

## Service Manager Sales and Service Business System with Add-On's

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### White Paper

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Conative Systems, Inc. (CSI) has spent over 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 Service Manager Sales and Service Business System 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

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## **Training**

CSI provides training on our products and Sage MAS 90 and 200 accounting. We have the staff to support accounting and consulting needs. Training is commonly performed using go-meeting a process we have found successful and economical. On site training is also offered.

## **Programming and Related Services**

Enhancement services for Service Manager and Sage MAS 90 and 200 is available. With ever changing business requirements and the need to stay competitive puts demands on a business system to adapt. ASI has always considered this fact and has built a system capable of change.

We are specialists in problem solving, system design, Sage MAS 90 and 200 development and Crystal Reports.

## **Support**

Software maintenance support is offered at no cost, and Standard Support is offered under block time Support Agreements with a selection of scope-of-services from standard to premium response times.

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## List of Benefits

Managing your business and staying profitable is more important than ever before. Over years we have spent much time on site, observing our client's operations and taking notes. Hot areas of business that we have seen; Tracking of labor, managing technicians, managing inventory, stock status inquiries, knowing the status of jobs, producing timely reports to management and the customer, and accounting. We have observed that losing touch over these functions means losing control, and money.

Business Need	How Service Manager Helps
<b>Managing Jobs and Counter Sales</b>	Repair Order and Counter Order processing offer high level services to the User and Manager for defining, managing, and billing jobs and part sales.
<b>Parts Management</b>	Real time inventory control. Manages inventory from purchasing, to warehousing, to sales and reordering. Customer and part records provide automatic pricing, flat rates, general ledger defaults, and other parameters designed to automate processes
<b>Job Management</b>	Offers powerful automated subsystem for defining, tracking, and auditing. Puts job control into your hands. Lets you set business rules and alerts to help automate shop and field management.
<b>Consistent Billings to the Customer</b>	Fast customer invoicing is facilitated by system parameters and billing rules. Reduces customer credits and rebills by providing accurate invoices. As a result you can improve cash flow and better utilize your staff resources.
<b>Warranty Handling</b>	Warranty work is processed under the RO, and optionally billed to the vendor. Warranty claims easily managed, uploaded, and reported.
<b>Management Level Reporting</b>	Service, Accounts Receivable, Inventory, and Accounting have available numerous reports offering better management information to help you stay in control of your business.
<b>Shop and Field Time Tracking</b>	Shop Time Entry reduces non-billable hours and records unproductive time. Instantly print Worker's committed and uncommitted time reports. Logs and tracks field Worker time. Comprehensive productivity reports.
<b>Critical Information Needed During Business Operations</b>	Make customers happy with your response and depth of knowledge. Quickly profile the customer and equipment, showing services and sales history, equipment specifications, accounting data, and more.
<b>Data Processing Speed and Accuracy</b>	Several features exist in Work Order and Counter Order to save time in data entry and improve accuracy by defaulting as much data as possible.
<b>Increase productivity and reduce cost</b>	DBS4 can be very useful in increasing profits. Better care for your business in the areas of customer service, sales, inventory, and accounting. Our success stories say it all.

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## OVERVIEW

Service Manager is an enterprise business management system that includes the world class accounting of Sage MAS 90 and 200. The product is broken into Modules and Options. Modules are major components of the business system and Options are add-ons to the Modules.

## Core Modules

### Repair Order

Repair Order Processing - the heart of a service department. Manage and bill all your repair and build services from a single place. Integrated to inventory, purchasing, shop time, and accounting.

### Counter Order

Over the counter sales of parts are handled quickly with needed information available at a click of a mouse.

### Shop Time Management

Report shop and field time. This efficient data processing option facilitates fast entry of hours worked against Work Orders. Time is stored in a register providing for edits/adds/deletes prior to posting Work Orders. Worker time reports are available such as: Efficiency Reporting, Payroll register, Detail labor report by Tech, and more.

### Inventory Management

Service Manager provides a comprehensive inventory management system fitted exactly for what the dealership and equipment services company requires.

### Accounting System

Service Manager uses the world leading MAS accounting software for all accounting functions. Service Manager is written in the same programming language and uses the same database - we are as integrated to Sage MAS 90 and 200 modules as to each other.

## Additional Modules You May Add to the Core Service Manager Product.

### eService Web Module

Enhance your services with a web presence. We can help you set up a customize web option or link to supplement your existing web site.

### Build Manager Module

Light manufacturing / Job shop option. Quickly process build to order, build to stock, refurbish, and repairs all within a single Work Order. MRP report and options available.

### Rental Order Module

Tracks and bills rental equipment. Checks in and checks out equipment. System can automatically schedule maintenance/inspections. Flexible billing methods.

### Field Service Manager Module

Comprehensive field dispatch and labor force management module.

### Suggested Order Module.

Based on specifications from several Dealerships, this module will set Max and Reorder points for selected parts. User-defined logic and select criteria.

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## REPAIR ORDER MANAGEMENT

Repair Order is the heart of the system. This module has been designed to respect the requirements of many large dealerships. General category of services Service Manager can handle are: Repairs, field service, preventative maintenance service, refurbish, and light manufacturing.

### *Features*

- Work Order is broken down into Segments (or sub-jobs) representing specific tasks performed under the Work Order. Each Segment has it's own Parts, Labor, Warranty data, Bill To, Ship To, job notes, estimation, and other data.
- Work Orders can have multiple Bill To such as in the case of warranty work.
- Core inventory tracking. Rebuild cores or receive credit from vendor.
- Fast search of Parts and Labor by description, product line, mfr category and more. User may define search view and criteria.
- Flat Rates (hours). Automatically applies bill hours based on Unit Model and other criteria.
- Make the Work Order and Counter Order process more efficient, reliable, and accurate - using Customer and User defaults. Reduces decisions the User needs to make and increases accuracy.
- Work Order may remain open for days or weeks until billing is complete and expenses are recorded.
- Work Order can receive parts, labor, non-inventory parts, sublet, and surcharges.
- Parts availability by warehouse, parts pricing, and other part information displayed on-demand. System automatically commits inventory when parts added to WO/CO.
- Back Orders automatically generated for out of stock parts.
- Work Order templates may be defined and used in the future to quickly create new Work Orders.
- History is stored indefinitely. Reprint from history at any time. View historical WOs and COs instantly.
- Quick start the Work Order or Counter Order off basic data such as; Customer name, customer phone, equipment serial, equipment ID, etc.
- Instant printing of invoice pre-invoice, Work Order, and hard card.
- Manufacturer warranty uploads for claims processing.
- Equipment history with drill-down. View all service and transactional history of a Unit.
- Add cost to Equipment during rebuild, and unit installations. Record parts and labor. Post to your profit and loss.
- Sales Analysis by customer, salesperson, location, repair type, and product line.
- Customizable parts record update. Updates range of part records based on your import data.
- POS (Point of service) defines service location and accounting parameters.
- G/L posting by Department, Warehouse/Location, Division, and Service Type.
- Credit checking. System will automatically display credit information if over limit or on hold. Password to continue.
- Invoicing Repair Orders and Counter Orders is a simple few clicks. Configure billing parameters such as labor rates, parts pricing, surcharges, billing methods, and invoice printing formats.
- Unlimited memo for entering invoice and job notes.
- Job time-lines can be tracked on screen or with reporting. Track response time and commitments.
- Parts and labor price matrix automatically set prices based on customer and part criteria. Eight levels of standard pricing per Part. Plus unlimited flex pricing and price matrix for price exceptions. Spend less time looking up prices.

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## RENTAL MANAGEMENT

Single Asset or Fleet rental. Rental agreements define the customer, equipment location, and billing parameters. Rentals are fully integrated with service and accounting.

### *Features*

- Start as Rental Quote, when approved will turn into live Rental Agreement.
- Tracks declined quotes, use data for reporting.
- User definable rate matrix for pricing and frequency. Charge by day, week, month, etc.
- Tracks rental Assets. Check In and Check Out options make the process fast and accurate.
- Access customer's part rental history including declined quotes.
- Dispatch field techs using DBS4's Field Service Module. You can maximize driver's time by coordinating delivery of Assets to the customer's location. Log travel time and delivery expenses.
- Returned Assets can automatically prompt for service before returned to the available rental Asset inventory.
- At any time you can view Asset status and location. Asset reservations possible.

## EQUIPMENT MANAGEMENT

Various degrees of equipment management and tracking is available with Service Manager. You may choose to define simple equipment records, tracking basic data such as date sold, last service date, and service history. Or define equipment for life cycle management where every detail is tracked from acquisition to sale to service to trade in. Rebuild the unit and start a new life cycle.

Equipment management encompasses the following: Cost tracking, service history, scheduled maintenances (preventative maintenance), cost accounting, tools and materials requirements for service, safety instructions, components to infinite levels, warranty tracking, meter/mileage tracking, asset type/cost center, and more.

### *Features*

- Life cycle management.
- Vehicle/Equipment management. Service Manager provides a Bill Of Material approach to tracking equipment and it's components. Top level is the truck or unit. Below this level you may define engine, refrigeration unit, chassis, body, options, accessories, etc. This concept offers superior tracking of equipment and is best compatible with rebuilding and building processes.
- Cost tracking. Equipment record tracks all transactions performed during it's service history.
- Automated Equipment status tracking for stock status, shop status, and condition.
- Instant transfer of equipment between customers and locations.
- Maintenance and inspection logging to the equipment record.
- Warranty and extended warranty management.
- Hours/Miles/Kilometer metering.
- Instantly locate Equipment by Model, Serial, Unit ID, Customer, Equipment description.
- Types of data you can track per equipment record includes: Model, serial, unit ID, location, make, manufacturer, status, product line, MSRP, cost, rent price, year in service, DOD, warranty, and much more.
- System can perform automatic production of Work Orders for preventative maintenance.

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## SHOP TIME MANAGEMENT

Shop Time entry facilitates the logging of tasks performed on the shop floor and manages these transactions to the Repair Order or Work Order. Time can be viewed, printed, edited and finally posted to the Repair Order and Work Order. Audit file tracks all entries and adjustments useful in important labor reports.

### *Features*

- Capture tech and clerical time at a time terminal.
- Logs time to Repair Order directly.
- Start/end shift and on/off breaks for tracking actual time worked.
- Select SRT Codes (service request task) from quick-selection menu.
- Redistribution of time. Transfer time to other jobs or between billed and non-billed time.
- Daily Transaction Edit. Designed to let you audit and edit time entries prior to committing them to Repair Orders.
- Instant print of Tech's committed and uncommitted time.
- Worker efficiency. System retains hours worked, hours billed, and flat rate hours. Many reports are available to present this data in a format useful to management.

## eSERVICE WEB and COMMUNICATIONS MODULE

Extends your product and service offerings. Customers and Techs can acquire critical information whenever they need it.

### *Features*

- eService module may supplement your existing web site or programmed to be your main web site.
- Service requests can be placed by the customer over the Internet. Service can be flagged as priority for faster service response.
- Customer may inquire on open jobs, view job status, and add comments to jobs. Customer may also perform service history inquiries.
- Customer may view their equipment and equipment for sale or rent.
- Customer may view parts availability and place purchase requests.
- Tech may inquire on assigned jobs and tech parts, labor, and memos to open jobs.
- Data Uploads. Service Manager has options available that can compile data for the purpose of data transfer to a customer, vendor, or manufacturer.

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## INVENTORY MANAGEMENT

Parts management for the dealership is paramount. Service Manager provides complete management of parts in all three main areas: Purchasing, Warehousing, and Sales.

### *Features*

- Strong inventory management and accounting.
- Part types include: Serial, Lot, LIFO, FIFO, Standard Cost, Average Cost.
- Inventory and Purchasing. Parts management in the areas of purchasing, parts sales, unit sales, manufacturing, suggested order.
- Customer back orders fully tracked within the WO.
- Suggested Order. The right parts at the right time and best quantity to order.
- Un-sold parts can be easily identified for returning to vendor. Feeds suggested order report.
- Dirty Core tracking capture dollars from the vendor normally lost. Clean Cores set dollar value to make the process automated.
- Back Order reporting. Shows quantity on back order, on purchase order and lists WO/CO's the part is currently on.
- Inventory Ranking report. Prints and updates an inventory category with a grade that indicates last sold status.

## BUILD MANAGER

Build Manager is a light job shop module and compliments the Service Manager business system for those who build, rebuild, or assemble units. Build to stock or directly to sales. Complete accounting for materials, labor, and parts.

### *Features*

- Build to stock or build to customer order.
- Employ a Bill of Materials to define build Units. Instantly view BOM's stock availability from a single on-screen view.
- Cost transaction roll up to the build Unit. View all Unit transactions through drill-down or reporting.
- Make and sell Unit on the same Work Order. Invoicing Units are fast and on-demand.
- Parts are instantly issued from inventory during build process.
- Collect miscellaneous costs even after Unit is build and invoiced.

## COUNTER ORDER

The Counter Order option is used for over-the-counter parts sales and to register parts used on open WO. The design of Counter Order Entry is based off direct feedback from several large dealerships. We have made the selling of parts and printing the invoice a quick process with minimal key strokes.

### *Features*

- Quick entry process to facilitate rapid over-the-counter sales.
- Counter Order price matrix applies for parts.
- Instant invoice printing.
- Handles Back Order from within the Counter Order.
- Specialized Invoice printing. Very flexible and easy to edit.
- Launch Repair Orders from within the Counter Order for adding parts to open jobs.

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## CUSTOMER ACCOUNTS

The Customer account holds data not only related to accounting but also the service department.

### *Features*

- RO, CO, and Invoice shows instant view of customer credit and other account information. Setup customer account to automatically inform the User of credit limit data when entering orders. Password protect available.
- RO and CO generate batches of invoices for you to review and print prior to posting to the system.
- Tax Schedules may be define per customer account, ship to, or overridden on the RO/CO.
- Customer may set discount and commissions.
- Multiple ship to sites and POS (Point of Service).
- Price matrix for Repair Order and Counter Order each.
- Surcharges for EPA and environmental calculate based on parts, labor or both.
- Many defaults to help the Repair Order/Counter Order process such as: Department, pricing parameters, Blanket PO, PO Required, PO Parts/Labor above dollar limit, Credit Card info, global labor rate, site specific tax schedule, etc.

## OTHER FEATURES

- Based on our experience our customers were able to increase their sales and service revenue without adding staff, sometimes placing data processing staff into more profitable roles.
- Services performed in your shop or out in the field are representations to your customers and play an important role in your ongoing relationship with your customers.
- Recommended service. During any point of the service process you may enter recommended services for a customer. Automatically be alerted to recommended service at the proper time.
- Turn your equipment data, service history, and sales history into a sales tool.
- Use the web to present offerings and get new business.
- Object-based security. Security by role or User can be applied to any field or button in Service Manager.
- Invoice batch merge and batch preinvoice-to-invoice updates. Saves time in daily processing for invoice posting.
- AutoTask. Schedule automatic tasks for Service Manager functions such as invoice batch merges, invoice updates, file maintenance, warranty upload and more.