

# Sage Timberline Enterprise



## Service Management

When it comes to managing your service and preventative maintenance operations, the more simplified the process, the more efficient and cost effective your team can function. **Sage Timberline Enterprise Service Management** provides you with everything you need to keep your technicians, dispatchers, and service managers intuitively connected to the back office while supplying them with the up-to-date information they need to maximize the quality of service your customers deserve.

Through a simple yet sophisticated multi-day dispatch board, Service Management reduces your steps to get work done so you can instantly streamline service calls, efficiently manage field technicians, and quickly process bills all from within a single, easy-to-use interface. Gain visibility into the status of any service call at any time, find out the type and scope of service being performed, and quickly identify information your technicians need to complete the service. Service Management transforms complex tasks into well-managed, efficient service calls.

Better still, with Service Management you only have to enter information once for customers, vendors, invoices, purchases orders, and many other financial details, so duplicate work and the potential for errors is virtually eliminated. Sage Timberline Enterprise also provides you with total control over service agreements, field time capture, materials requisition, preventative maintenance, warranties, and much more.

### Work Order Management

- Quickly initiate a quote or work order while on the phone with the customer.
- Implement preventative maintenance renewal processes and effectively manage vendor and provider warranties.
- Create work orders and schedules with flexibility and ease.
- Easily create agreements that define terms, price, work schedule and billing schedule from one convenient location.
- Effortlessly create preventative maintenance work orders automatically.
- Perform and track service work against jobs with full integration to Job Management.
- Initiate service work/requests online.
- Easily create work order quotes using standard items and then easily convert to an active work order.
- Quickly procure materials from Purchasing and Inventory.
- Track what inventory was used on each work order.
- Look up parts by item code, UPC code, category, or description.
- Attach technician, customer, and equipment notes to work orders.
- Capture labor (hours worked) for service work orders and post that time to Payroll.

### BENEFITS

- Save time and gain complete control over service and maintenance work with a state-of-the-art dispatch system
- Eliminate duplicate data entry with tight integration to accounting, purchasing, inventory and job management applications
- Easily create, modify, and monitor service and preventative maintenance agreements

## Dispatching

- Assign and schedule technicians based on defined labor criteria or specific skill sets.
- Monitor technician availability, work load, and scheduling conflicts through enhanced visual controls on the dispatch board.
- Take advantage of multiple user-defined layouts (fonts, sizes, colors, etc.).
- Drag and Drop items across monitors.
- Retrieve customers' accounts receivable information, service history, and geographic location.
- View and maintain ongoing work with a highly productive multi-day, multi-view dispatch board.
- Track non-work order time such as training, shop time, or vacation.
- Easily execute skill checks by technician from the dispatch board.
- Customize dispatch boards for individual users based on department, center, region, etc.
- Drag and drop scheduling and rescheduling with ease.
- Sort assignments by date and time, and prioritize service calls by estimated start and finish times.
- Enter purchase orders while working inside the dispatch board.
- Place service calls on hold.
- Dispatch technicians using mobile devices.
- Alert dispatchers on overdue items, unfinished work, items on-hold that need follow up, and urgent calls.
- Drill down for access to additional information about specific service calls.
- Let customers know exactly when technicians were dispatched using time stamps.
- Map each technician's schedule for as long as needed.
- Use time stamps to create an audit trail of actual hours worked and cross-check them against technician time cards.
- 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.
- Automatically carry over unfinished work orders to the next day.

## Trip Capture and Billing

- 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.
- Quickly capture and bill for work completed.

- Billing for agreements is automated.
- Capture, review, and bill for work performed and make adjustments at any point; even after invoice.
- Automate pricing with small job fixed-rate pricing, flat rate pricing, or markup/discount.
- Bill multiple work orders based on one invoice.
- Create a variety of invoice formats to suit your needs.
- Bill customer accounts or individual service locations.
- 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.
- Capture payroll time in the field.
- Enable trip capture in the field using mobile applications.
- Easily make adjustments to invoiced work orders.

## Workspaces

- Apply filters to display exactly the information you want to see.
- Search for specific information using exact match or partial match criteria.
- View stored information on the screen through an interactive service management inquiry.
- Drill down from summary information to supporting detail.
- Perform tasks with the shown information.

Service Management is a part of Sage Timberline Enterprise, a tightly integrated business management solution designed to simplify the complex needs of service and specialty contractors.