

Sage Timberline Office

Service Management

Streamlining your control over service operations, 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. You can even track and manage your service vehicles through GPS integration with @Road Web-based mapping services.

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.
- GPS integration allows you to see where your service vehicles are at all times.

The screenshot shows the 'Service Management - Comm-Spec' application window. The interface is divided into several sections:

- Top Bar:** Contains menu options (File, Edit, View, DBoard, Setup, Tasks, Reports, Tools, Help) and a toolbar with various icons.
- Dispatch Board:** A grid with columns for technicians (105 - Grant, Randy P; 108 - Brock, Terry W; 112 - Turner, Keith A; 119 - Brooks, Tom B; 134 - Becker, Laurie B) and their availability. The rows represent time slots from 7 am to 1 pm. A 'NatureWay Food Store' call is assigned to Terry Brock at 8 am. A context menu is open over the 'Allstate Univer' call at 11 am, listing actions like 'Assignment Properties', 'Work Order Properties', 'Location Properties', 'Location View', 'Send Page', 'Invoice Proof', 'Enter Purchase Order', 'Copy Assignment', 'Spk ECard', and 'Delete'.
- Right Panel:** A list of unassigned calls, including 'NatureWay Food Store Lc', 'Oregon Health Science U', 'Burns Restaurant', and 'Cordova Middle School'.
- Bottom Panel:** A status bar with navigation tabs for 'All Locations', 'Customers', 'Jobs', 'Thu Jun 10', and 'Sales'. It also contains a help message: 'For Help, press F1'.

◀ From within Service Management's 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.

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, work load, 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, UPC 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.

Service Management is a part of Sage Timberline Office, fully integrated operations and financial software for construction and real estate professionals.

Sage Timberline Office

Service Agreements/Preventive Maintenance

As an add-on to our Service Management software, Service Agreements/Preventive Maintenance keeps you firmly in control of your preventive maintenance business by tracking service agreement dates and maintenance schedules.

It also prompts you with agreement renewal dates and gives you the ability to determine the profitability of your service call operations.

BENEFITS

- Easily stay in tune with all aspects of your agreements
- Quick access to all technicians and appointments set

The screenshot displays the 'Service Management - Timberline Construction' software interface. The top menu bar includes File, Edit, View, DBoard, Setup, Tasks, Reports, Tools, and Help. Below the menu is a toolbar with various icons. The main window is divided into several sections:

- Customer (HORNER):** Horner Laboratories, 4523 Nimbus Parkway, Portland, OR 97229. Area: PDX.
- AR Customer (HORN):** Horner Laboratories, 4523 Nimbus Parkway, Portland, OR 97229. Current Amount: 0.00.
- Agreement Summary:** Mary Abrahms (503)555-1111, Main phone: (503)555-1111, Main fax: [blank].
- Agreement Table:**

Agreement #	Status	Coverage Period	Technician	Type	Total	Invoiced	Invoiced Amt	Renewal
6	Active	4/15/2001 to 4/14/2002	137 Black: Donald M	12 Month Std. Agreement	1050.00	1 of 3	350.00	

A context menu is open over the first row of the table, showing options: Properties, Preview, Preview List, Renewal (with a right-pointing arrow), Activate Quote, Cancel, Create Invoice, Agreement Profitability Report, and Equipment Profitability Report.

At the bottom of the window, there is a breadcrumb trail: All Locations > Customers > Jobs > HORNER. The status bar at the very bottom reads 'For Help, press F1' and 'NUM'.

◀ From a customer's service agreement you have instant access to profitability reports as well as information associated with the agreement.

Service agreement and maintenance tracking

- Track service agreement start, end, and expiration dates.
- Display preventive maintenance scheduled for next 12 months by technician on an easy-to-read preventive maintenance board.
- Program the system to prompt you when service agreements are due for renewal.
- Account for additional revenue resulting from service agreement calls.
- Assign sales and costs to individual customer equipment.
- Override labor rates by warranties or service agreements.
- Perform multiple or periodic billings.
- Price service by total agreement, by piece of equipment, or at time of billing.
- Maximize profitability by amortizing service agreements.
- Schedule recurring maintenance by date range.
- Generate report detailing parts needed for each job by scrolling through parts lists and clicking on the appropriate item.
- Create multiple tasks by customer or equipment.
- Use agreement and equipment profitability reports to better monitor your operations.

Service Agreements/Preventive Maintenance is a part of Sage Timberline Office, fully integrated software created to streamline work and connect the people you depend on to build your business.

Sage Timberline Office

Service Purchasing

Added to Sage Timberline Office's core Service Management software, Service Purchasing provides tight management control over service-related purchases.

Parts purchases required by service technicians are linked by this software to your work orders and purchase orders. You're able to easily track and quickly match vendor invoices to purchase orders and, as needed, automatically update inventory, parts costs, and more.

Purchase order control

- Ensure accuracy by matching vendor invoices to purchase order.
- Automatically update inventory part costs.
- Assign purchase order numbers to the system automatically or manually.
- Attach purchase orders to fixed-price jobs in order to track costs.
- Credit purchase orders for core returns and RMAs.
- Automatically attach purchase orders to work orders and invoices.

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BENEFITS

- Increase profitability with more accuracy from parts purchases made in the field
- Quickly match vendor invoices to purchase orders

Type	Description	Product	On Order	Unit	Unit Price
Parts	FAN-3456 Fan Unit	Parts	1.00	Each	40.0000
Work Order	23172 Debi Bronson				
Parts	FREON Freon, 1 Pint	Parts	5.00	Each	4.0000
Work Order	23172 Debi Bronson				

Amt. On Order: 60.00
Amt. Received: 0.00

◀ Keep tight control on purchasing by tying each purchase order to its related work order and customer.

Sage Timberline Office

Service Inventory

Added to the Sage Timberline Office's core Service Management software, Service Inventory makes it easy to maintain an accurate perpetual inventory.

Service Inventory enables you to automatically update inventory at the time of invoicing, track minimum and maximum inventory levels, perform accurate physical counts, look up AKA part numbers, and more.

Inventory control

- Automatically update inventory at time of invoicing.
- Track minimum and maximum inventory level.
- Perform accurate physical counts.
- Look up AKA part numbers with a single mouse click.
- Track serialized parts.
- Automatically generate customer equipment information from invoicing.
- Track inventory carried on trucks and create stocking lists for each truck.
- Generate detailed inventory transactions, e.g. produce a re-stocking list of parts used per truck.

Service Inventory is a part of Sage Timberline Office, fully integrated software created to streamline work and connect the people you depend on to build your business.

BENEFITS

- Important inventory data available at the touch of a button.
- Easily track all inventory levels.

The image shows two overlapping software windows. The background window is titled 'Fill Restocking List - General' and contains the following fields: Description (Restock Location), Date (1/09/2003), Source (Stocking Location selected, Main Stock selected), Destination (Stocking Location selected), and checkboxes for 'Transfer entire source location' (unchecked) and 'Transfer will apply to outside' (checked). The foreground window is titled 'Fill Restocking List - Register' and contains a table with columns 'Part Number' and 'Quantity or S/N'. The table lists the following items:

Part Number	Quantity or S/N
12 THHN GN #12 THHN Green Wire	12.00
12/2 MC 12/2 MC Cable	12.00
500 BOX 500 amp electrical box	2.00
GRC 1/2" GRC Conduit 1/2"	3.00
	Quantity or S/N

Buttons at the bottom of the foreground window include '< Back', 'Finish', 'Cancel', and 'Help'.

◀ Easily generate the inventory transactions needed to restock service vehicles with parts used