

Timberline Service Management



End-to-end Field Service Management Program:

Job Management (logging, purchasing, invoicing, accounting)

Contract Management (periodic scheduling, special pricing)

Technician Management (costing, payroll integration, competencies)

Technician and Periodic Service Scheduling

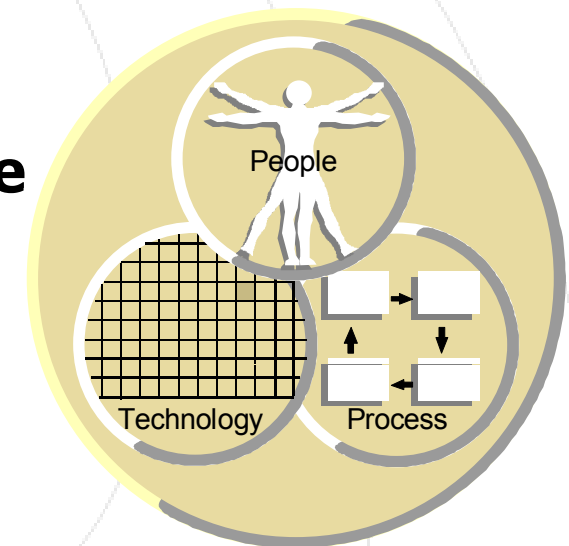
SMS and PDA access (get information to those who need it)

Flexible Reporting

Fast to learn and easy to use.

Streamline your field service processes using a system that matches your field service workflow.

Have the information at your fingertips to make immediate critical service decisions.





An integral module of **Sage Timberline Office**, **service management fully integrates to streamline your workload and connects the people you depend on to operate your business to greater profitability.**

SAGE TIMBERLINE OFFICE

ACCOUNTING

PAYROLL

ESTIMATING

PROJECT MANAGEMENT

PROCUREMENT

PROPERTY MANAGEMENT

SERVICE MANAGEMENT

PRODUCTION MANAGEMENT



Sage Timberline Service - fully integrated with accounting, accounts payable, vendor information, invoices, purchase orders, and other financial details. Enter information once, automating your information processes.

Easily manage multiple locations, multiple divisions and complex accounting requirements with ease.

Make your service division a profit center.



**When logging new jobs all information is at your finger tips:
Customer Balances,
Work Order History,
Equipment lists & service schedules,
Pricing Agreements
Past Invoices.**

Customer (BURNSREST)
Burns Restaurant
1540 Maple Street
Portland, OR 97123
Area: PDX

Frank Burns
(503)446-0095
Main phone: (503)446-0095
Main fax:

AR Customer (BURNS)
Burns Restaurant
1540 Maple Street
Portland, OR 97123

Balances			
Current	0.00	> 90 days	0.00
> 30 days	0.00	> 120 days	0.00
> 60 days	375.00	Outstanding	375.00

Properties
New work order
(Unfiltered)
Filters

Create New Work Order

Work Order #	Status	PM?	Sched. Date	Run Date	Technician	Call Type	Problem	Total	Total Billed	Customer/CSR Comments	Alt Work Or
23175	Invoiced		3-05-2001	3-05-2001	134 Becker; Laurie B	Electrical	No Power	375.00	375.00	No power in kitchen - customer checked breaker.	
23174	Open		2-06-2007		7676 Unassigned	Service	Pipe Leaking	0.00	0.00	Sprinkler system pipes leaking.	

Logging new jobs ctd.

New Work Order - General [?] [X]

Call type	Service		
Call date	2-07-2007	Call time	10:54 AM
Equipment to service	NONE		
Service agreement	NONE		
Problem	No cooling		
Rate sheet	Normal working hours		
Location comments	Air Conditioner is no longer working. Blowing hot air.		
Sales lead	NONE		
Lead source	Newspaper Ads		
Salesman	NONE		

< Back Next > Finish Cancel Help

When taking the details of the job, suggestive drop down lists not only streamline the logging process but the workflow of the call throughout your administration team for timely dispatch.

Scheduling your technicians

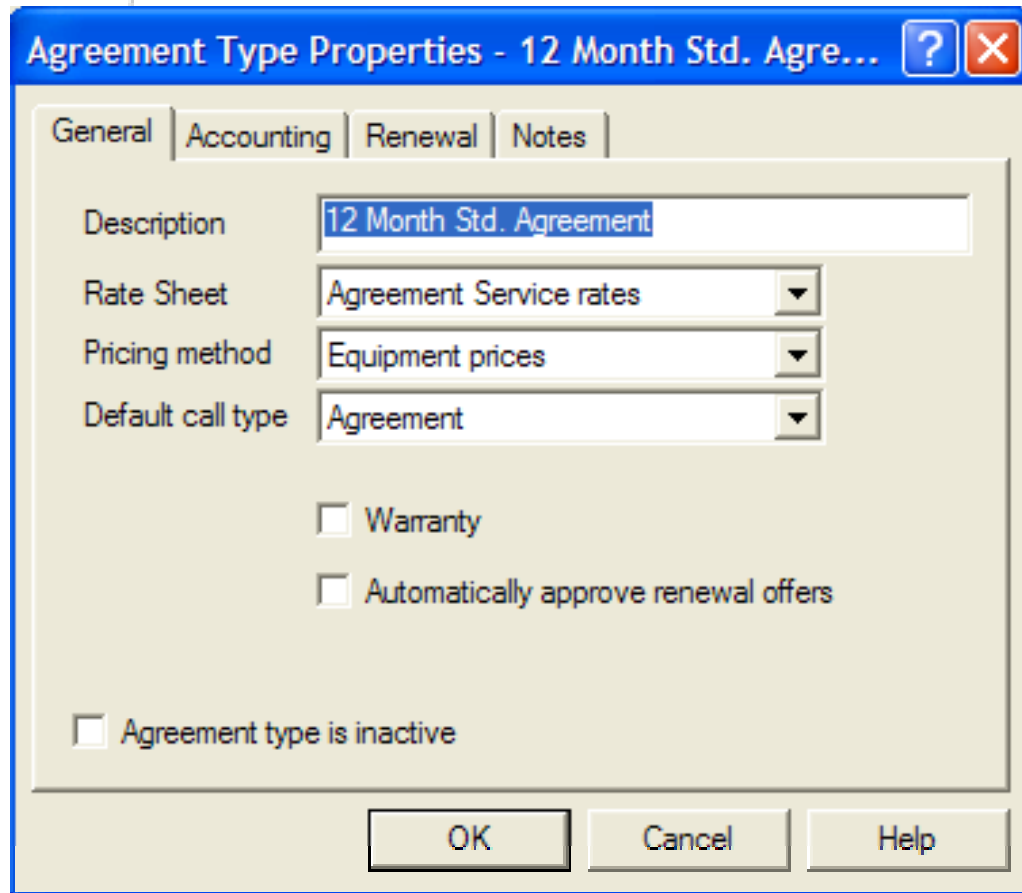
The screenshot displays a scheduling interface with a grid of technicians and their availability. The technicians listed are: 130 Graham, Joseph S (2-5.00 Available), 113 Hardy, Bruce J (3-6.00 Available), 129 Hernandez, Carlos (3-7.50 Available), 101 Robert E Jones (3-7.50 Available), and 120 Harry D Smith (2-5.50 Available). The grid shows various job assignments, including: Burns Restaurant (#23174, 2.00 hrs, PDX 97123), Napoli's Pizzeria (#23179, 2.00 hrs, PDX 97652), Bill Rickey (#23167, 0.00 hrs, PDX 97217), Alistate University (#23155, 3.00 hrs, PDX 97623), Memorial Civic Center (#23178, 2.50 hrs, PDX B4.U2.97512), and Alistate University (#23169, 2.50 hrs, PDX 97623). A red arrow points from a callout box to a job detail for Fullerton L (#23177, 2.00 hrs, PDX 97652) at Burns Restaurant. The callout box contains the text: "DROP & DRAG FROM UNASSIGNED TO AVAILABLE TECH".

Technician	Availability	Job	Duration	Location
130 Graham, Joseph S	2-5.00 Available			
113 Hardy, Bruce J	3-6.00 Available			
129 Hernandez, Carlos	3-7.50 Available			
101 Robert E Jones	3-7.50 Available	Burns Restaurant	2.00 hrs	PDX 97123
120 Harry D Smith	2-5.50 Available			
Unassigned	1-4.00 None	Fullerton L	2.00 hrs	3458 Agency Rct Portland, OR
8787 PARTS ON OF	3-8.00 Available	Fullerton L		3458 Agency Rct Portland, OR
		Debi Bron:		58923 E 14th St Canby, OR
		Clackama:		27540 SE 82nd Portland, OR

DROP & DRAG FROM UNASSIGNED TO AVAILABLE TECH

#23177, Priority: Urgent
Service, No Power
Comments: No power is available.
Permission:
PDX
3458 Agency Road, Portland, OR, 97652
Main Phone: (503)355-3434
Jerry: (503)355-3434
8:00 am-12:00 pm (4.00 hrs)
Open
Promised at: 8:00 am

View all the jobs details at the bottom of the schedule board simply by clicking on that scheduled activity..



The screenshot shows a software dialog box titled "Agreement Type Properties - 12 Month Std. Agre...". It has four tabs: "General", "Accounting", "Renewal", and "Notes", with "General" selected. The "Description" field contains "12 Month Std. Agreement". Below it are three dropdown menus: "Rate Sheet" set to "Agreement Service rates", "Pricing method" set to "Equipment prices", and "Default call type" set to "Agreement". There are three checkboxes: "Warranty" (unchecked), "Automatically approve renewal offers" (unchecked), and "Agreement type is inactive" (unchecked). At the bottom are "OK", "Cancel", and "Help" buttons.

Configurable contract templates provide easy to use tool to manage your customer, site, equipment and pricing contracts.

Easily track costs, histories and service revenue to specific equipment, sites, covered by contracts.

Price and bill jobs automatically based on contract information

Easily plan your Maintenance Workload

The screenshot displays the 'Service Management - Timberline Construction' software interface. The main window shows a calendar grid for the year 2007, with columns for days of the week (S, M, T, W, T, F, S) and rows for months (January to December). Each cell in the grid contains a number representing the total workload hours for that day. The workload is color-coded: green for 4 hours, yellow for 6 hours, and red for 8 hours. A red dotted line highlights the month of August. Below the calendar, a table titled 'First Friday of September' provides details for specific maintenance obligations.

Description	Equipment	Locations	Frequency	Est. Hours	Skill	Technician	Agreement #
A/C clean and Charge	Air Conditioners	Travel Academy	Monthly	5.00	AC Installation	7676 Unassigned	
A/C clean and Charge	Furnace	Travel Academy	Monthly	1.00			
A/C clean and Charge	Air Conditioners	ALLState University	Monthly	4.00			

Arrows point from the text below to the calendar grid and the table above.

Click on any existing obligation for further details.

Easy overview of exiting total workload based on hours per day per month.

Forecast your periodical maintenance obligations & plan your workload (workforce) and maximise the productivity of your workforce.

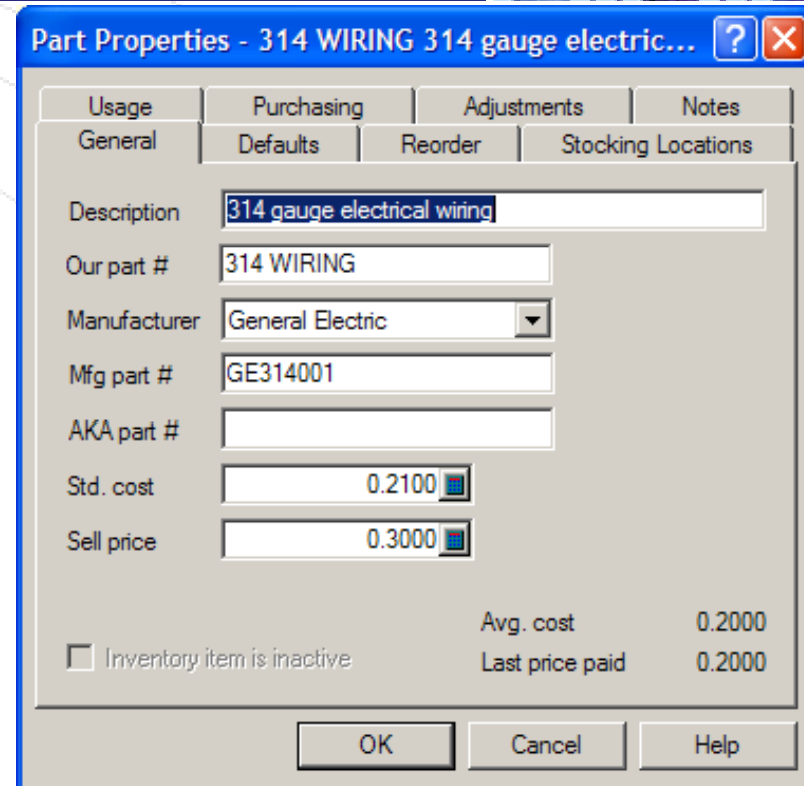


- ✓ **Preventive maintenance scheduled for next 12 months by technician on an easy-to-read preventive maintenance board.**
 - ✓ **Maximize profitability by amortizing service agreements.**
 - ✓ **Forecast parts required before sending technician to site**
 - ✓ **Create multiple tasks by customer or equipment.**
 - ✓ **Use agreement and equipment profitability reports to better monitor your operations and maximise contract profitability.**
 - ✓ **Create parts lists needed for maintenance jobs by scrolling through parts lists and clicking on the appropriate item.**
- Use agreement and equipment profitability reports to better monitor your operations, plan workloads and generate cashflow.**

Track minimum and maximum inventory level.

- Perform accurate physical counts.
- Look up AKA part numbers
- Easily track serialized parts.
- Automatically generate customer equipment from invoicing.
- Track vehicle inventory and create stocking lists for each vehicle.

Generate detailed inventory transactions (e.g. produce a re-stocking list of parts used per truck) and ensure you have the right part, at the right cost to complete the job



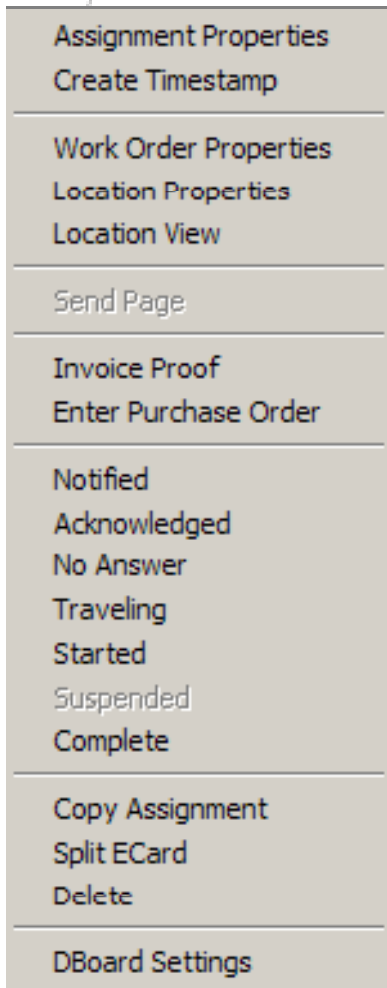
The screenshot shows a software window titled "Part Properties - 314 WIRING 314 gauge electric...". The window has a blue title bar and a standard Windows-style interface. It contains several tabs: "Usage", "Purchasing", "Adjustments", and "Notes". The "Purchasing" tab is active, showing sub-tabs for "Defaults", "Reorder", and "Stocking Locations". The "Defaults" sub-tab is selected, displaying the following fields:

Description	314 gauge electrical wiring
Our part #	314 WIRING
Manufacturer	General Electric
Mfg part #	GE314001
AKA part #	
Std. cost	0.2100
Sell price	0.3000
Avg. cost	0.2000
Last price paid	0.2000

At the bottom of the window, there is a checkbox labeled "Inventory item is inactive" which is currently unchecked. Below the checkbox are three buttons: "OK", "Cancel", and "Help".

Purchase order control:

- Never bill a job again with outstanding materials or services
- Quickly provide technicians with purchase order numbers linked directly to jobs.
- Automatically update inventory part costs and sell prices.
- Attach purchase orders to fixed price jobs in order to track costs.
- Easily credit purchase orders for core returns and RMAs.
- Right click from most windows to enter purchase orders.



Right Click

Streamline your inventory and purchasing processes.



➤ **Integrate Service into your total operations**

Have a single system company wide for accounting, construction, jobbing, payroll & service.

➤ **Streamline your administrative processes**

Enter information once and route information throughout organisation.

➤ Manage your inventory and jobs, **reduce lead time to invoice and increase invoice amounts**

➤ **Increase the productivity of your technicians** schedule more jobs & complete them faster.



Contact

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Lets work together to discuss your field service requirements further.