

Services Management Sage 100cloud ERP



The Services Management Ecoboost integrates seamlessly with Sage 100 products and can handle all your service needs including entry of service calls, management of field technician schedules, invoicing for material, and labor to costing of contracts.

KEY FEATURE

Manage technician activity using a drag and drop Dispatch Board

KEY FEATURE

Track profitability of contracts by analyzing billings and costs incurred for both material and services provided during the term of the contract

KEY FEATURE

Auto generation of service calls based on preventive maintenance contracts or processed installation sales orders

KEY FEATURE

Integration with Business Insight Explorer to display information by task type, contract, technician

Technician Scheduling

- Create multiple dispatch board views by defining the info displayed for each service call as well as the selection criteria for displayed service calls
- Add new services calls using the dispatch board
- Auto create tasks based on preventive maintenance contracts defined
- Auto create installation service calls based on options selected during order entry and the routing options defined for the item
- Match technician skills to requirements defined for each nature of task
- Track technician availability and prompt for customer scheduling conflicts
- Communicate dispatch information to technicians via email or fax
- Display history of service calls for a specific item/serial number or for a specific location
- Auto generate installation tasks based on Routings defined from the Sales Order
- Optional integration with MapPoint

Billing

- Streamline billing by allowing for loading of labor and material for service calls into Sage 100cloud Sales Order or an Invoice Transaction
- Enter labor/material in the field with mobile device

Contract Management

- Auto generate renewal invoices for annual contracts
- Track deferred revenue for annualized contracts
- Generate warranty contracts for each item
- Set rates for labor/material based on defined contracts
- Auto generate contracts from Sales Order using template contracts linked to inventory items

Inventory Control

- Track inventory at customer site and maintain technician truck inventory
- Create purchase orders for material needed for service calls; visual display notifies dispatcher as product is received for the generated purchase order

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