

## Service Management



Streamlining your control over service operations, Sage 300 Construction and Real Estate (formerly Sage Timberline Office) 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.

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.

### 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, 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.

### Benefits

- **Easily lower** response times for service dispatching.
- **Eliminate duplicate data entry** and reduce the risk of potential errors.

# Sage 300 Construction and Real Estate

---

- 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.

For more information, contact your Sage business partner or customer account manager at 800-858-7095.

## About The Sage Group, plc

We provide small and medium-sized organizations with a range of easy-to-use, secure, and efficient business management software and services-from accounting and payroll to enterprise resource planning, customer relationship management, and payments. Our customers receive continuous advice and support through our global network of local experts to help them solve their business problems, giving them the confidence to achieve their business ambitions. Formed in 1981, Sage was floated on the London Stock Exchange in 1989 and entered the FTSE 100 in 1999. Sage has millions of customers and more than 12,700 employees in 24 countries covering the UK & Ireland, mainland Europe, North America, South Africa, Australia, Asia, and Brazil.

For more information about Sage in North America, please visit the company website at [Sage.com](http://Sage.com). Follow Sage North America on Facebook, [Facebook.com/Sage](https://www.facebook.com/Sage), and Twitter, [Twitter.com/SageNAmerica](https://twitter.com/SageNAmerica).

---

For more info, visit: [SageCRE.com](http://SageCRE.com)  
or contact us at 800-858-7095