

Service and Inventory



Take charge of your complex service business with the Service and Inventory add-on* modules for Sage 100 Contractor. Fully integrated with the Sage 100 Contractor accounting and estimating applications, Service and Inventory help you avoid the extra work and mistakes that can occur when maintaining multiple, disparate service management, accounting, estimating, and inventory systems.

Service

Using the Service module, you can easily handle service contracts, service routes, dispatch, on-call work orders, quotes, and point-of-sale or billing of service work materials in ways that work best for you. For example, you can choose to generate billing during or at the end of a job, display service dispatch in one-day or five-day increments, and customize work orders with color codes that indicate priority, service area, and type of work to be performed.

With the Sage 100 Contractor Service application, you can:

- Efficiently manage work orders without entering duplicate information to generate invoices and dispatch technicians.
- Easily turn estimates into service work orders with the Estimating Basic application.
- Quickly review information about equipment installed at multiple client sites.
- Efficiently schedule service agreement and warranty work.
- Avoid potential overbookings when notified by warnings on your dispatch board.
- Be alerted of a client's outstanding or past-due balances when scheduling work orders.
- Transfer employee hours from service orders directly to payroll for faster, more accurate processing.
- Plus more!

*Add-on modules are sold separately.

Benefits

- Stay on top of inventory when service work is performed with full integration between Service and Inventory
- Bill items individually or as part of an assembly (kit) for added flexibility
- Use the flat-rate billing option to create and print your own price book for your technicians
- Easily keep your entire system updated by using the same parts and assemblies databases for estimating and for service
- Directly transfer hours from your service work orders to Payroll
- Run truck restocking from work orders completed each day so that your warehouse staff can restock trucks at night
- Effectively manage, monitor, and control costs through integration with accounting and Estimating

Sage 100 Contractor

Customizable, interactive dispatch board

Increase efficiency and customer satisfaction with the comprehensive, easy-to-use dispatch board. Because multiple dispatchers can set appointments on the board simultaneously, you know what the day looks like in real time and can make adjustments if necessary.

By assigning work orders based on client location, priority, technician load, and expertise, you ensure the right technician always gets to the right job at the right time. And when you email work order details, including updates and changes, to your field technicians or subcontractors, you improve information flow and make certain that everyone is in the loop.

Row	Assembly #	Part #	Description	Alpha Part#	Unit	Quantity	Price	Est Quantity	Est Price	Cost Type	Taxable	Account
1	1442 P		1150 Amp Service & Panel		Each	1.0000	350.000000	1.0000	350.00		No	4005 - Service Income
2		16401	250-150 Amp Service		Each	1.0000	1.0000	1.0000	1.00	1 - Material	No	4005 - Service Income
3		5427	84 Vinyl Sinks	LB (90)		0.0396	0.0396	0.0396	1 - Material	No	4005 - Service Income	
4		16296	#00 THW Wire	LF		9.9000	9.9000	1.0000	1 - Material	No	4005 - Service Income	
5		16117	100 Amp Double Pole Breaker		Each	1.0000	1.0000	1.0000	1 - Material	No	4005 - Service Income	
6		16438	#6 Bare Copper Wire	LF		14.5000	14.5000	1.0000	1 - Material	No	4005 - Service Income	
7		16430	1/2" Ground Clamp		Each	1.0000	1.0000	1.0000	1 - Material	No	4005 - Service Income	
8		16414	1/2" Grounding Rod - 10 Ft.		Each	1.0000	1.0000	1.0000	1 - Material	No	4005 - Service Income	
9		141	Electrical Labor		Minutes	2.5000	2.5000	2.5000	2 - Labor	No	4005 - Service Income	
10												
11	3472 A		120 Amp Branch Circuit w/Breaker		Each	1.0000	39.600000	1.0000	39.60		No	4005 - Service Income
12		16314	#12-2 NMC Romex	LF		33.0000	33.0000	1.0000	1 - Material	No	4005 - Service Income	
13		16372	Wire Shape	Box (250)		0.0750	0.0750	1.0000	1 - Material	No	4005 - Service Income	
14		16398	Red Wire Nuts		Each	0.0050	0.0050	1.0000	1 - Material	No	4005 - Service Income	
15		16307	20 Amp Single Pole Breaker		Each	1.0500	1.0500	1.0000	1 - Material	No	4005 - Service Income	
16		141	Electrical Labor		Minutes	0.6000	0.6000	2.0000	2 - Labor	No	4005 - Service Income	
17												

Complete service management capabilities enable you to create dispatches, quotes, work orders, invoices, credits, service routes, and service contracts. And, when you use inventory parts on service calls, the quantities are automatically updated in the integrated Inventory module.

Category	Liz B.	Ron G.	Brandon L.	Daniel W.	Luke W.	Ross
Emergency	15 min	8:00 AM	1 Hr 30 Min Doctor appointment	30 min	8:00 AM	8:00 AM
Urgent	35 Lamb Shoes, Inc Plumbing Megan Stewart 999 555-0550 Springfield Broken Pipe 8:15 AM 1.00 hour	38 Board of Education Pre-Payments Sharon White 999 555-0945 Glen Ellen Service Start-up 8:30 AM 1.25 hours		15 Margaret Fuller Service Margaret Fuller 999 555-6330 Sonoma Start up inspection 8:30 AM 1.00 hour	38 Board of Education Pre-Payments Sharon White 999 555-0945 Glen Ellen Service Start-up 8:30 AM 1.25 hours	25 Lamb Shoes, Inc Service Megan Stewart 999 555-0550 Springfield Service call 8:30 AM 1.50 hours
Prompt	15 min					
Plumbing	37 George Olson Maintenance George Olson 707 582-9936 Sebastopol HVAC 9:30 AM 1.25 hours	36 Margaret Fuller Clean up Margaret Fuller 999 555-6330 Sonoma Vent Maintenance 10:15 AM 1.00 hour	44 City of Modesto Roofing Dennis Sullivan 620 555-9783 Modesto Monthly Service 9:30 AM 1.00 hour	20 Hotel, Inc Electrical Sandra Turner 999 555-7772 Reno Monthly service 10:00 AM 1.25 hours	41 Hotel, Inc Maintenance Sandra Turner 999 555-7772 Reno Lighting Service 10:00 AM 1.00 hour	36 Margaret Fuller Clean up Margaret Fuller 999 555-6330 Sonoma Vent Maintenance 10:15 AM 1.00 hour
Electrical	15 min	15 min	15 min	15 min	15 min	15 min
Drywall	43 George Olson Roofing George Olson 707 582-9936 Sebastopol Roof Inspection 11:00 AM 1.00 hour	1 Hr Lunch	14 Postmaster - Williams HVAC John Clark 999 555-2589 Monte Rio Noise from unit 10:45 AM 1.00 hour		1 Hr Lunch	42 Lamb Shoes, Inc Pre-Payments Megan Stewart 999 555-0550 Springfield Initial Service Inspection 11:30 AM 1.00 hour
Undefined	1 Hr Lunch	1 Hr Lunch	1 Hr Lunch	1 Hr Lunch	30 min	1 Hr Lunch
Undefined	15 min	5 City of Barstow Service Matt Tucker (999) 555-2222 Barstow System startup 12:30 PM 1.00 hour	15 min	15 min	39 Lamb Shoes, Inc Plumbing Megan Stewart 999 555-0550 Springfield AC replacement 12:30 PM 1.00 hour	1 Hr Lunch
	26 City of Barstow HVAC Matt Tucker (999) 555-2222	30 min	40 Margaret Fuller	41 Hotel, Inc Maintenance Sandra Turner 999 555-7772	15 min	15 min

Quickly determine the service area, type of work scheduled (preventive, maintenance, subcontract, or other), and priority (emergency, urgent, or prompt) with color coding to keep your service team running smoothly.

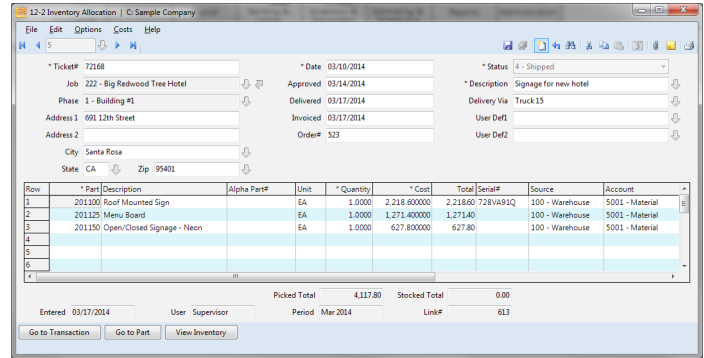
Sage 100 Contractor

Inventory

The Inventory module helps you track all inventory movement and transactions, whether the inventory is planned or left over from a job, so you maintain the right stock levels while reducing costs and eliminating waste. Multiple reports, such as Inventory Allocation, Allocation List, Quantity on Hand, Value Report, Inventory Ledger, and Stock Location Report, keep you informed and also protect valuable assets.

With the Sage 100 Contractor Inventory application, you can:

- Take the guesswork out of ordering and stocking by producing reorder reports.
- Accurately track inventory, whether for a central warehouse, for several locations, and/or for service trucks.
- Easily manage basic stock and serialized items for all locations, bin numbers, Materials Safety Data Numbers (MSDN), and manufacturer identifications.
- Create a real-time snapshot when you apply inventory to a job, reprice inventory, post shrinkage, or create finished goods inventory from stock items and labor.
- Choose your preferred inventory valuation method using LIFO, FIFO, or Average Cost.
- Conveniently restock trucks anytime with automated restocking reports.
- And more!



Easily track inventory movement between locations, place stock on hold, and automatically generate inventory reorder reports.

Inventory Ledger

06/27/14

Managed Rite Construction

Inventory Ledger
Period 05 (May 2014) to 06 (Jun 2014)

Record#	Part#	Description	Source	Transaction#	Date	Location#	Description	Unit	Beg Quantity	Qty Balance
	5561	Condenser Fan Motor 1861						Each		
211	API/Inv	789548		789548	06/11/2014	100	Warehouse		4.0000	4.00
212	API/Inv	859674		859674	05/15/2014	100	Warehouse		4.0000	8.00
214	API/Inv	485961		485961	06/01/2014	100	Warehouse		4.0000	12.00
	5569	2 Ton R22 Reciprocating Compressor Heat Pump Pack						Each		
211	API/Inv	789548		789548	06/11/2014	100	Warehouse		1.0000	1.00
212	API/Inv	859674		859674	05/15/2014	100	Warehouse		1.0000	2.00
214	API/Inv	485961		485961	06/01/2014	100	Warehouse		1.0000	3.00
	5571	1/6 HP 825 RPM 208/230 Volt Condenser Fan Motor-						Each		
211	API/Inv	789548		789548	06/11/2014	100	Warehouse		3.0000	3.00
212	API/Inv	859674		859674	05/15/2014	100	Warehouse		3.0000	6.00
214	API/Inv	485961		485961	06/01/2014	100	Warehouse		3.0000	9.00
	5572	1/5 HP 825 RPM 208/230 Volt Condenser Fan Motor						Each		
209	API/Inv	568911		568911	05/01/2014	100	Warehouse		5.0000	5.00
210	API/Inv	589674		589674	06/11/2014	100	Warehouse		5.0000	10.00
211	API/Inv	789548		789548	06/11/2014	100	Warehouse		5.0000	15.00
212	API/Inv	859674		859674	05/15/2014	100	Warehouse		5.0000	20.00
214	API/Inv	485961		485961	06/01/2014	100	Warehouse		5.0000	25.00
	5573	IGNITION CONTROL KIT						Each		
209	API/Inv	568911		568911	05/01/2014	100	Warehouse		2.0000	2.00
210	API/Inv	589674		589674	06/11/2014	100	Warehouse		2.0000	4.00
211	API/Inv	789548		789548	06/11/2014	100	Warehouse		2.0000	6.00
212	API/Inv	859674		859674	05/15/2014	100	Warehouse		2.0000	8.00
214	API/Inv	485961		485961	06/01/2014	100	Warehouse		2.0000	10.00
	5574	RUN CAPACITOR 5 MFD 370 VAC						Each		
209	API/Inv	568911		568911	05/01/2014	100	Warehouse		3.0000	3.00
210	API/Inv	589674		589674	06/11/2014	100	Warehouse		3.0000	6.00
211	API/Inv	789548		789548	06/11/2014	100	Warehouse		3.0000	9.00
212	API/Inv	859674		859674	05/15/2014	100	Warehouse		3.0000	12.00
214	API/Inv	485961		485961	06/01/2014	100	Warehouse		3.0000	15.00

Report 12-1-3-41
Supervisor

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02:34 PM

Take control of your inventory with the ability to track materials by serial number, easily generate restocking reports, and efficiently manage multiple warehouses and service trucks.

Sage Construction and Real Estate

15195 NW Greenbrier Parkway | Beaverton, OR 97006 | 800-628-6583 | www.SageCRE.com