



## Service Management

Service Management helps you communicate more effectively with customers by giving you quick, ready access to vital service information. Optional add-on modules further improve your operation by putting you in complete control of field purchasing, service agreements and warranties, as well as preventive maintenance. What's more, a smooth interface with Gold's Accounts Payable, Accounts Receivable and General Ledger applications streamlines accounting by eliminating duplicate processes, as AP vendor information, invoices, purchase orders, and other financial details are entered only once into the system.

Service Management's easy-to-navigate dispatch board puts dispatchers in complete command of the work order process. Each work order is represented on the board via an ECard that summarizes the reason for the service call, the location of the call, and the appropriate contact person. Dispatchers can instantly determine the status of a call, which technician is assigned to it, and the other projects the technician is working on. Onscreen color-coding lets dispatchers easily determine the urgency of each call. If necessary, dispatchers can re-prioritize work orders, or re-assign a technician by simply dragging and dropping ECards from one place to another on the dispatch board. Dispatchers can also drill down on ECards in order to access work order history, equipment availability, accounts receivable balances, account history, job status, sales lead information, notes and more.

So that you can see exactly how your service operation is functioning, Service Management contains more than 80 reports, including Technician Productivity, Profitability by Job, Customer Equipment Analysis, Gross Profit by Work Order, Gross Profit by Technician, Gross Profit by Customer, Estimate vs. Actual Costs, and more. You can also use Crystal Reports™ to create your own reports, or modify existing ones (Crystal Reports must be purchased separately).

Following is a detailed list of features Service Management offers your company that will help you provide service more efficiently and profitably.

### Dispatching

- Display as many as 480 service calls and 50 technicians at one time on an easy-to-use dispatch board
- Immediately determine status of a service call with at-a-glance color coding on dispatch board
- Instantly retrieve a customer's service history, geographic location and accounts receivable information
- Look up parts by item code, UPC code, category or description
- Place customers on credit hold
- Easily re-prioritize work orders by dragging and dropping ECards from one place to another on dispatch board
- Drill down to retrieve additional information about specific service calls with Tool Tips and right mouse clicks
- Attach technician, customer and equipment notes to work orders
- Change view options on dispatch board
- Pull up list of installed equipment (such as model number, service history or warranty length)
- Check details of customer's warranty and service agreement coverage
- Search for existing work orders
- Automatically carry over unfinished work orders to next day
- Tell customers exactly when technicians were dispatched with ECard stamping

	0-Unassigned 2-5.00	200-Elgin 3-7.00	300-Horsh 2-9.00	14-Isram 2-9.00	100-Kokura 3-8.00
→	Gateway Technical Se 11012 S. Quivera Roa Dallas, TX	Comfort Service Comp 1818 Oak Tampa, FL	Nate Olson 917 Main Seattle, WA	Discount-Mart 1500 Hwy 90 North Missoula, MT	Harold McKenzie 417 W. Oak Olathe, KS
↘	Jim James 909 Havencrest Circle Overland Park, KS	Data Entry Specialists 400 Megabyte Road San Jose, CA	Marvin Stonacek 719 S. Maple St. Louis, MO	Bill Hanson 1409 W. 212th Los Angeles, MI	Brookfield Building 6000 Brookfield Ave. Kasas City, MO
3		Beaver Laboratories, I 9719 Ward Parkway Kansas City, MO			Nate Olson 917 Main Seattle, WA
4					
5					
<b>Commercial Pm - PM Service</b> Comments:			<b>Promised: 11:00 am, Reassigned 12:52 pm</b> (408) 222-2222 Mary Davidson (FAX) 222-2223 Fred Buchanan 63210 #18		

Customer Lookup Work Order Lookup Tue May 02

For Help, press F1

Work orders are graphically depicted on Service Management's easy-to-navigate dispatch board in the form of an ECard, which includes such information as reason for call, job status, customer location and more.

- Use ECard time stamps to create audit trail of actual hours worked and cross-check them against technician time cards
- Map out each technician's schedule for up to four weeks
- Quickly and easily call up technician records, status, pager numbers and more
- Track skills by technician

#### Billing

- Automate pricing with small job fixed-rate pricing, flat rate pricing or markup/discount
- Set up unlimited rate tables for labor, materials, equipment and other costs
- Establish special discounts for each 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

#### Additional Features

- Track fleet costs and maintenance
- Take advantage of online printable help
- Simplify workflow with wizards that walk you step-by-step through each process
- Tailor screens with proportional fonts that allow for more words in less space
- Further customize screens with software's shrink and expand capabilities

#### Optional Modules

Make Service Management an even more comprehensive tool with these optional add-on modules.

##### Service Purchasing

- 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
- Easily credit purchase orders for core returns and RMAs
- Automatically attach purchase orders to work orders and invoices

##### 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 single mouse click
- Easily track serialized parts
- Automatically generate customer equipment from invoicing
- Track truck inventory and create stocking lists for each truck
- Generate detailed inventory transactions (for example, produce a re-stocking list of parts used per truck)

- Import information from Trade Services to create standard part and flat pricing lists
- Perform and maintain accurate perpetual inventory

#### *Service Agreements/Preventive Maintenance*

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

#### *Paging*

- Transmit work order details instantly to technicians equipped with alphanumeric pagers
- Increase efficiency and reduce technician travel costs
- Log each page for historical reporting and tracking purposes
- Re-notify technicians by automatically sending second page with simple double click
- Choose from 40 different fields to customize information sent to technician

**Service Management** is one of many applications offered by the Gold Collection, Timberline's fully integrated accounting software system for construction and property management firms. Built for Microsoft® Windows® 32-bit operating systems, and featuring client/server SQL database technology, Gold gives you the tools to make better decisions, increase productivity and build profits.

*Your Timberline Solution Provider:*

TIMBERLINE.