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 error. 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.
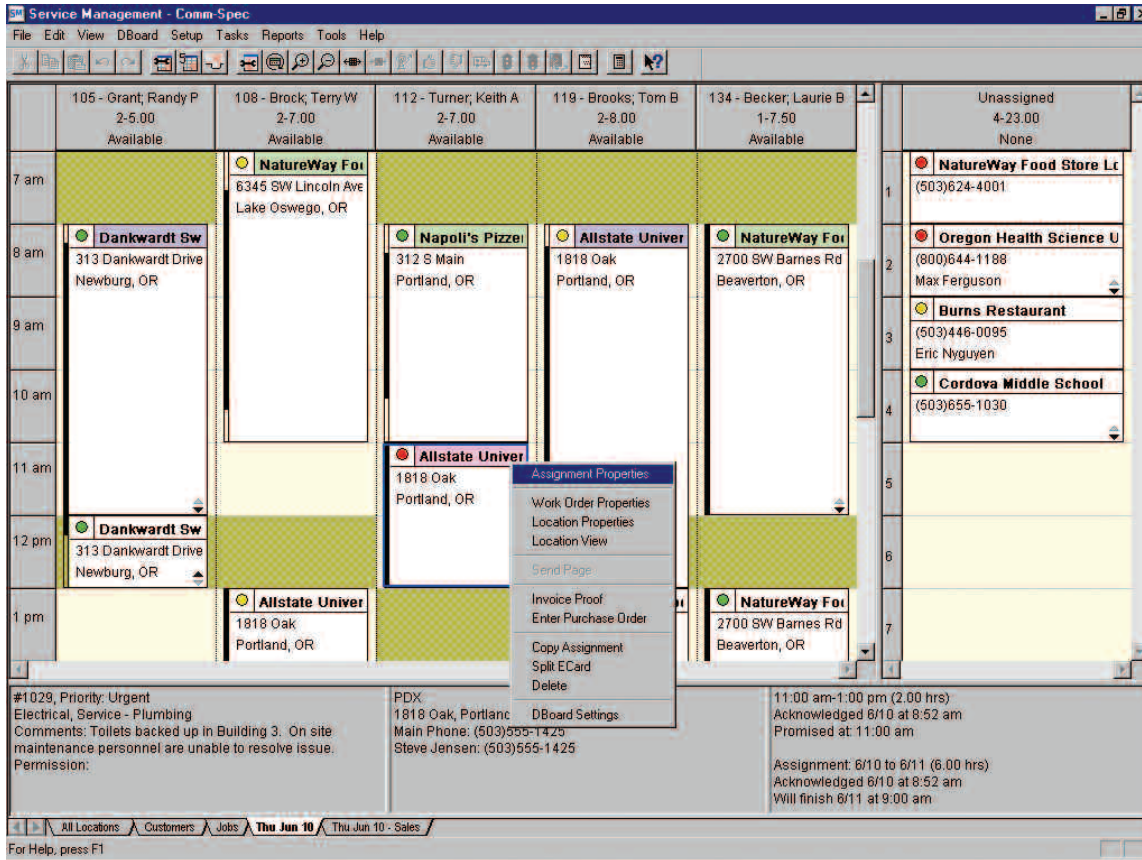
Dispatching features and efficiencies

- 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 materials 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 a 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 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.

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.

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