

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.

The screenshot displays a software interface titled "Service Management - Timberline Construction". It features a grid-based dispatch board with columns for technicians and rows for time slots. Each cell contains details about a service call, including the customer name, address, and technician assigned. A green callout bubble points to a specific service call for "Burns Restaurant" at 1540 Maple Street, Portland, OR, which is assigned to a technician.

Time	101 Robert E. Jones 3-8:00 Available	102 Sanford Dennis G 2-8:00 Available	103 Lovett Gregory 2-9:00 Available	104 Franks Jimmy D 3-9:00 Available	105 Grant Randy P 1-9:00 Extended sick leave	106 Elliott Chris M 2-9:00 Available	107 Garcia Jose 1-9:00 Available	108 Brock Terry W 3-9:00 Available	109 Kelly Matthew P 2-7:00 Available	Unassigned 0-0:00 None
7 am		Dankwardt Swim 313 Dankwardt Drive Newburg, OR		City of Oak Hills 798 N. 34th Street Oak Hills, OR				Pizazz Best Waste 7899 N. Roosevelt Clackamas, OR	City of Oak Hills 798 N. 34th Street Oak Hills, OR	
8 am	Allstate University 1818 Oak Portland, OR		Burns Restaurant 1540 Maple Street Portland, OR		Sick Leave	Futterton Lumber 3450 Agency Road Portland, OR	Training			
9 am										
10 am										
11 am	Doctor's appointment			New Food Warehouse 3428 SW 185th Avenue Beaverton, OR					Burns Restaurant 1540 Maple Street Portland, OR	
12 pm		Debi Bronson 58923 E 14th Street Canby, OR						Diamond Vogel Pt 5678 Old Highway 16 Oregon City, OR		
1 pm	Bill Rickey 8777 S. Nyberg Tualatin, OR		Napoli's Pizzeria 312 S Main Portland, OR							
2 pm			Memorial Civic Ce 678 River Drive Beaverton, OR			Tri-Tech Lab 556 Pacific Highway Belmont, NC				
3 pm										
4 pm										
5 pm										

#23174, Priority: Low
Service: Pipe Leaking
Comments: Sprinkler system pipes leaking.
Permission:

POX
1540 Maple Street, Portland, OR, 97123
Main Phone: (503)448-0095
Frank Burns: (503)448-0095

11:00 am-3:00 pm (4.00 hrs)
Open
Promised at: 11:00 am

File Help, press F1

00: C:\P NUM 02/26/13

From within the Service Management easy-to-navigate dispatch board with enhanced visual controls, you have instant access to the service information surrounding each work order and the tasks you need to complete.

Sage 300 Construction and Real Estate

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.

Sage 300 Construction and Real Estate

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.

For more information, contact your Sage business partner or customer account manager at 800-858-7095.

About The Sage Group, plc

We provide small and medium-sized organizations and mid-market companies with a range of easy-to-use, secure, and efficient business management software and services—from accounting, HR, and payroll to payments, enterprise resource planning, and customer relationship management. Our customers receive continuous advice and support through our global network of local experts to help them solve their business problems, giving them the confidence to achieve their business ambitions. Formed in 1981, Sage was floated on the London Stock Exchange in 1989 and entered the FTSE 100 in 1999. Sage has millions of customers and circa 13,000 employees in 23 countries covering the UK & Ireland, mainland Europe, North America, South Africa, Australia, Asia, and Brazil.

For More Information:

CPA Technology
How does your software measure up?

15 Cynwyd Rd, 2nd Floor | Bala Cynwyd, PA 19004
tel: (610) 862-0042 w: cpatechnology.com

Fred Gaasche
Director of Business Development
(610) 862-0039
fwg@cpatechnology.net