

Sage Timberline Enterprise

P.M. Agreements

The P.M. Agreements application in Sage Timberline Enterprise keeps you firmly in control of your maintenance business by accurately tracking service agreement dates and maintenance schedules. You can always be sure that you're on top of your busy service responsibilities and revenue.

Agreements define maintenance services to be performed for a customer according to a specified schedule and for a specified price and may include several service sites. Agreements can be expiring or ongoing. Ongoing agreements continue until terminated. Expiring agreements expire after a specified term (such as 12 months) or may be renewed.

All agreements start as a quote to be proposed to the customer. If the customer accepts the quote, you approve the agreement, and then the agreement becomes active in Service Management. From there, you can generate work orders and invoices for the agreement, depending on the approved specifications.

Access summaries of agreement service schedules and past/upcoming work to consolidate service trips. For example, if you are heading out to a site on a repair call, you can easily view a summary of upcoming agreement work for that site (or for a specific equipment item at the site), and decide whether it makes sense to perform the agreement work while you are on site for the repair call.

The following is a detailed list of Service Agreements features that will help satisfy your customers and simplify your workload.

Features and efficiencies

- Easily amend an agreement if necessary. The amended agreement then automatically takes the place of the original.
- Define service by any number of service sites within the agreement.
- Identify specific equipment items to service, tasks to perform, schedule, and trip details within each service site entry.
- Automatically generate work orders for agreement services, or review pending agreement work and create work orders on demand.
- Create one work order per service visit, or consolidate multiple visits into a single work order.

Agreement pricing and billing

- Specify a pricing and billing method for the entire agreement, or for each individual service within the agreement.
- Use an adjustment billing feature for "one-off" charges or credits for an agreement.
- Choose to price and bill using three flexible pricing methods, whichever is most applicable:
 - Time and materials—Time of service:** Agreement services are billed based on actual time and materials, at the time of service. Billing is done through the work orders.
 - Fixed price—Time of service:** Agreement services are billed using a pre-defined fixed price, at the time of service. Billing is done through the work orders.
 - Fixed price—Periodic:** The customer is billed using a pre-defined fixed price, according to a pre-defined billing schedule. Billing is done through the agreement. Periodic billings can be amortized if desired.

BENEFITS

- Easily track service agreement dates and maintenance schedules
- Price and bill using three flexible pricing methods
- Quickly generate work orders and invoices for the agreement, according to the defined service schedule and billing terms



P.M. Agreements is a part of Sage Timberline Enterprise, a tightly integrated business management solution designed to simplify the complex needs of service and specialty contractors.