

# Service management

Streamlining your control over service operations, Sage 300 Construction and Real Estate (formerly Sage Timberline Office) Service Management software integrates with other applications for better communication between customers and your organization's dispatchers, technicians, and accounting staff.



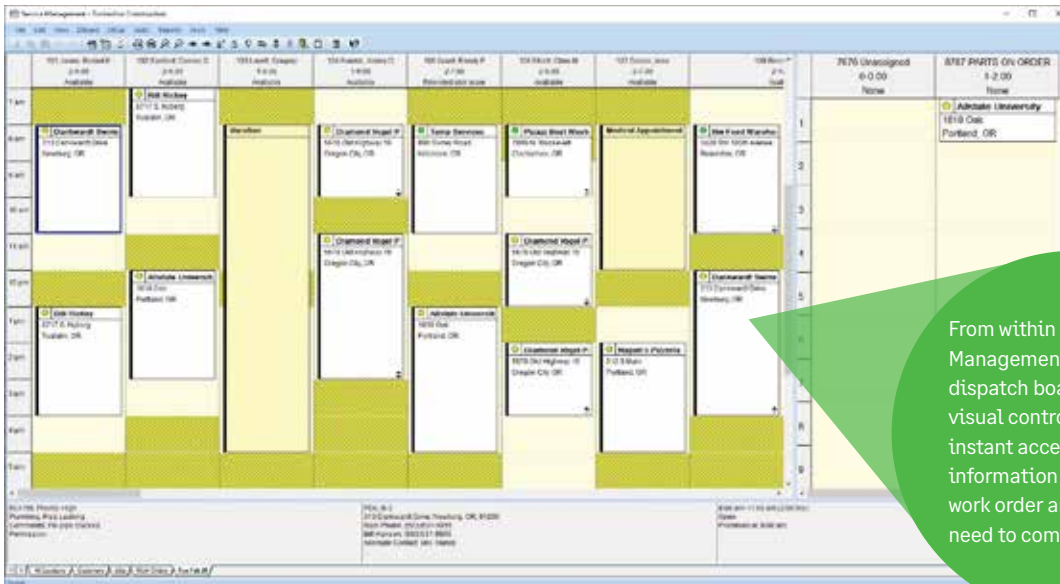
Ready access to Accounts Payable, Accounts Receivable, Job Cost, Payroll, Inventory, Purchasing, and General Ledger information enables you to track and streamline your response to service needs.

Service Management simplifies service call dispatching, field technician management, and billing. You're able to see the status of any service call including the time the call is scheduled, the type of service to be performed, and the technician assigned to perform the service.

Information on vendors, invoices, purchase orders, and other financial details are entered into your system only once, eliminating redundancy and potential errors. Add-on modules further improve your operation by putting you in complete control of field purchasing, service agreements, warranties, as well as preventive maintenance.

## Benefits

- Easily lower response times for service dispatching.
- Eliminate duplicate data entry and reduce the risk of potential errors.



### Dispatching features and efficiencies

- Display as many as 450 service calls and 48 technicians at one time on the easy-to-use dispatch board.
- Monitor technician availability, workload, and scheduling conflicts through the dispatch board's enhanced visual controls.
- Retrieve a customer's service history, geographic location, and accounts receivable information.
- Sort assignments by date and time and prioritize service calls by estimated start and finish times.
- Look up parts by item code, category, or description.
- Track material runners and materials on order.
- Enter a purchase order while working inside the dispatch board.
- Drill down for access to additional information about specific service calls.
- Attach technician, customer, and equipment notes to work orders.
- Pull up a list of installed equipment including detail such as model number, service history, or warranty length.
- Check details of warranty types and service agreement coverage.
- Perform searches for existing work orders.
- Automatically carry over unfinished work orders to the next day.
- Let customers know exactly when technicians were dispatched using time stamps.
- Map out each technician's schedule for up to five weeks.
- Call up technician records, status, pager numbers, and more.
- Use time stamps to create an audit trail of actual hours worked and cross check them against technician time cards.
- Track non-work-order time such as training, shop time, or vacation.
- From the dispatch board, perform skill checks by technician.
- Track what inventory was used on each work order.

## **Billing features and efficiencies**

- Automate pricing with small job fixed rate pricing, flat rate pricing, or markup/discount.
- Bill multiple work orders based on one invoice.
- Bill customer accounts or individual service locations.
- Implement a work order approval process prior to billing.
- Create a variety of invoice formats to suit your purposes.
- Invoice work orders on the fly.
- Set up unlimited rate tables for labor, materials, equipment, and other costs per customer.
- Establish special discounts by customer.
- Customize call types with their own labor rates.
- Price travel by trip charge or miles.
- Automatically price parts based on item or mark-up file.
- Add miscellaneous charges.

Add the following applications to Sage 300 Construction and Real Estate Service Management to enhance service call dispatching, field technician management, and billing. Get the control you need for field purchasing, service agreements, warranties, and preventive maintenance to make a positive impact on your bottom line.

## **Service inventory**

Sage 300 Construction and Real Estate Service Inventory puts all the details at your fingertips so you can easily track and maintain an accurate perpetual inventory. Get immediate insight into your stock levels and all aspects of material management so you can:

- Perform accurate physical counts.
- Automatically update inventory at time of invoicing.
- Generate detailed inventory transactions needed to restock service vehicles.
- Receive “automated alerts” that help keep on top of needed parts and inventory.

## **Service messaging**

Instantly communicate with technicians in the field and save travel time with the ability to electronically transmit work order details and updates. Use Sage 300 Construction and Real Estate Service Messaging to:

- Send work order details immediately to technicians with alphanumeric pagers.
- Update dispatch board with work order status and changes from the field.
- Store work orders so you can get valuable insight into historical data and service trends.

## **Service agreements and preventive maintenance**

Get a 360° view of your service agreements and preventive maintenance schedules so you can maximize profitability. Sage 300 Construction and Real Estate Service Agreements and Preventive Maintenance enables you to:

- Automatically schedule recurring maintenance and renew contracts before they expire.
- Track additional revenue resulting from service agreement calls.
- Proactively monitor and determine the profitability of your service call operations.

## **Service purchasing**

Sage 300 Construction and Real Estate Service Purchasing links work orders, purchase orders, and purchases made by service technicians in the field so you get better visibility and tighter control. Improve bottom line results with the ability to:

- Ensure accuracy by matching vendor invoices to purchase orders.
- Update inventory, parts costs, and more automatically.
- Improve management control over service-related purchases.
- Get notified and cancel service-related POs due to a canceled work order.





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