

# Sage Timberline Office

## Service Agreements/Preventive Maintenance

As an add-on to our Service Management software, Service Agreements/Preventive Maintenance keeps you firmly in control of your preventive maintenance business by tracking service agreement dates and maintenance schedules.

It also prompts you with agreement renewal dates and gives you the ability to determine the profitability of your service call operations.

### BENEFITS

- Easily stay in tune with all aspects of your agreements
- Quick access to all technicians and appointments set

The screenshot displays the 'Service Management - Timberline Construction' software interface. The top menu bar includes File, Edit, View, DBoard, Setup, Tasks, Reports, Tools, and Help. Below the menu is a toolbar with various icons. The main window is divided into several sections:

- Customer (HORNER):** Horner Laboratories, 4523 Nimbus Parkway, Portland, OR 97229. Area: PDX.
- AR Customer (HORN):** Horner Laboratories, 4523 Nimbus Parkway, Portland, OR 97229. Current Amount: 0.00.
- Agreement Summary:** Mary Abrahms (503)555-1111, Main phone: (503)555-1111, Main fax: [blank].
- Agreement Table:**

Agreement #	Status	Coverage Period	Technician	Type	Total	Invoiced	Invoiced Amt	Renewal
6	Active	4/15/2001 to 4/14/2002	137 Black: Donald M	12 Month Std. Agreement	1050.00	1 of 3	350.00	

A context menu is open over the first row of the table, showing options: Properties, Preview, Preview List, Renewal (with a right-pointing arrow), Activate Quote, Cancel, Create Invoice, Agreement Profitability Report, and Equipment Profitability Report.

At the bottom of the window, there is a breadcrumb trail: All Locations > Customers > Jobs > HORNER. The status bar at the very bottom reads 'For Help, press F1' and 'NUM'.

◀ From a customer's service agreement you have instant access to profitability reports as well as information associated with the agreement.

### Service agreement and maintenance tracking

- Track service agreement start, end, and expiration dates.
- Display preventive maintenance scheduled for next 12 months by technician on an easy-to-read preventive maintenance board.
- Program the system to prompt you when service agreements are due for renewal.
- Account for additional revenue resulting from service agreement calls.
- Assign sales and costs to individual customer equipment.
- Override labor rates by warranties or service agreements.
- Perform multiple or periodic billings.
- Price service by total agreement, by piece of equipment, or at time of billing.
- Maximize profitability by amortizing service agreements.
- Schedule recurring maintenance by date range.
- Generate report detailing parts needed for each job by scrolling through parts lists and clicking on the appropriate item.
- Create multiple tasks by customer or equipment.
- Use agreement and equipment profitability reports to better monitor your operations.

Service Agreements/Preventive Maintenance is a part of Sage Timberline Office, fully integrated software created to streamline work and connect the people you depend on to build your business.