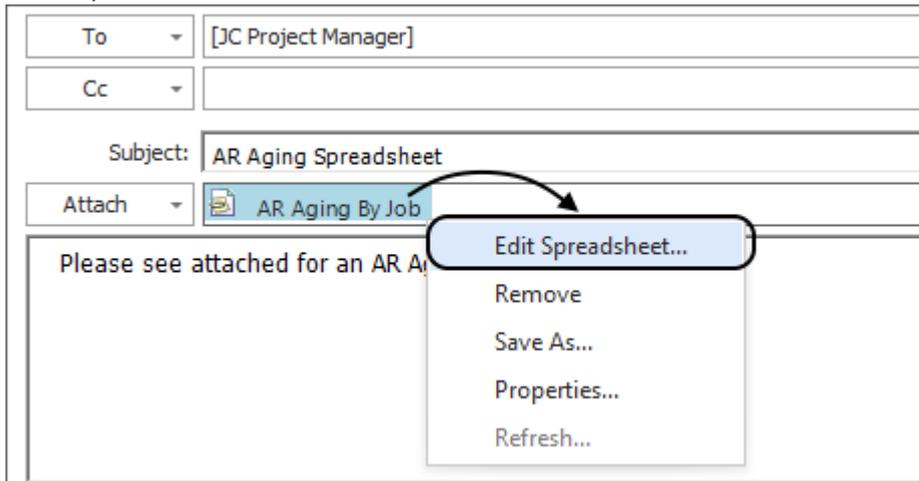


5. Navigate to where the Spreadsheet Template should be saved, then click "Save"
6. Click "OK" to close the Task

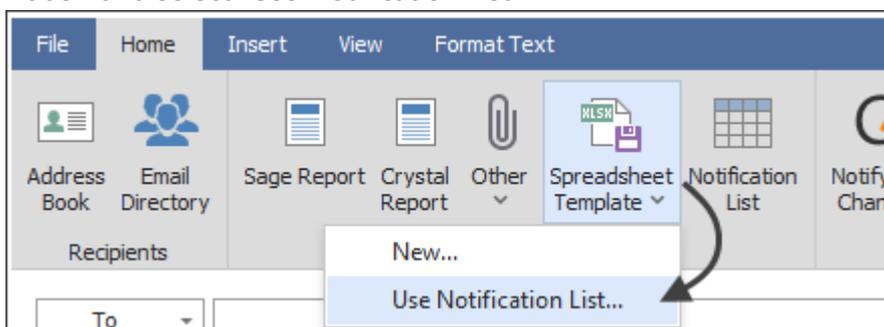
## To Import a Spreadsheet Template:

1. Select the MyAssistant Task with the attached spreadsheet in the main MyAssistant window
2. Click "Open" in the button bar to open the Task
3. Click "Email" on the left side of the window that opens to go to the Email Step

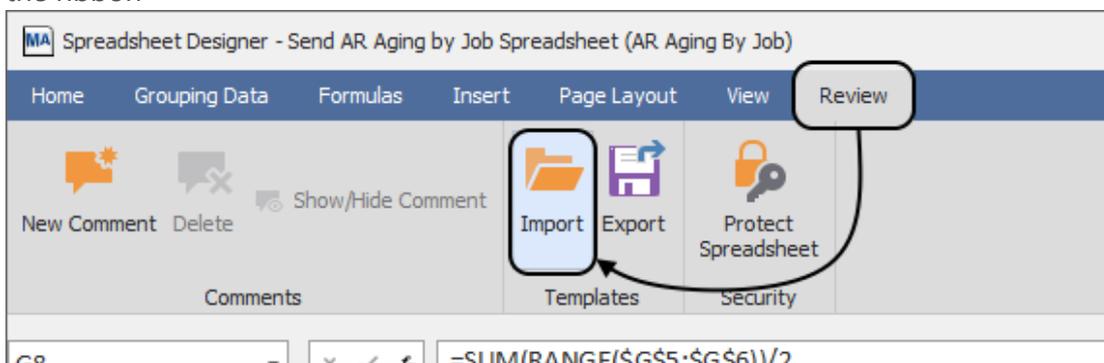
4. If a Spreadsheet Template is already attached, right-click on the template and select "Edit Spreadsheet"



5. If a Spreadsheet Template is not on the Task, click "Spreadsheet Template" in the ribbon and select "Use Notification List"



6. Click the "Review" tab of the ribbon in the window that opens, then click "Import" in the ribbon



7. Navigate to and select the Spreadsheet Template that should be imported, then click "Open"
8. Click the "Home" tab of the ribbon, then click "Save and Close"

# Saving Copies of Spreadsheets

MyAssistant can save a copy of any attached report, document or spreadsheet created from a Spreadsheet Template 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, each report can be saved in a unique location. This enables companies to be more organized.

MyAssistant can also automatically create folders based on the values of Sage fields added to the save path. For example, MyAssistant can create a unique folder for each Job, Customer, Employee, etc.

## How to Save Attachments Created with MyAssistant Spreadsheet Templates:

1. Select the 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, choose what form you select the path where you want to save copies of the spreadsheet(s) sent by the Task

MA Spreadsheet Options

Enter the name of the spreadsheet which will be used when sending the spreadsheet as an attachment.

File Name: Cost Codes over budget Use Sage value in name...

File type: MS Excel Workbook

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

Confirm password: Show characters

Save Excel Attachments

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

Separate spreadsheet for each Sage data folder

Ok Cancel

**Note:** Attachments created from a Spreadsheet Template can be saved as a file type other than Excel Workbook. Spreadsheet Templates can also create PDFs, plain text files, or CSV documents.

# Settings

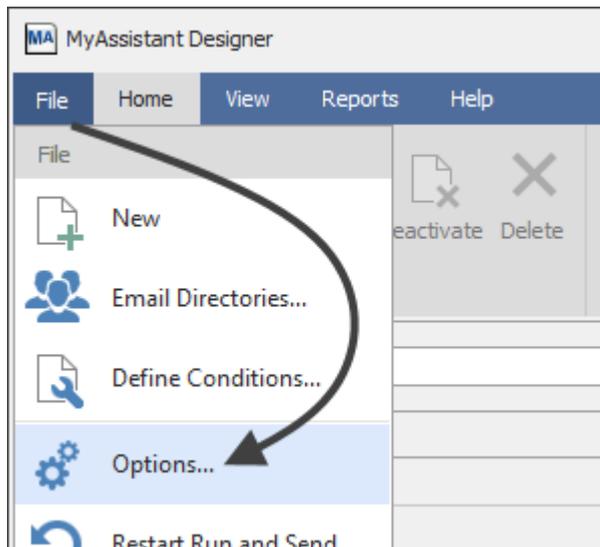
MyAssistant has two parts: the MyAssistant Server software and the MyAssistant workstation(s). After installing and configuring the MyAssistant Server software, the next thing that will be installed will be MyAssistant on any workstations where it will be used.

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:

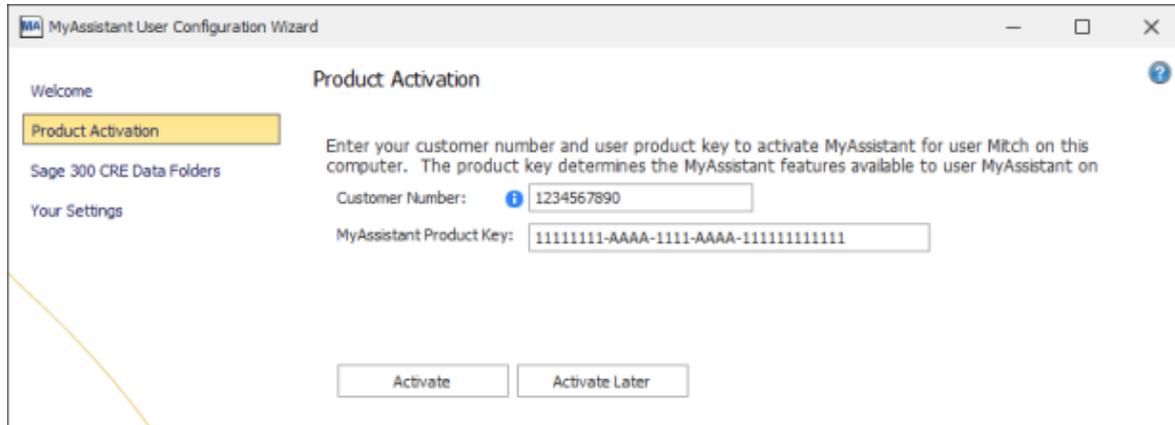
1. [Activate](#) the MyAssistant workstation license (either MyAssistant Designer or MyAssistant)
2. Enter the [Sage user name and password](#) MyAssistant will use for local processes (for example: browsing data)
3. Enter [information about yourself](#)

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 be 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:

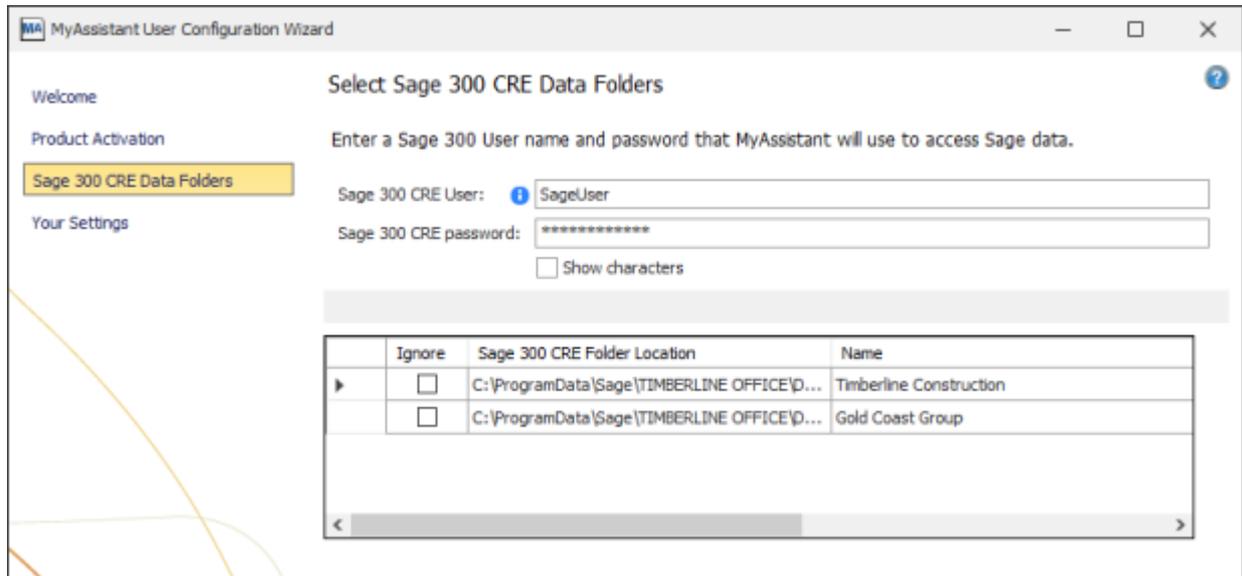
- **Customer Number:** Sage customer number assigned to your company. This can be found in the Sage Customer Portal, or by opening a Sage 300 application, clicking the Help menu button and selecting "About [Application Name]"
- **Product Key:** MyAssistant Workstation product key. This will be one of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

The screenshot shows the 'Server Settings' window in MyAssistant Designer. It includes the following sections:

- Product Activation:** Sage 300 CRE Data Folders, Server Settings (highlighted), Your Settings.
- Server Settings:** Enter a Sage 300 CRE operator and password that MyAssistant will use to access Sage 300 CRE data.
  - Sage 300 CRE User: SageUser
  - Sage 300 CRE password: [masked]
  - Show characters
  - Buttons: Import Sage Database Customizations, Test Connection
- Specify which email account(s) MyAssistant will send emails from on this server.**
- Outgoing Email Server:** smtp.office365.com
- Outgoing Email Server Port:** 587  Use an SSL / TLS connection
- From Email Account(s):**  Show password characters
- Table of Email Accounts:**

	Default	From Name	Email Address	User Name	Password	
▶	<input checked="" type="checkbox"/>	Accounts Payable	ap@company.com	ap@company.com	*****	Test...
	<input type="checkbox"/>	Payroll	pr@company.com	pr@company.com	*****	Test...
	<input type="checkbox"/>	John	John@company.com	john@company.com	*****	Test...
*	<input type="checkbox"/>					

- Send Errors To:**
- Recipient name: Accounts Payable
- Recipient email: ap@company.com
- Button: Browse...

**Note:** This step is only available in the MyAssistant Designer by clicking the File menu option, selecting "Options" and clicking on "Server Settings" in the window that opens. 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 it 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 (for example: 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:

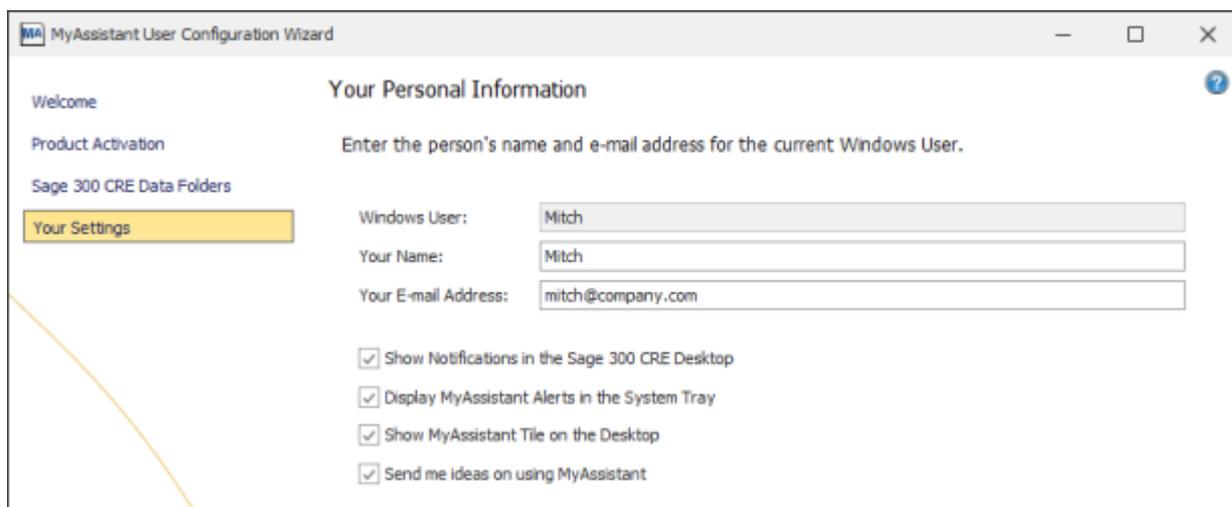
- **Default Checkbox** – This controls which account MyAssistant sends emails from when a "From" [email address](#) isn't specified on a Task.
- **From Name** – This name is displayed in the recipient's inbox
- **Email Address**
- **User Name** – In most cases the user name is the email address. Confirm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



The screenshot shows a window titled "MyAssistant User Configuration Wizard". On the left, there is a navigation pane with options: "Welcome", "Product Activation", "Sage 300 CRE Data Folders", and "Your Settings" (which is highlighted in yellow). The main area is titled "Your Personal Information" and contains the instruction: "Enter the person's name and e-mail address for the current Windows User." Below this, there are three text input fields: "Windows User:" with the value "Mitch", "Your Name:" with the value "Mitch", and "Your E-mail Address:" with the value "mitch@company.com". At the bottom, there are four checked checkboxes: "Show Notifications in the Sage 300 CRE Desktop", "Display MyAssistant Alerts in the System Tray", "Show MyAssistant Tile on the Desktop", and "Send me ideas on using MyAssistant".

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

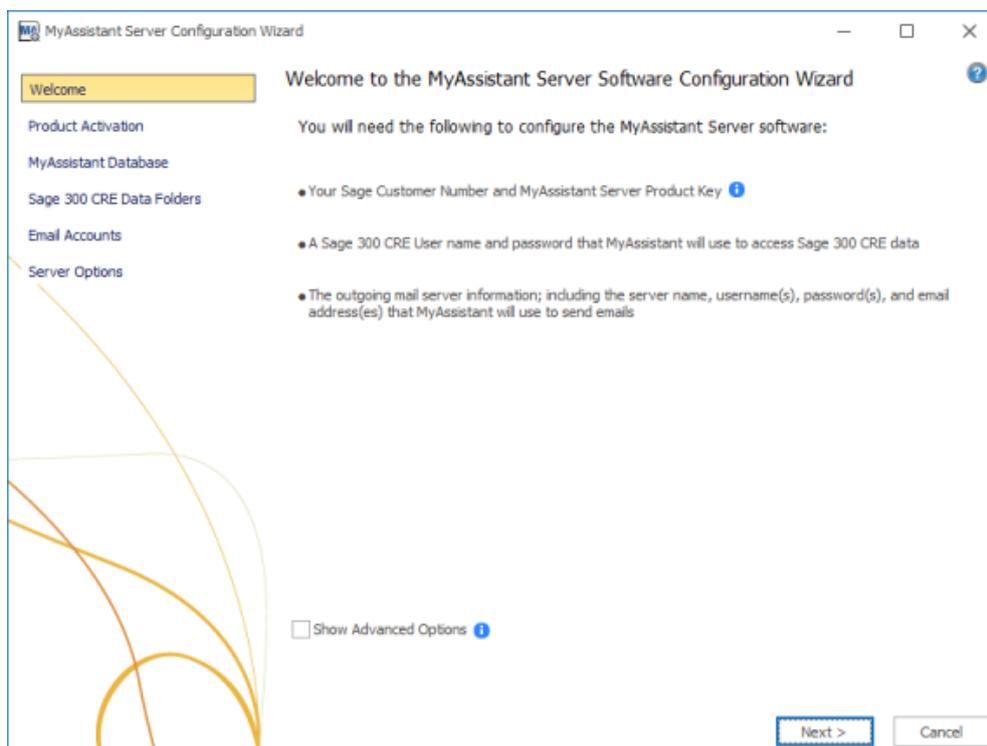
MyAssistant has two parts: the MyAssistant Server software and the MyAssistant workstation(s). When initially setting up MyAssistant, the first thing installed will be the MyAssistant Server software.

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](#)

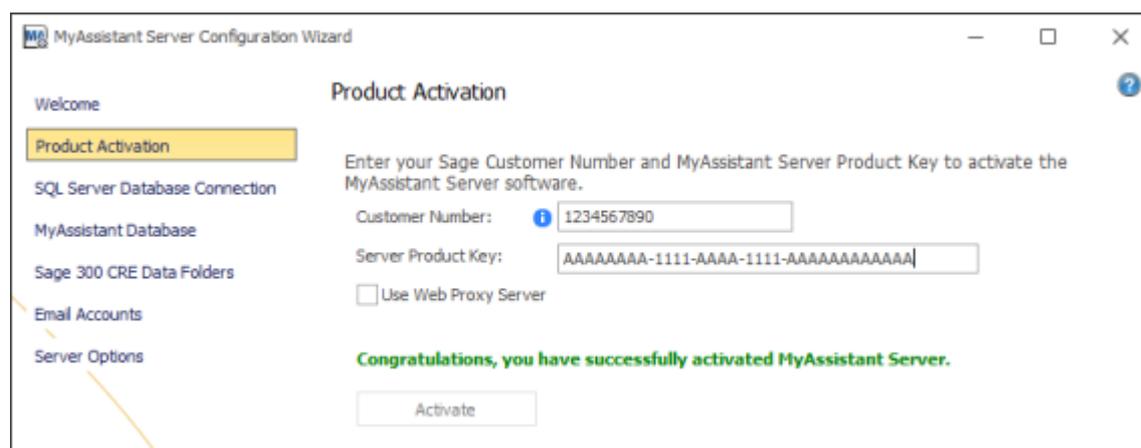
When you configure the MyAssistant Server, you'll start on a "Welcome" screen with a couple reminders of what you'll need and an option to show the Advanced Options.



# 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, clicking the "Help" menu button and selecting "About [Application Name]"
- **Product Key:** The product key for activating the MyAssistant Server. This is the only place the MyAssistant Server product key will be entered.



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.

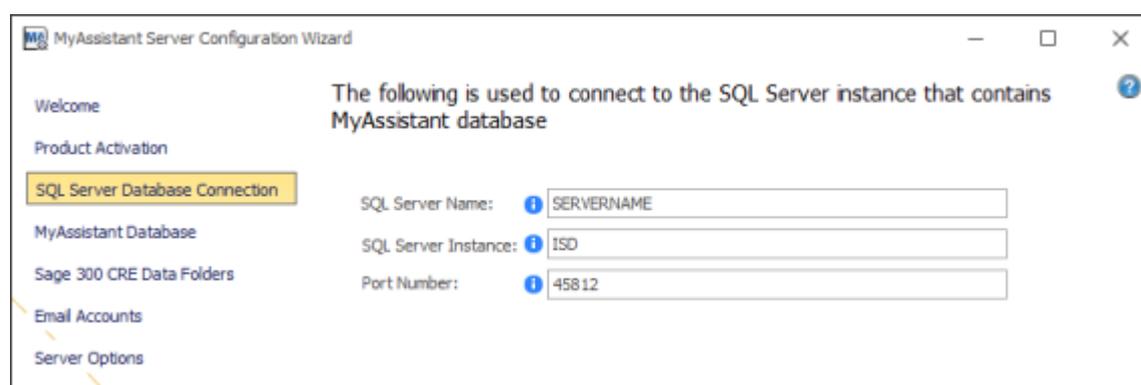
**Note:** The Web Proxy Server checkbox will only appear if you selected Show Advanced Options in the Welcome step. If you use a Web Proxy Server, check the box displayed under the Server Product Key field and provide the requested information.

# 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.



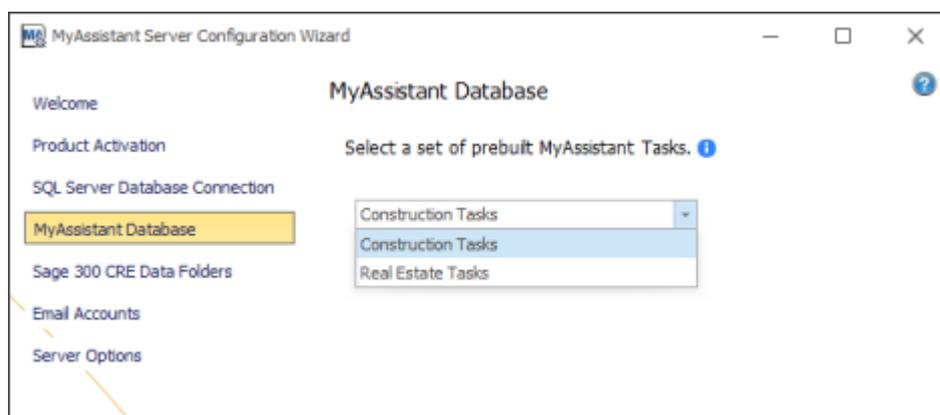
The screenshot shows a window titled "MyAssistant Server Configuration Wizard". On the left is a navigation pane with the following items: "Welcome", "Product Activation", "SQL Server Database Connection" (highlighted in yellow), "MyAssistant Database", "Sage 300 CRE Data Folders", "Email Accounts", and "Server Options". The main area of the wizard contains the text: "The following is used to connect to the SQL Server instance that contains MyAssistant database". Below this text are three input fields, each with a blue information icon to its left: "SQL Server Name:" with the value "SERVERNAME", "SQL Server Instance:" with the value "ISD", and "Port Number:" with the value "45812".

**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.

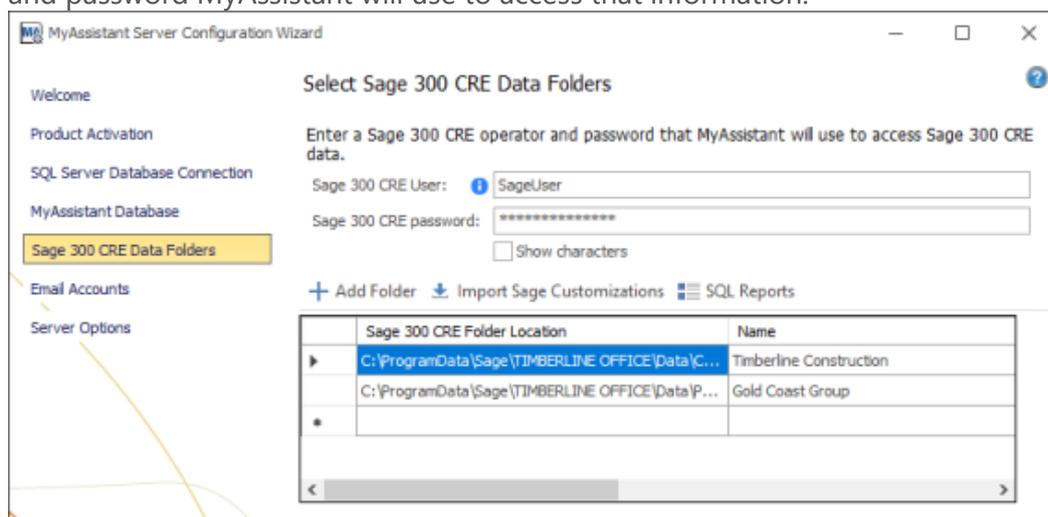


**Note:** This step will only appear when configuring the MyAssistant Server and creating a MyAssistant database for the first time.

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 the "File" menu button, click on "Options", then 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.

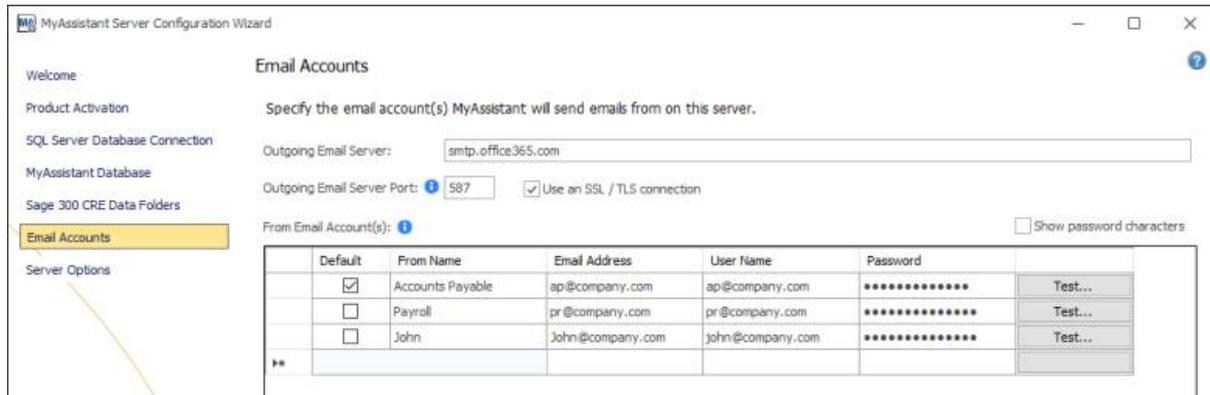
**Note:** Only one Sage folder's custom fields & descriptions can be in MyAssistant at a time. Importing another Sage data folder's customizations will overwrite previous Sage customizations in MyAssistant.

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 MyAssistant, clicking the "File" menu button, clicking on "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 the "File" menu button, click on "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:

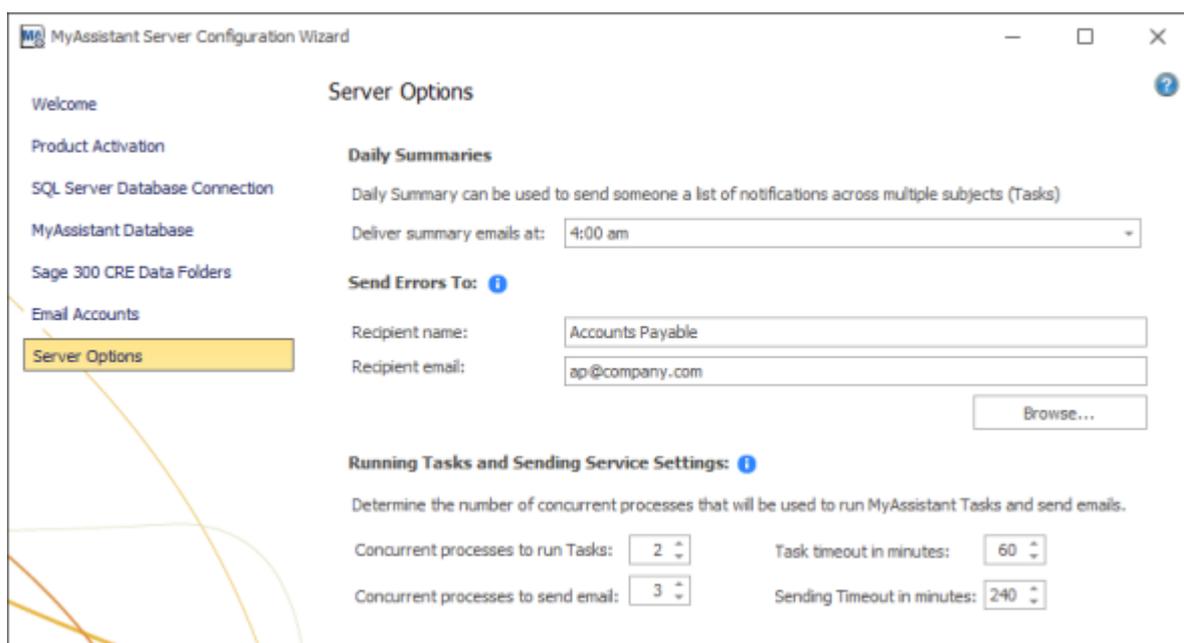
- **Default Checkbox** – This controls which account MyAssistant sends emails from when a "From" email address isn't specified on a Task.
- **From Name** – This name is displayed in the recipient's inbox
- **Email Address**
- **User Name** – Often the email address (Confirm with your email server administrator)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



The screenshot shows the 'MyAssistant Server Configuration Wizard' window, specifically the 'Server Options' step. On the left, a navigation pane lists steps: Welcome, Product Activation, SQL Server Database Connection, MyAssistant Database, Sage 300 CRE Data Folders, Email Accounts, and 'Server Options' (which is highlighted in yellow). The main area is titled 'Server Options' and contains the following sections:

- Daily Summaries:** A description states 'Daily Summary can be used to send someone a list of notifications across multiple subjects (Tasks)'. Below this is a dropdown menu for 'Deliver summary emails at:' set to '4:00 am'.
- Send Errors To:** A section with an information icon. It includes a 'Recipient name:' field with 'Accounts Payable' and a 'Recipient email:' field with 'ap@company.com'. A 'Browse...' button is located to the right of the email field.
- Running Tasks and Sending Service Settings:** A section with an information icon. It includes a description: 'Determine the number of concurrent processes that will be used to run MyAssistant Tasks and send emails.' Below this are four spinner controls: 'Concurrent processes to run Tasks:' (set to 2), 'Task timeout in minutes:' (set to 60), 'Concurrent processes to send email:' (set to 3), and 'Sending Timeout in minutes:' (set to 240).

### 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 the "File" menu button, clicking on "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 of processes based on the results of this test and available server resources.

# Miscellaneous

## Where Information is Stored in Sage

This table helps identify where information is stored in Sage based on where it's entered.

<b>Sage Application and Menu Option</b>	<b>Where Information is Stored</b>
AP > Tasks > Print Checks	AP Check
AP > Tasks > Enter Invoices > Bottom Half of Window	AP Distribution
AP > Tasks > Generate Electronic Payments	AP Electronic Payment
AP > Tasks > Enter Invoices > Top Half of Window	AP Invoice
AP > Setup > Vendors	AP Vendor
AR > Tasks > Enter Cash Receipts	AR Activity
AR > Setup > Customers	AR Customer
AR > Tasks > Enter Invoices	AR Status
BL > Tasks > Quick Bill Invoices	BL Invoice
BL > Tasks > Quick Bill Invoices	BL Item
Comes from PR, AP, EQ	BL Work in Progress
BL > Tasks > Contract-Based Invoices	BL Worksheet Entry
CM > Setup > Bank Accounts	CM Bank Account
CN > File > Open Contract	CN Contract
CN > File > Open Contract > Items listed under the Contract	CN Contract Item
EQ > Setup > Equipment	EQ Equipment
EQ > Tasks > Enter Costs / Enter Revenues	EQ Transaction
GL > Setup > Accounts	GL Account
GL > Setup > Prefix/Base	GL Account Prefix A
GL > Tasks > Record Entries; GL > Tasks > Change Entries	GL Transaction
JC > Setup > Category	JC Category
JC > Tasks > Change Orders	JC Change Order
JC > Tasks > Commitments	JC Commitment
JC > Tasks > Commitments > Grid	JC Commitment Item
JC > Setup > Cost Codes	JC Cost Code
JC > Setup > Jobs	JC Job
JC Transactions created when entering costs, processing Payroll and AP; etc.	JC Transaction
PR > Tasks > Enter Checks; PR > Tasks > Print Checks	PR Check
PR > Setup > Employees	PR Employee
PR > Setup > Employees > Deduction	PR Employee Deduction
PR > Setup > Employees > Pay	PR Employee Pay
PR > Tasks > Enter Time	PR Time
PJ > Contract Control > Change Orders	PJ Change Order
PJ > Contract Control > Change Requests	PJ Change Request
PJ > Contract Control > Commitment COs	PJ Commitment Change Order

PJ > Setup > Jobs	PJ Job
PJ > Documents > RFI	PJ RFI
PJ > Documents > Submittal	PJ Submittal
PM > Tasks > Manage Lease	PM Lease
PM > Setup > Properties	PM Property
PM > Setup > Tenants	PM Tenant
SM > View > Invoices	SM Invoice
SM > View > Invoices	SM Invoice Items
SM > View > Work Orders	SM Work Order
SM > View > Work Orders > Open a Work Order > Register	SM Work Order Item

## MyAssistant Formulas

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

- A sum (for example: the sum of open AP Invoices for a Vendor)
- Math equations or date math (for example: 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 (for example: 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:

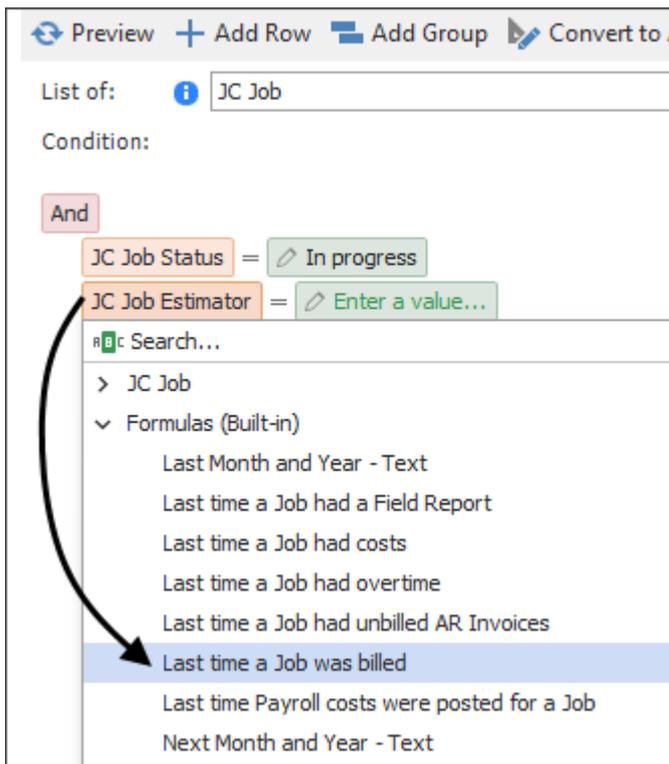
- Sum of open AR Invoices for a Customer
- Percent a Cost Code is over-budget
- Last time a Job had overtime
- Number of different Jobs on a Contract

- 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

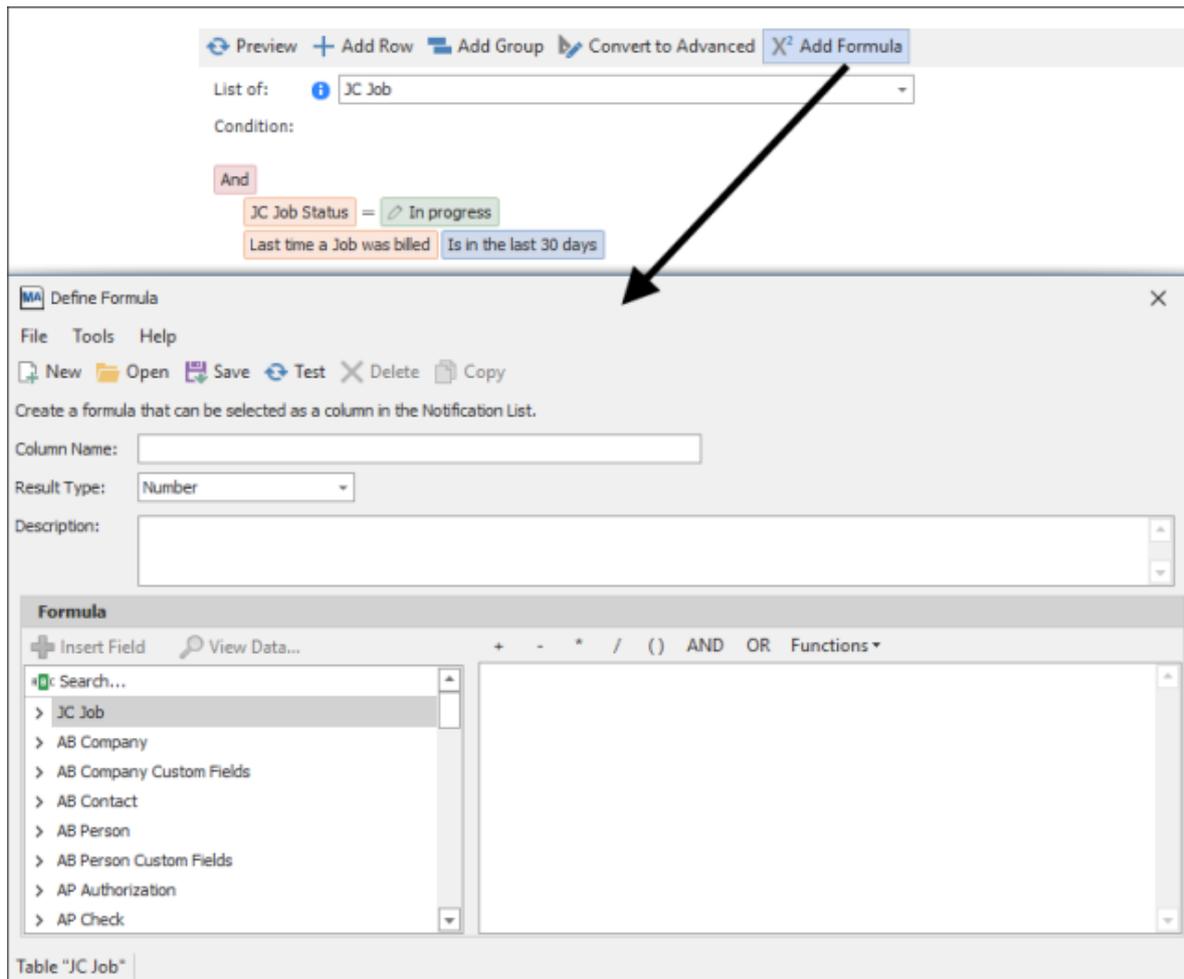
When [building a Condition](#) in Task Setup, you can add a Formula to a row by clicking the Sage field or formula on the left side of the row. Next, expand the "Formulas (Built-In)" or "Formulas (Owner)" group (depending on who created the formula) and select the formula to use in the row:



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:



The screenshot shows the MyAssistant interface. At the top, there is a button bar with options: Preview, Add Row, Add Group, Convert to Advanced, and Add Formula. Below this, a dropdown menu is set to 'JC Job'. A condition is visible: 'JC Job Status = In progress' and 'Last time a Job was billed Is in the last 30 days'. An arrow points from the 'Add Formula' button to the 'Define Formula' dialog box. The dialog box has a menu bar (File, Tools, Help) and a toolbar (New, Open, Save, Test, Delete, Copy). It contains a 'Column Name' field, a 'Result Type' dropdown set to 'Number', and a 'Description' text area. Below these is a 'Formula' section with an 'Insert Field' button and a 'View Data...' button. A tree view on the left shows a hierarchy of fields: JC Job, AB Company, AB Company Custom Fields, AB Contact, AB Person, AB Person Custom Fields, AP Authorization, and AP Check. The main area of the dialog is a large text field for the formula. At the bottom left, it says 'Table "JC Job"'. The dialog box has a close button (X) in the top right corner.

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.

# How to Be Notified of New Information

MyAssistant Tasks can be set up to only send someone an email when new information has been entered in Sage. Examples include being notified when a new Job, Vendor, Employee, Customer, Subcontract, Purchase Order or Invoice has been entered in Sage. This is done by comparing what was found the last time the Task ran to the most recent time the Task ran. If any new items not previously sent in an email were found, those new items are sent to the recipients.

The following steps outline how to set up a Task to send a list of new items entered in Sage:

1. **Create a new Task:** Click the "New" button in the main MyAssistant window to create a new Task
2. **Pick what what new items to check for:** Choose to send a list in the "What to Send" step, then pick [what new items MyAssistant should check for](#) (for example: new Jobs).
3. **Choose which items to send:** Use a prebuilt or create a new [Condition](#) in the "What to Send" step (for example: JC In-progress Jobs). The Condition will find all items in Sage, but settings in later steps will only send the new ones to recipients.
4. **Set criteria of which items to send:** [Create or customize](#) the Condition in the "Condition" step to ensure MyAssistant is looking for the right information

**Important:** It is encouraged that the Condition be as simple as possible (for example: Job Number is not blank) to ensure that no new information is unintentionally excluded from emails sent by the Task. Again, the Task Condition will initially find all items -- not just the new ones. This is expected.

5. **Schedule how often to check for new items:** Specify if the Task should run on a [Schedule](#) in the "Schedule" step.

**Note:** Because the Task (when finished) will only send emails when new information has been entered, it can be ran on a more frequent basis than how often emails should be received. For example, a Task could be run multiple times a day every day of the week, but emails will only be sent when there's new information.

6. **Create the list:** [Select the list's columns](#) by adding Sage fields to the table at the bottom of the "Email" step
7. **Choose who to email:** Specify the [recipients](#) that should be emailed when new information is entered in Sage.

**Note:** MyAssistant individually tracks the recipients on a Task that sends only new information. If a new recipient is added after the Task has been previously run, it is recommended that the Task is run (but doesn't send emails) as outlined in the **Prime the Queue** step below.

8. **Turn on "Notify Once":** Click the "Notification Frequency" field at the top of the "Options" step and select "Once". This controls how often each recipient is emailed about each item (for example: Job) found by the Task. Click "Finish" to close Task Setup after naming the Task
9. **Prime the Queue:** Click "No" when prompted to run the Task and send Notifications after finishing Task Setup (the Task will still be activated). Next, select the Task in the main MyAssistant window and click "Run" in the ribbon. Running the Task but not sending any emails will identify all the information (for example: Jobs) currently in the Sage software, and mark them as sent to each recipient despite no message(s) being sent. This ensures that recipients will only be emailed when new information is entered in Sage.

## How to Be Notified When Information Changes

MyAssistant Tasks can be set up to only send emails when information in a field in Sage has changed. It works by tracking the value(s) in the Sage field(s) you select every time the Task runs. If any of the tracked fields have a different value than the last time the Task ran, the recipients are sent an email of the change, including the old and current values for the field(s). Examples of using "**Notify on Change**" include being notified when contact information on a Job or Vendor has changed; or when an Employee's pay rate has changed.

The following steps outline how to set up a Task to send a list of information that has changed in Sage:

1. **Create a new Task:** Click the "New" button in the main MyAssistant window to create a new Task
2. **Pick what what information to monitor check for:** Choose to send a list in the "What to Send" step, then pick [what Sage records MyAssistant should track for changes](#) (for example: PR Employee Pays in order to monitor rates).
3. **Choose which items to send:** Use a prebuilt or create a new [Condition](#) in the "What to Send" step (for example: PR Employees currently employed). The Condition will find all items in Sage, but settings in later steps will only send emails when something has changed.

4. **Set criteria of which items to send:** [Create or customize](#) the Condition in the "Condition" step to ensure MyAssistant is looking for the right information

**Important:** It is encouraged that the Condition be as simple as possible (for example: Employee ID is not blank) to ensure that no information is unintentionally excluded from emails sent by the Task. Again, the Task Condition will initially find all items -- not just what's changed. This is expected.

5. **Schedule how often to check for changes:** Specify if the Task should run on a [Schedule](#) in the "Schedule" step.

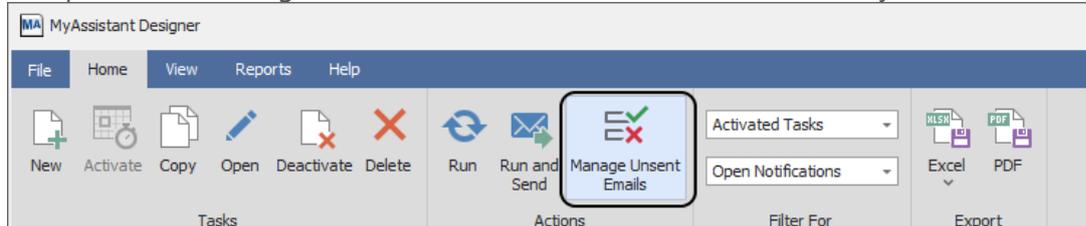
**Note:** Because the Task (when finished) will only send emails when information in Sage has changed, it can be ran on a more frequent basis than how often emails should be received. For example, a Task could be run multiple times a day every day of the week, but emails will only be sent when an Employee's Pay Rate changes.

6. **Create the list:** [Select the list's columns](#) by adding Sage fields to the table at the bottom of the "Email" step
7. **Select the fields to monitor:** Right-click on the column heading in the Notification List and select "Notify on Change" for the fields that should be monitored (for example: the "Rate" field off the PR Employee Pay record). Repeat for any other fields in the Notification List that should be monitored for changes.
8. **Choose who to email:** Specify the [recipients](#) that should be emailed when information changes in Sage.
9. **Close the Task:** Name the MyAssistant Task and click "Finish" in the bottom-right to close Task Setup.
10. **Prime the Queue:** Click "No" when prompted to run the Task and send Notifications after finishing Task Setup (the Task will still be activated). Next, select the Task in the main MyAssistant window and click "Run" in the ribbon. Running the Task but not sending any emails will identify all the information (for example: Employee Pay Rates) currently in the Sage, and the values for the fields being monitored. If the Task were to be run again, the number of Notifications would be zero (because no information in Sage changed between Task runs). This ensures going forward that recipients will only be emailed when information has changed in Sage.

# Manage Unsent Emails

After a Task runs, MyAssistant starts creating and sending any emails that need to be sent. Before emails are handed off to the mail server, the **Manage Unsent Emails** feature allows for tracking and potentially stopping emails from sending.

To open, click "Manage Unsent Emails" in the ribbon of the main MyAssistant window:



The window that opens will list all recipients scheduled to receive emails (including Cc'd and Bcc'd recipients), grouped by Task. At the bottom of the window is a count of recipients across all Tasks that have emails in queue.

The window also contains the following buttons:

**Refresh:** Updates the list of recipients scheduled to receive emails. Any recipients whose emails have been sent since the window was opened/since the last time the "Refresh" button was clicked will be removed from the list.

**Don't Send:** Removes from queue the emails for any recipients or Tasks selected

**Don't Send and Delete:** Removes from queue the emails for any recipients or Tasks selected, and deletes the Notifications from the Task(s) associated with those recipients' emails

**Select All:** Selects all recipients listed across all Tasks

**Deselect All:** Unchecks the checkboxes for all recipients listed across all Tasks

## To stop an email in queue:

1. Click "Manage Unsent Emails" in the button bar in the main MyAssistant window
2. Select the recipient(s) whose emails should not be sent. This could be:
  - a. All recipients across all Tasks with emails in queue (done by clicking "Select All")
  - b. All recipients for a single Task (done by clicking the checkbox for the Task)
  - c. One or more recipients on one or more Tasks (done by expanding each Task and clicking the checkbox for each recipient)
3. Stop the emails from sending and/or delete the associated Notifications
  - a. Clicking "Don't Send" will stop the emails
  - b. Clicking "Don't Send and Delete" will stop the emails and delete the Notifications

# See What Each Recipient Will Receive

Many companies want to be able to review what will be sent from MyAssistant before it goes out, especially when sending each person their reports or documents. Common examples include reviewing weekly pay stubs before they're sent to Employees, or looking at monthly rent bills before they're sent to Tenants. To review what each recipient will receive before sending it to them, perform the following:

## Determine if the Task is using "Send Once Per"

The number of steps to review what each recipient would receive from a MyAssistant Task changes depending on whether or not the Task is already using the [Send Once Per](#) functionality. To check:

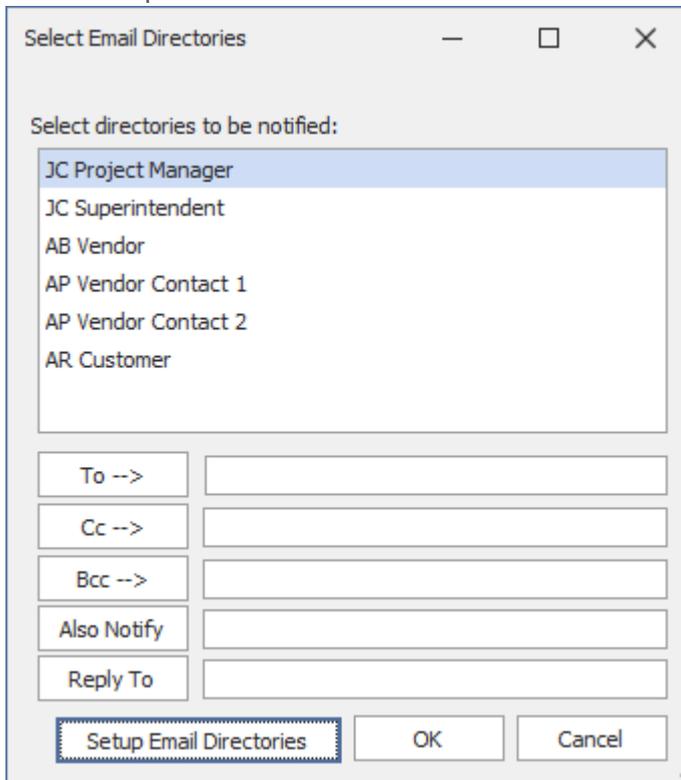
1. Select the desired MyAssistant Task in the main MyAssistant window and click "Open" in the ribbon
2. Click "Task Options" on the left side of the window that opens
3. Check the field next to the line "Separate email for each"
  - a. If the field says "Select...", then "Send Once Per" is not being used
  - b. If the field shows anything besides the word "Select...", then "Send Once Per" is being used

## If the Task is using "Send Once Per"

1. Click "Email" on the left side of the Task Setup window
2. Remove any Email Directories or typed email addresses from the [recipient](#) lines (To/Cc/Bcc)
3. Type the email address of the person who will review the emails in the To line
4. Click and drag the field being used in the "Separate Email for Each" section from the list in the bottom-right to the Subject line (if not there already). This will help differentiate the emails when they're received.
5. Click "OK" to close the Task Setup window
6. Click "Run and Send" in the ribbon of the main MyAssistant window to run the Task
7. Review the emails and their contents when delivered

### If the Task is not using "Send Once Per"

1. Click Email on the left side of the Task Setup window
2. Identify any Email Directories used on the Task (indicated by bracketed text in the recipient lines; like "[PR Employee]")
3. Click "Email Directory" in the ribbon
4. Click "Setup Email Directories" at the bottom of the window that opens



5. Select the Email Directory being used on the Task in the window that opens and click "Change"
6. Click "Next" on the first step of the window that opens
7. Note the values in the "Sage 300 CRE database record" and "Sage 300 CRE database field" at the top of the window
8. Click the X in the top-right to exit and not save any changes
9. Click "Close" to close the "Define Email Directories" window
10. Click "Cancel" to close the "Select Email Directories" window
11. Remove any Email Directories or typed email addresses from the [recipient](#) lines (To/Cc/Bcc)
12. Type the email address of the person who will review the emails in the To line
13. Click and drag the "Sage 300 CRE database field" from the "Sage 300 CRE database record" grouping from the list in the bottom-right to the Subject line (if not there already). This will help differentiate the emails when they're received.
14. Click "Task Options" on the left side of the Task Setup window

15. Click the dropdown next to "Separate Email for Each"
16. Choose the field that was listed in the "Sage 300 CRE database field" from the "Sage 300 CRE database record" grouping in the list
17. Click "OK" to close the Task Setup window
18. Click "Run and Send" in the ribbon of the main MyAssistant window to run the Task
19. Review the emails and their contents when delivered

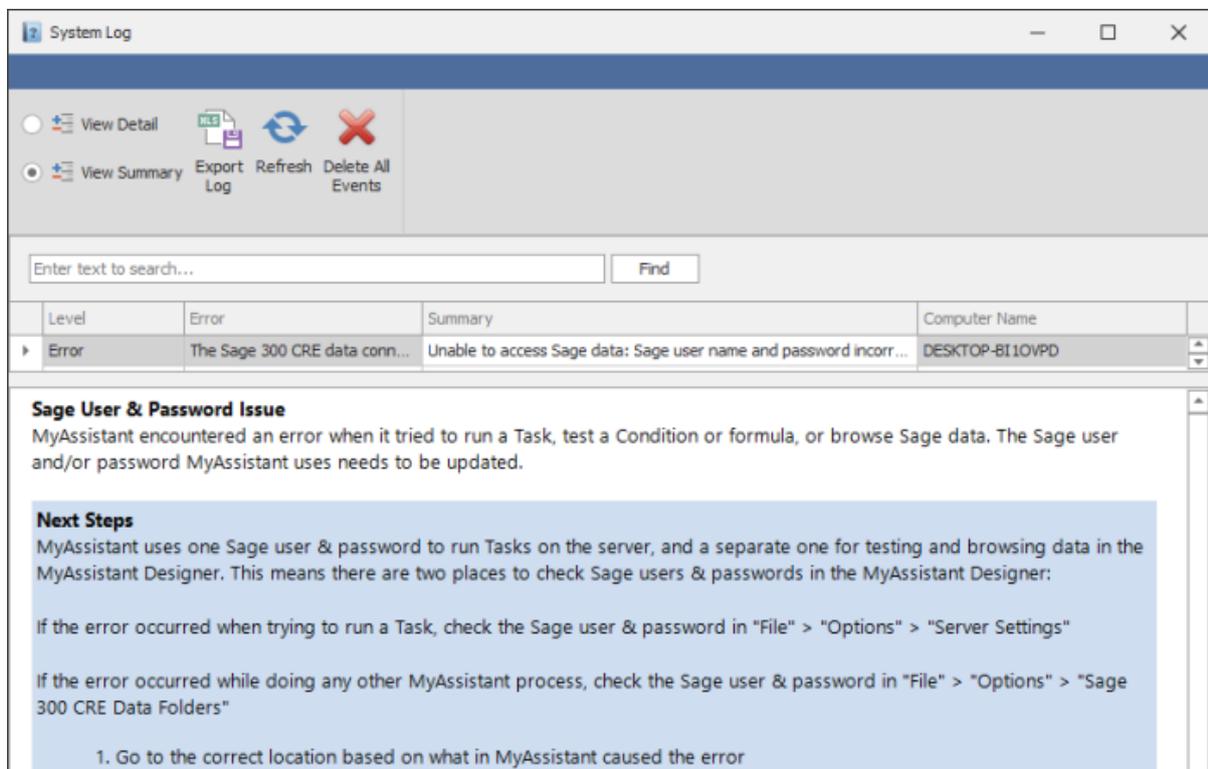
### **Revert a Task After Review**

1. To change a Task back after reviewing the emails and determining they're ready to send, perform the following:
2. Select the desired MyAssistant Task in the main MyAssistant window and click "Open" in the ribbon
3. Click "Email" on the left side of the window that opens
4. Remove the email address of the person who reviewed the emails
5. Re-add the recipients to the Task
  - a. Use the [Email Directory](#) button in the ribbon to re-add any Email Directories on the Task
6. If "Send Once Per" was not being used on the Task
  - a. Click "Task Options" on the left side of the window
  - b. Click the eraser icon on the far-right of the "Separate Email for Each" line
7. Click OK to close Task Setup

# Troubleshooting

## System Log

If an error occurs or if something may not be working correctly, consult the System Log that identifies and explains (in non-technical terms) what, if anything, happened. 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, the common issues can be resolved with the step-by-step instructions provided.

If someone else needs to review the log, export a copy by clicking the "Export Log" button in the ribbon.

# Reports

In some cases, an attached report sent by a MyAssistant Task may fail to run, or will run but not contain the correct information.

This section outlines some possible steps to check if a report is working correctly.

## Report runs, but wrong information

If a report is not producing the information expected, try the following:

1. Select the Task sending the report in the main MyAssistant window & click "Open"
2. Go to the Data Folders step (if available) and confirm the Task is set to run for the correct data folder
3. Go to the Email Step
4. Right-click on each report in the Attachments section (under the Subject line) and select "Report Options"
5. Confirm the prompts (if there) are filled out correctly to create a report or document with the desired information. This can be achieved by adding the report to the Sage Reports menu and running the report with the same prompts that are being passed in by MyAssistant.

## Report does not run/email isn't received

If an email with an attached report isn't received or if an error stating that an attached report didn't complete is received, try running the report in Sage on the server using the steps below. This can help identify why the report wasn't created and/or sent.

1. Click the to "File" menu button, click "Options" and select "Server Settings" in the MyAssistant Designer to find the Sage user & password MyAssistant is using to access Sage 300 information on the server
2. Identify the computer where the MyAssistant Server software is installed. This is the computer from which MyAssistant sends emails and creates attached reports.
  - a. If unsure about which computer has the MyAssistant Server software, look up the server named (just after the "\\") at the beginning of the Sage data folder path when opening a Sage application and choosing a data folder
3. Log on to the server identified in step 2 using Remote Desktop Connection or a similar program (depending on environment). If using Remote Desktop Connection, enter a Windows user & password with sufficient permissions to log on to the server.

**Note:** Depending on security settings, an administrator-level user may be required to log on to the server. Consult with IT for assistance.

4. Check MyAssistant's Windows Service responsible for creating & sending emails and reports:

- a. Click the Windows Start button and type "Services"
  - b. Select "Services" from the results
  - c. Scroll down to "ISDAdminSenderService" and check the "Log on as" column
    - i. If the service is set to "Log on as" an account called "Local System", update the service to run as the Windows user you used to log on to the computer
    - ii. If it's set to "Log on as" a Windows user other than "Local System", log off of the server and log back on as that Windows user (if not logged in as them already)
5. Log into Sage Desktop using the Sage user & password found in Step 1
  6. Open the application that has the (first) report on the Reports menu
  7. Run the report from the Sage menu
    - a. If the (first) report attached to the Task is not on the Sage Reports menu, add it
    - b. Run the report from the menu with the same values being used in the report prompts in MyAssistant
  8. If the report fails, work with whoever designed the report to update it
    - a. If the report works when running it from the Sage menu, remove the report from the MyAssistant Task and re-attach it using the Sage Report button in the Email step of Task Setup
  9. Repeat for each report on the Task
  10. Re-run Task after all reports have been updated
  11. If the Task still does not work, consult the [System Log](#) or consider contacting your local consultant or Sage Support

# Can't Find Information on a Task

When creating or modifying a Task, sometimes not all of the desired information is accessible or easily found. The most common causes are:

## Custom Fields & Descriptions not imported

When field descriptions are changed or custom fields are created in Sage, MyAssistant needs to be made aware of the changes. To do so, the "Import Sage Customizations" process must be run:

1. Open the MyAssistant Designer
2. Click "File" and select "Options"
3. Click "Server Settings" on the left side of the window that opens
4. Click "Import Sage Database Customizations" near the top-right of the window
5. If MyAssistant is monitoring multiple Sage data folders, select which data folder's custom fields and descriptions will be imported. If MyAssistant is monitoring one Sage data folder, this step will be skipped.

**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.

6. Click "OK" in the bottom-right to close the window once the import is complete
7. Click "File" and select "Restart Run and Send"
8. Click "OK" on the message that appears
9. Close and reopen MyAssistant -- the information should now be accessible

## Information Not Accessible (Data Relationships)

When creating a MyAssistant Task, one of the first steps is to identify what the Task will send [a list of](#), [a spreadsheet of](#), or what Sage record the Task will use to [create a mailing list](#). The Sage record selected becomes what's called the "Driving Record". After a "Driving Record" has been selected, MyAssistant automatically filters available information on the Task to Sage records that have a "one-to-one relationship" with the Driving Record.

A "one-to-one" relationship means that one item exists in the other Sage record for each one of the items in the Driving Record. For example, every JC Cost Code is tied to one JC Job. This means that if a Task has a Driving Record of "JC Cost Code", information on the JC Job record can be added/used on the Task. This means there is a one-to-one relationship going from the JC Cost Code to the JC Job.

However, the inverse is not true: one JC Job could have multiple Cost Codes, so there is a "one-to-many" relationship going from the JC Job to the JC Cost Code. This is why the JC Cost Code record is not available when a Task's Driving Record is JC Job.

Depending on the Task and the information that needs to be accessed, there are two possible solutions to this issue:

1. **Create a new Task with a new Driving Record:** The Driving Record on a Task cannot be changed once a Task has been activated. Instead, create a new Task with a different driving record that can access all desired information
2. **Create a MyAssistant Formula:** Depending on the information being looked up, another potential solution is to create a [MyAssistant Formula](#). This is a viable option when a one-to-one relationship between records does not exist, but only one piece of information needs to be looked up (for example: looking up the Project Manager name on the PJ Job Contacts List when the driving record in PJ Job).

## Glossary

**MyAssistant Task:** [Individual processes](#) in Sage MyAssistant that look up information based on selected criteria, then send emails based on what's found.

**Condition:** The [part of a MyAssistant Task](#) that determines what is being looking up in Sage, as well as the criteria that information has to meet. Similar to the "Conditions" button found on Sage reports and Sage Inquiries.

**Driving Record:** Set in the "What to Send" step, the Driving Record is what a Task will send a [list of](#), a [spreadsheet of](#), or what Sage record the Task will use to [create a mailing list](#). The Driving Record also controls what other Sage information can be accessed to include in the Condition, the Email Step, or which Email Directories can be used on a Task.

**Operand:** [Part of each line of a Condition](#) that controls how the value in a Sage field or MyAssistant Formula will be compared to a specified value, or the value in another Sage field or MyAssistant Formula.

**Email Directory:** A [way to look up email addresses](#) entered in Sage and associate them with related Sage information. Email Directories are used on Tasks to [send each recipient only their information](#).

**Spreadsheet Template:** Attached to a Task to [define the content and layout](#) of spreadsheets generated and sent attached to an email. Spreadsheet templates must be used on Tasks because the number of items that need to be included in a spreadsheet may change each time a Task is run.

**Notifications:** The all-encompassing term for items found by a Task when successfully ran. For example: one Task may run and find 20 JC Jobs that met its criteria, while another Task ran and found 20 AP Invoices that met its criteria. In this case, each Task has 20 notifications.

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