

## Contract Manager Module for Sage MAS 90 and MAS 200

---

### Product Information

---

Conative Systems, Inc. (CSI) has spent almost two decades developing and implementing service industry software systems. Our software modules have been well received within the sales and service industry and we are confident that the value received from our products will significantly enhance your operations.

This White Paper brings out the benefits of Contract Manager and related Sage MAS 90 and 200© Accounting elements for managing your business from the service department to accounting.



# White Paper

Conative Systems, Inc, has been in business since 1990. Our focus has been the service and repair industries. Over two decades we have developed and implemented industry specific business management systems integrated to the robust Sage MAS 90 and 200 Accounting system.

The Service Manager products are easy to install, easy to train, and simple to operate for first-time Users. As a result of streamlined functionality and value-added features we are well received by both End Users and Management. The unique features we offer can enhance your competitive edge and reduce cost. We believe that the inclusion of Service Manager in your operations will further your company's long-term strategy.

Our years of experience in implementing business systems places us in a unique position to offer qualified consulting and implementation services to ensure a successful business system.

Keeping up with trends and delivering vital products is a job we take seriously. Upgrades are typically delivered quarterly and consists mostly of new features such as new reports, added User requested functions, and database updates for pricing, flat rates, etc.

Our relationship starts with the installation and continues well after post-implementation. Useful upgrades and information is offered throughout the year. Customer feedback and our own research is compiled into valuable upgrades and newsletters and automatically sent to our clients.

## **Contact Us**

For more information about Service Manager System. Please call us at (951) 694-5333 or send us an email to: [info@conativesystem.com](mailto:info@conativesystem.com)

## **Conative Systems, Inc.**

Service Manager Business Solutions

# White Paper

## Contract Manager - Overview

Contract Manager delivers a complete lifecycle system starting with the initial negotiation then agreement writing, activation of contract, day-to-day management, billing and finally compliance and performance reporting.

We have designed a system with flexible features for defining agreements that fit into your unique business environment. Contract Manager has User-definable scope-of-services, business rules and alerts, billing rules, and pricing options. This provides for an adaptable contract capable of fitting numerous business requirements.

Contract Manager's rule enforcement and reporting helps you provide the proper service at the right time, perform accurate billing, and capture exceptions for future analysis. Service Levels let you predefine classes of service that can be quickly assigned to a contract's details. For example: you can define a service level of "24/7 weekends included, labor included, parts billable, mileage at \$0.50/mile"

Budgets can be defined under the contract and broken down by phases and sub-phases. Each phase will automatically track the materials and services you specify. This enables comparison of budget to actual. Use reporting or service alerts to inform managers over budget status.

Estimates can be defined under the contract, broken down by phases and sub-phases. Each phase will track the material and services you specify. Use reporting or service alerts to inform sales managers that estimates are exceeded.

The contract will track all transactions posted to it from sales to service to add/changes/deletes. This stream of important data is used in many types of profit and cost reports, real-time inquiries and service alerts.

Contract Manager fully integrates with the Work Order module. When a Work Order is processed, and it is under a contract, the contract's scope-of-services apply. In addition all cost and other activity is rolled up to the contract for determining cost of maintaining the contract and profitability.

# White Paper

## Contract Manager - Benefits

- \* Live up to customer's service level by being better informed of contractual parameters.
- \* Better capture billable service by use of contract scope-of-service enforcement.
- \* Automatically handle scheduled service.
- \* Automatic and accurate billings on a periodic basis eliminating discrepancies in billing rates.
- \* Field service becomes informed if contractual specifications including special instructions, directions to customer location, customer service level, contract status, and coverage.
- \* Analysis of contract profitability gives management insight and leverage on future decisions.
- \* You can define exactly what is covered under contract and the system will report this information during the service cycle. Coverage can be broken down by types of service, labor and materials.
- \* Instantly know you contract profitability and current cost-to-billing ratio.
- \* Eliminate billing errors of rates, addresses, and coverage details.
- \* No more missed scheduled services and other commitments.
- \* View all service work performed against a contract and its service items (equipment).
- \* Service staff instantly knows if equipment or a customer location is covered under contract and to what extent.
- \* Instantly view the current billed and unbilled dollars.
- \* Streamline contract management by reducing contract management time.

# White Paper

## Contract Manager Features

### Standard Version

- \* Multiple locations covered under one contract.
- \* Strong Equipment Management and Tracking.
- \* Flexible billing and rate options for automated and accurate invoicing status.
- \* Set Contract properties such as Renewal Adjustments, Price Matrix, default worker, commissions and more.
- \* Materials, kits and tools needed to do a job can be predefined.
- \* Enter memos to describe details of services and legal text. Prints on contract and invoice forms.
- \* Specify equipment covered under contract.
- \* Generates renewal proposals.
- \* Metering and other usage tracking and billing are handled.
- \* Attach any Windows support document to the contact for viewing and printing on forms.
- \* User defined contract types for defining the nature of the contract such as Standard, Rental, Metered Subscription, etc.
- \* User defined contract terms such as Yearly, Quarterly, Monthly, Deferred, etc.
- \* Billing methods include: Periodic, Flat Rate, Block for Hours/Dollars, Service Levels and more.
- \* Import large lists of customer equipment quickly.
- \* Instantly view invoice detail and payments made.
- \* Integrates with our eService Web module for taking contract requests and other functions over the internet.
- \* Assign staff responsibilities including primary field tech, managers, sales department, etc.

### Cost, Estimate, Budget Tracking

- \* Define cost tracking categories for cost-of-service analysis.
- \* Compare actual cost to estimates, budgets, and coverage parameters.
- \* Define phases to structure and manage the contract at a very detailed level.

### Contract Coverage

- \* User-defined scope-of-service to define what is covered under contract.
- \* Define if parts or labor are included and to what extent.
- \* Define if travel charges apply and allowed distances.

### Scheduled Maintenance

- \* Define, Manage, and Bill Scheduled Tasks (preventative maintenance). Frequency by days, weeks, months.
- \* Pre-Scheduled services years in advance.
- \* Completely automated from definition of scheduled service through the service cycle and billing.

### Reporting and Management

- \* Automated Business Alert can be set to notify manager when service is not complying with a contract's parameters.
- \* Automated Business alerts expiring contract, milestones, action items, and payments.
- \* Resource Management. Tools available to ensure you have the proper labor and materials available to meet contract scope-of-service.
- \* Reports Include: Profitability, Expiring Contract, Expiring Warranty, Contract Status, Contract Detail and more.