# MyAssistant for Sage

## Timberline Office - Task List

### Service Management

**Parts - Inventory**
- Purchase Order Items where the quantity received is less than the quantity ordered
- Purchase Order Items without receipts after the date promised
- Purchase Orders for Work Orders with no receipts after 20 days
- Purchase Order Items where the quantity received is less than the quantity invoiced
- Purchase Orders linked to a Work Order and are backordered
- Purchase Orders ready to be sent to Vendors
- Parts where the quantity on hand is less than the minimum stock quantity
- Parts with a negative quantity on hand

**Service Agreements**
- Agreements expiring in the next 30 days or in the last 120 days
- Parts needed for PM tasks scheduled for the next month
- Agreement Quotes expiring in the next 30 days
- Active Leads not contacted in specified days
- Agreements that expired in the last 30 days and were not renewed
- Agreements that have expired in the last 30 days with an unbilled balance
- Customers who have not purchased an agreement in 12 months

### Setup - Other

- Employees not set up to send time to Payroll
- Employees set to send time to payroll and missing needed settings
- Service Sites missing a sales person
- Service Sites that have been newly added
- Vehicles due for an oil change

### Work Orders

- Work Orders completed this week
- Work Orders entered yesterday and assigned as Urgent or High priority
- Work Orders entered today that have a specified Problem code
- Work Orders invoiced in the last 5 days
- Work Orders missing a sales person
- Work Orders not scheduled
- Work Orders that have been canceled and have an open PO
- Work Orders that have been completed and not billed
- Work Orders that have not been assigned to a technician
- Work Orders waiting on parts
- Work Orders with costs and flagged as non-billable
- Work Orders Quotes that expired in the last 7 days
- Work Orders without a job number
- Work Orders without a PO number
Invoices ready to be sent

Work Orders completed and not billed