Service Order Processing

Service Transaction Entry

- Multi-branch support with transactional isolation.
- Quote, Order, and Invoice document processing.
- Specify document formats by branch, service type, or customer.
- Master document support with sequential back order numbering.
- Accounting by branch and division with multicurrency support.
- Full support for corrective and recurring preventive maintenance.
- Contract coverage with CM and PM resource pricing options.
- Partial billing with service line backorder support.
- Fixed fee, time & materials, and non-billable service types.
- Service levels, priority management and late-response alerts.
- Team dispatch and scheduling with data collection by resource.
- Document workflow with in-process holds.
- Optional task verification for workflow and service operations.
- Markdowns and trade discounts by amount or percentage.
- Use *Dynamics GP* **t**ax engine or *Avalara* tax web service.
- Salesperson, territory, and commission support.
- GAAP compliant work-in-process (WIP) accounting.
- Online profitability inquiry and analysis.
- System and user-defined document status control.
- Service completion with duration and problem/resolution entry.
- Real-time or batch transaction processing.
- Window level notes, comments, online help, and sorted browser.

Service Dispatch & Scheduling

- Multi-branch and multi-division support with transactional isolation.
- Schedule & unschedule orders using drag and drop technology.
- Sort, search and select orders by document, name, and address.
- Quickly locate resource availability by date and time.
- Unlimited dispatch notes with user, date, and time stamp.
- Restrict resource list by skills and certifications.
- Gantt style schedule with timebar resizing and highlighted ruler.
- Dead zones to ensure branch and resource availability.
- Conflict management to prevent scheduling errors.
- Calendar first day of the week override by user at runtime.
- Default schedule time span override by user at runtime.
- Schedule start time override by user at runtime.
- Alternate line color option override by user at runtime.
- Display time lines option override by user at runtime.
- Vertical thumb track option override by user at runtime.
- Instant update and access to the service transaction document.
- Window level notes and online context-sensitive help.

CM = Corrective Maintenance
PM = Preventive Maintenance

Service Transaction Entry - Resources

- Multi-site inventory by branch.
- Multi-bin materials inventory for truck and van stock.
- Material, vehicle, technician, tool, team & miscellaneous resources.
- Stock and non-stock resource items.
- Serialized and lot controlled material resource items.
- Alternate units of measure with price differentials.
- Purchasing, receiving and site/Bin transfer support.
- Price level support by customer.
- Multi-tier resource item price lists by currency type.
- Sales to gross profit visibility by service.
- Resource time entry with optional task verification.
- Resource back order fulfillment via bin transfer or purchase order.
- Automatic financial account assignment with user override.
- Contract coverage limits with price level and rate type adjustments.
- Enter material, vehicle, technician, tool, team, misc. by service line.
- On-the-fly inquiry into item, site, bins, serial and lot numbers.
- Drill-down support for covered item, service, resource and price.
- Window level notes and online context-sensitive help.

Service Billing

- Multi-branch with accounting by division and/or branch.
- Automatic batch numbering from system date and time.
- Post to or through Dynamics GP sales order processing.
- Filter invoice selection using an array of restriction options.
- Display all, included, or excluded invoices.
- Print comprehensive edit listing to ensure accurate posting.
- Multicurrency with originating and/or functional amounts.
- Sort scrolling window by document number or customer ID.
- Option to include or exclude zero dollar invoices from printing.
- Assign and print different invoice format for each customer.
- Print and/or send invoice document via email as a PDF file.
- Print optional pick ticket and/or packing slip.
- Reprint previously printed invoices.
- Print to include dual currency taxes in detail or summary
- Customize windows and documents via *Microsoft Modifier*.
- Identify and view on-hold invoices not eligible for billing.
- Drill-down support for customer, address, service area, & document.
- Window level notes and online context-sensitive help.

Service Payment Entry

- Multi-tender support for cash, check, credit card and eCheck.
- Support for deposits, payments and COD amounts.
- Automatic financial account assignment with override at runtime.
- Fully integrated PA-DSS compliant credit card processing.
- Easily accept major credit cards, debit cards, and eChecks (ACH).
- Secure tier 1 payment gateway powered by *BluePay.*
- Authorization, capture, sale, refund and void transaction types.
- Single-transaction or batch credit card processing.
- Advanced risk tools include E2EE, tokenization, AVS, and CVV2.
- Support for auto-pay, point of sale (POS), and web interface.
- Separate credit card and eCheck wallets by customer and address.
- Holds placed on credit card declines, holds, errors, & uncaptured.
- Multicurrency support with separate merchant accounts.
- Print and/or email credit card receipt to card holder.
- Drill-down support for checkbook and distribution accounts.
- Window level notes and online context-sensitive help.

PureLogic™