

Advanced Edition

Manages every aspect of service operations for improved productivity and efficiency.

Service Management, Incident Tracking & Invoicing



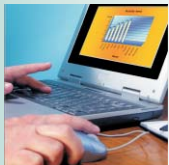
Service Orders, Resource Scheduling, Expense Tracking & Dispatch



Asset Management & Plant Maintenance Functions



Customer History, Warranty Tracking & Business Analytics



Speeds Information Flow

Service Management-Plus (SM-Plus)™ speeds the information flow between business units to accelerate performance and help organizations achieve service excellence.

Improves Efficiencies

The right service management system improves efficiencies by increasing throughput, decreasing transaction costs, and helping to monitor critical numbers. Service personnel can respond quicker, utilize resources more efficiently, schedule and dispatch technicians best suited for the job and proactively schedule preventive plant maintenance.

Acts as Delivery Mechanism

SM-Plus acts as a delivery mechanism for your products and services to build customer loyalty and sustain a competitive edge. SM-Plus will help you deliver quality products and services with a profitable return.

Provides Information, the Source of Power

In order to respond quickly to customer inquiries, service personnel need access to the right information. SM-Plus' transparent information infrastructure provides access to all pertinent information leading to better decision making.

Creates Corporate Value and Stakeholder Wealth

With SM-Plus as a product and service delivery mechanism, you'll see a timely improvement in productivity and efficiencies, creating impressive bottom-line results and return on your investment. Perhaps more importantly, you'll increase customer satisfaction by improving the entire service experience.



Increased employee productivity & improved resource efficiencies create a timely return on your investment.

Key Benefits:

Reduce cost of service & warranty repairs

Respond faster to customer inquiries

Resolve many service issues at the incident level

Better manage resources

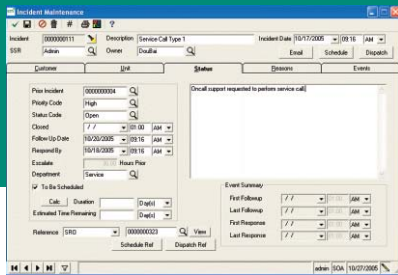
Increase service revenues

Better manage inventories

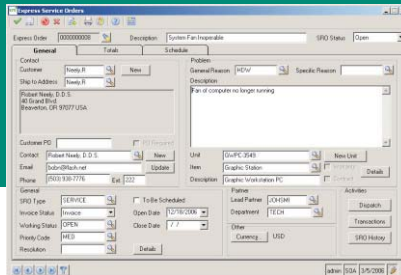
Reduce equipment downtime

Increase productivity & employee morale

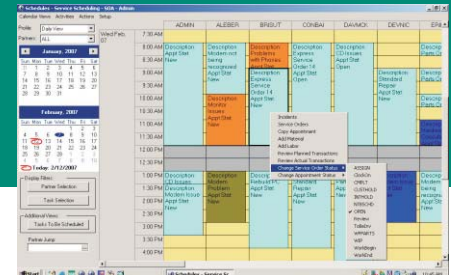
Match skill sets/certifications with service orders



Call Center & Incident Tracking
Manage service issues and solve many at the incident level.



Express Service Order
Enter all customer and service request details from one easy-to-use screen.



Scheduling & Dispatch
Access calendars and technician availability before scheduling service orders.

Total Service Support

SM-Plus Advanced Edition supports all types of service delivery methods, including contact center, field service and depot repair functions. With powerful features—including Incidents, Scheduling & Dispatch, Express Service Orders, SRO Templates and Unit Configurations—organizations can deliver total service to their customers, from technical support over the phone and high-volume, dispatch-centric

QUICK START

Training Included

Get a quick-start. We include a training class on fundamentals of the program.

service calls in the field— to complex, asset-centric operations— like re-builds and core tracking in the service depot.

Service Management

Service Request Orders (SROs) are the primary “documents” used for service task management, cost tracking and billing operations. They can be used to handle functions such as...

Break/Fix Service Calls - for tracking service history performed on any specific product/component.

Warranty Claims - for processing claims submitted by dealers/consumers for reimbursement.

Expense Tracking & Invoicing - for recording all material and labor incurred during a service call and creating/integrating invoices into the standard Sage MAS 500 A/R module.

Multiple Lines & Operations - for performing multiple tasks and servicing multiple products under one SRO.

The flexibility of SROs make it easy to configure and execute service orders in a way that maximizes efficient use of time and material.

Incident Tracking

Besides the essential Service Management SRO capabilities listed above, the Advanced Edition of SM-Plus offers valuable incident-level features:

Event Tracking - for logging all communication in the process, from initial call to resolution.

Customer Profiles - for easy access to customer contact information, purchases, service history and any open incidents.

Information Access - for resolving inquiries, detailed information is available including service history, the contract or warranty status and event tracking.

Knowledge Search - for providing suggested activity steps to resolve common issues, allowing many service issues to be resolved immediately over the phone.

Call Escalation Codes - for ranking calls that may require priority attention.

The incident-level functionality of the Advanced Edition provides personnel with the information needed to efficiently answer customer inquiries and, many times, resolve issues immediately over the phone.

Resource Scheduling & Dispatch

Resource Scheduling helps you match technician skills with job requirements as well as provide total visibility

of available partners and material for better utilization and allocation of resources: **Partner Definitions** - define partners as subcontractors, employees, customers, resource or any combination.

Drag/Drop Scheduling - see the partner and materials available and quickly change times or resources as needed.

Skills & Location Matching - assign partners to incidents or service orders based on certification, skill level or location.

Before a service technician is dispatched, the call center can verify unit description, check warranty status and determine resources which may be required.

Item Schedule - quickly identify and schedule service parts received against pending service orders.

Automatic Service Order Generation - setup and schedule recurring maintenance or service calls automatically.

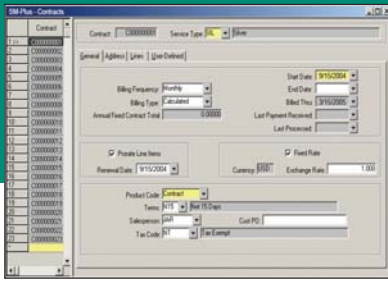
Partner Queue Scheduling - re-sequence and maintain appointments based on priority status.

Preferred Partner Dispatching - auto-assign “Preferred Partner” for specific customer or unit.

Work Order Updates - update work order, labor and materials status directly from the dispatch board.

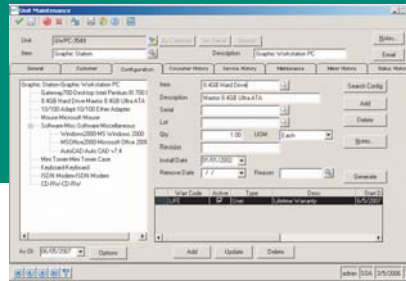
Resource scheduling provides total visibility of partners and materials available, providing better utilization of resources and reducing service and repair requests.





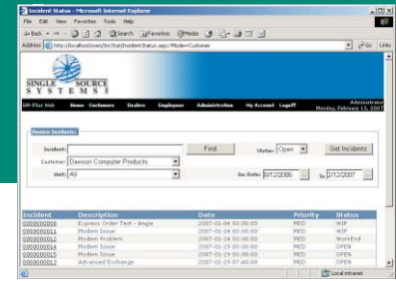
Service Contracts

Easily track and manage customer service contracts with several plans and billing options.



Unit Maintenance

Asset management and plant maintenance are simplified through automatic scheduling.



SM-Plus Web

Access to data from any location extends the system to customers and subcontractors too.

Service Contracts

SM-Plus for Sage MAS 500 provides flexible contract administration allowing you to tailor your contract options to meet a variety of customer needs.

Contract Rates – contract rates can be fixed rate, discounted, calculated, standard rates, or time and material.

Billing Options – contract administrators specify a monthly, bimonthly, quarterly, semi-annual or annual billing plan.

Automatic Renewals – warranty and service contract updates occur automatically, providing sales representatives with up-sell opportunities to increase service revenues.

Discrete Contract Pricing – billing and entitlement information can be stored for use in determining pricing for materials, labor and miscellaneous expenses.

Long-Term Rental - contracts can be configured to provide monthly, quarterly or annual rental agreements.

The Service Contracts module allows you to offer flexible contract and billing options to your customers and provides contract up-selling opportunities.

Expense Reconciliation/Reimbursement

Expense Reconciliation & Reimbursement

Employees can enter time and miscellaneous expenses from SROs via the Unified Time Entry screen, the SM-Plus Mobile module or the SM-Plus Web “My Work Orders” form.

Reduced Administration – proper tracking, reconciling and reimbursement of expenses can happen as they occur.

Convenient Access – an optional web enabled version is also available for time and expense entry.

The module allows you to review all expenses prior to posting them for billing and/or reimbursement to the technician for out-of-pocket expenses, plus manage and reconcile company credit cards used for miscellaneous field purchases.



With historical information readily accessible, tracking warranty status & maintaining service contracts becomes a streamlined process.

Warranty Tracking

SM-Plus for Sage MAS 500 gives users complete visibility into warranty information of a product including all individual sub-components. A complete history of all add-on and replacement parts made over time is tracked and can be viewed from a single screen.

Complete Component History – view product configuration for any date, including as-built, as-sold, and as-is configurations.

Service History – record all changes and repairs made to a product along with the reasons and technician that made the change.

System Warranties – assign warranties to the product or complete system.

Warranty Origination – manage the partner providing warranty service (vendor, manufacturer or dealer).

Consumer Registration History – record each time a new user registers a product.

Unit Status History – track status of a unit, whether it's active, loaned, rented or in production, etc.

A system for managing warranty coverage enables you to monitor warranty commitments, maximize service revenues and increase profitability.

Optional Modules

SM-Plus Mobile™ allows users with handheld devices or laptops to log SRO transactions, check incident status, view unit configurations and capture signatures of customers to verify receipt of services.

SM-Plus Web™ remote users, including employees, customers and sub-contractors, with internet access can enter SRO transactions, and register units for warranty coverage.

Microsoft MapPoint Integration - allows users of Microsoft MapPoint to enter an address and receive recommendations for a route and directions.



SM-Plus Mobile enables technicians to access needed information while in the field, eliminating wasted trips.



Seamless Integration with Sage MAS 500 Business System

SM-Plus seamlessly integrates with Sage MAS 500 speeding data flow between your enterprise and service management application. By integrating with MAS 500, SM-Plus accesses and updates information contained in the customer, products and financial files of Sage MAS 500 ERP, eliminating data redundancy and the possibility for data errors.



Redundancy between systems is eliminated, increasing accuracy and information flow.

Integration Benefits

Seamless, Real-time

Integration - ends maintenance of messy interfaces.

Consistent User Interface and Operational

Navigation - speeds user acceptance and minimizes training required.

Utilizes Your Existing MS-SQL Server -

prevents additional services from being required.

Leverages Built-In Sage Functionality - works with System Alerts, document attachments, and multi-currency features.

Service Management Expertise

Service Management Plus (SM-Plus), the flagship value-added extension, has been available to the manufacturing, distribution, and service markets since 1996. SM-Plus seamlessly integrates with Sage MAS 500 ERP, managing every aspect of a company's service operations. Core functionality of SM-Plus also meets internal Enterprise Asset Management (EAM) requirements for fleet and facility maintenance.



An integrated system enables information to flow through every aspect of service operations, from inventory to invoice, no matter how complex the product or customer requirements.

The right service management system will help your service personnel respond quicker, make better decisions, utilize resources more effectively, and build knowledge to speed future decision-making. SM-Plus acts as a delivery mechanism for your products and services to help improve efficiencies and ultimately increase corporate value and shareholder wealth. SM-Plus can be successfully implemented in many manufacturing, distribution and service markets.

Industries Well-Suited for SM-Plus for Sage MAS 500 ERP

Capital Equipment (Manufacturing, Distribution and EAM)

Construction Equipment
Heating, Refrigeration, Ventilation
Manufacturing Machinery
Printing Machinery
Specialty Vehicle (Ambulance, Fire Truck, Motorhome, Yacht)

Elevators, Generators
Industrial Compressors, Pumps
Motorized Devices & Engines
Textile Machinery

Technical Equipment (Manufacturing, Distribution and EAM)

Computer Equipment
Fire & Security Equipment
Network Peripheral Equipment

Electronics
Medical, Dental, Laboratory Devices
Tele-Communications Equipment

Dealers

Construction Equipment
HVAC
Mechanical Contractors
RV & Camper

Fire & Security
Marine & Boats
Office Equipment
Tractors, Trailers, Trucks

Professional Services

Accounting & Auditing
Computer Systems Integration
Government Municipalities
Technical Equipment Maintenance & Repair

Aerospace Maintenance & Repair
Engineering & Design
Software Development
Transportation Maintenance & Repair

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