Sage 100 Contractor

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.

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c	Order# 49		* Client#	135 - Fuller			4.0	* Status	7 - Work Order		•	
Inv	oice# 🔢		* Description	Replace circuit bre	akers		J.	*Type	5 - Service		- a	
	* Date 03/14/20			201 - Trappen Mo	tel		合合		Lock Edit			
	Dispatch Billing			-		,						
Row	Assembly# K	Part# * Descrip		Alpha Part#	Unit	Quantity		Ext Quantity			le Account	
2	3462 P		p Service & Panel		Each		350.000000	1.0000		No	4005 - Service Income	
2	R R	16101 250-150			Each	1.0000		1.0000		No	4005 - Service Income 4005 - Service Income	
3	n n	5427 8d Vinyl 16298 #00 THV			LB (90)	9,9000		0.0396		No	4005 - Service Income 4005 - Service Income	
4	R R		Double Pole Breaker		Each	1.0000		1,000		No	4005 - Service Income 4005 - Service Income	
6	R.	16419 #6 Bare 0			LE	16,5000		16,5000		No	4005 - Service Income	
2	R.	16420 1/2" Gro			Each	1.0000		1.0000		No	4005 - Service Income	
8	R.		unding Rod - 10 Ft		Each	1.0000		1.0000		No	4005 - Service Income	1
9	5	241 Flectrical			MoHrs	2,5000		2.5000		No	4005 - Service Income	
10		242 010001020				1.5000				140		
11	3472 A	120 Amo	Branch Circuit w/Breaker		Each	1.0000	39,600000	1,000	39.60		4005 - Service locome	
12	K	16314 #12-2 N			LF	33,0000		33.0000	1 - Material	No	4005 - Service Income	
13	5	16372 Wire Star	oles		Box (250)	0.0750		0.0750	1 - Material	No	4005 - Service Income	
14	R	16358 Red Wire	Nuts		Each	0.0050		0.0050	1 - Material	No	4005 - Service Income	
15	R.	16107 20 Amp	Single Pole Breaker		Each	1.0500		1.0500	1 - Material	No	4005 - Service Income	
16	ĸ	241 Electrical	Labor		MnHrs	0.6000		0.6000	2 - Labor	No	4005 - Service Income	
<					_							
		Grid Total	Markup %	Markup S		Total Markup	Exte	inded Total	Billing Amount			
Taxable		10.00						0.00				
Non-Tax	able	389.60	10.00			38.96		428.56	428.56	3		
Disc Ava	a	Deposit		Sales Tax			Taxable		br	voice Total	428	
Disc/Cred	R .		Paid	T	otal Paid			Non-Taxab	sle 428.56		Balance	428
											Net Due	428
Entere	d 03/17/2014		User Supervisor		Period			Edit Lini	k#		Link#	

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.

🏹 11-3 Dispatch Board C: Sample Compar	ıy] _>
<u>File Options S</u> ettings <u>H</u> elp							
📢 🖣 Friday, March 14, 2014	🐥 🕨 🍽 🛛 Go to Today					1 day 5 days 🕒 100% 🕂	🛅
All Unassigned	Liz B.	Ron G.	Brandon L.	Daniel W.	Luke W.	*Ross	
Emergency 2 * 🗆	15 min	8:00 AM	1 Hr 30 Min Doctor appointment	30 min	8:00 AM	8:00 AM	
11 Lamb Shoes, Inc Electrical Megan Stew 18 Hotel Inc HVAC Sandra Turner 999 555	35 Lamb Shoes, Inc	15 min					
Urgent 1 * 🗆	Plumbing Megan Stewart	38		15	38	25	
12 City of Modesto Service Dennis Sullivar	999 555-0550 Springfield Broken Pipe	38 Board of Education Pre-Payments Sharon White 999 555-0945 Glen Ellen		Margaret Fuller Service Margaret Fuller 999 555-6330	38 Board of Education Pre-Payments Sharon White 999 555-0945 Glen Ellen	Lamb Shoes, Inc Service Megan Stewart 999 555-0550	
Prompt 1 * 🗆 '	8:15 AM 1.00 hour	999 555-0945 Glen Ellen	-	Sonoma	999 555-0945 Glen Ellen	Springfield	-
17 Board of Education Service Sharon Whi	15 min	Service Start-up 8:30 AM 1.25 hours		Start up inspection 8:30 AM 1.00 hour	Service Start-up 8:30 AM 1.25 hours	Service call 8:30 AM 1.50 hours	
Plumbing 2 * 🗆 .		-		30 min	-		
21 Margaret Fuller HVAC Margaret Fuller 22 Lamb Shoes, Inc Service Megan Stewar	37 George Olson Maintenance		44 City of Modesto Roofing	50 min	15 min		
Electrical 1 * 🗆	George Olson 707 582-9936		Roofing Dennis Sullivan 620 555-9783				
23 City of Modesto Electrical Dennis Sulliv	Sebastopol HVAC 9:30 AM	15 min	Modesto Monthly Service 9:30 AM 1.00 hour	20 Hotel Inc	41 Hotel Inc	15 min	Ini
Drywall 1 * 🗆	1.25 hours	36	1.00 hour	Electrical Sandra Turner	Maintenance Sandra Turner	36	
6 Lamb Shoes, Inc. Service. Megan Stewart		Margaret Fuller Clean up Margaret Fuller 999 555-6330	15 min	999 555-7772 Reno Monthly service 10:00 AM 1.25 hours	999 555-7772 Reno Lighting Service 10:00 AM	Margaret Fuller Clean up Margaret Fuller 999 555-6330	
Undefined 1 🕆 🗆	15 min	Sonoma Vent Maintenance	14	1.25 hours	1.00 hour	Sonoma Vent Maintenance	
19 City of Barstow Service Matt Tucker (9)	43 George Olicon	10:15 AM 1.00 hour	Postmaster - Williams HVAC John Clark 999 555-2589		1 Hr Lunch	10:15 AM 1.00 hour	
Undefined * 🗆	George Olson Roofing George Olson 707 582-9936	1 Hr Lunch	Monte Rio Noise from unit			15 min	1
	707 582-9936 Sebastopol		10:45 AM 1.00 hour		-		
	Roof Inspection 11:00 AM		1.00 1001			42 Lamb Shoes, Inc	
	1.00 hour					Lamb Shoes, Inc Pre-Payments Megan Stewart 999 555-0550	
	1 Hr Lunch		1 Hr Lunch	1 Hr Lunch	30 min	Springfield Initial Service Inspection 11:30 AM 1.00 hour	
		15 min				1.00 hour	
		5 City of Barstow Service Matt Tucker			39 Lamb Shoes, Inc Plumbing Moon Stougt	1 Hr Lunch	
	15 min	(999) 555-2222 Barstow	30 min	15 min	Megan Stewart 999 55-0550		
	15 min	System startup	50 min	15 min	Springfield AC replacement 12:30 PM		
	26	12:30 PM 1.00 hour		41	1.00 hour		
	City of Barstow HVAC Matt Tucker	30 min	40	Hotel Inc Maintenance Sandra Turper	15 min	15 min	Í
	Matt Tucker (000) 555-2222		40 Margaret Fuller	Sandra Turner			

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!

12-2 Inventory Allocation | C: Sample Edit Options Costs 🗃 🥔 🎦 🖣 🐴 * Ticket# 72168 * Status 4 - Sh * Date 03/10/2014 Job 222 - Big Redwood Tree Hotel Approved 03/14/2014 * Description Signage fo Delivered 03/17/2014 Delivery Via Truck 15 Phase 1 - Building #1 Address 1 691 12th Stree Invoiced 03/17/2014 User Def1 Order# 523 User Def2 Address 2 City Santa Rosa State CA 🐥 Zip 95401 * Part Description 201100 Roof Mounter 201125 Menu Board 201150 Open/Closed Unit * Quantity EA 1.0000 Total Serial# 2,218.60 728VA91Q Account shouse 5001 - Materi shouse 5001 - Materi ted Sign 1.0000 1,271.400000 1.0000 627.800000 1,271.40 Picked Total 4,117.80 Stocked Total 0.00 ed 03/17/2014 Hear Sur Mar 2014 613 Go to Tran saction Go to Part View Inventory

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

Description cce Transaction Condenser Fan Motor 789548 v 859674 v 485961 2 Ton R22 Reciprocati 789548 v 789548 v 789548 v 485961	1861 06/11/2014 05/15/2014 06/01/2014		Each	4.0000 4.0000 4.0000	Quantity Qty Balance 4.00 8.00
v 789548 v 859674 v 485961 2 Ton R22 Reciprocati v 789548 v 859674	06/11/2014 05/15/2014 06/01/2014 ng Compressor Hea 06/11/2014	100 Warehouse 100 Warehouse Pump Pack	Each	4.0000	8.00
v 789548 v 859674 v 485961 2 Ton R22 Reciprocati v 789548 v 859674	06/11/2014 05/15/2014 06/01/2014 ng Compressor Hea 06/11/2014	100 Warehouse 100 Warehouse Pump Pack	Each	4.0000	8.00
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v 485961 2 Ton R22 Reciprocati v 789548 v 859674	06/01/2014 ng Compressor Hea 06/11/2014	100 Warehouse Pump Pack			
v 789548 v 859674	06/11/2014				12.00
v 789548 v 859674	06/11/2014		Each		
	05/15/2014	100 Warehouse		1.0000	1.00
v 485961		100 Warehouse		1.0000	2.00
	06/01/2014	100 Warehouse		1.0000	3.00
1/6 HP 825 RPM 208/	230 Volt Condenser	Fan Motor-	Each		
v 789548	06/11/2014	100 Warehouse		3.0000	3.00
	05/15/2014	100 Warehouse		3.0000	6.00
v 485961	06/01/2014	100 Warehouse		3.0000	9.00
1/5 HP 825 RPM 208/	230 Volt Condenser	Fan Motor	Each		
v 568911	05/01/2014	100 Warehouse		5.0000	5.00
	06/11/2014	100 Warehouse		5.0000	10.00
					15.00
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v 485961	06/01/2014	100 Warehouse		5.0000	25.00
			Each		
					2.00
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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.

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