

The Service Manager

Feature & Price Guide



Editions		
Basic	Business Essentials	Advanced Management

Customer Center

► All information is at your fingertips including; contacts, site inventory (i.e. assets, equipment etc.), service history, service schedules, unlimited notes, and customer information.	✓	✓	✓
► Integrated with Microsoft Office (Word, Outlook and Excel) to increase productivity.	✓	✓	✓
► Manage requests and complaints from problem through corrective action.	✓	✓	✓
► Manage leads and track sales opportunities in your sales pipeline.		✓	✓
► Keep track of sales targets, quotes, and customer care issues with a customizable scorecard.		✓	✓

Field Service

► Create, manage, and schedule work orders. Handle basic and complex situations including the ability to manage multiple technicians, resources, appointments, assets, and service activities.	✓	✓	✓
► Track labor, materials, subcontractors, travel, and other expense details.	✓	✓	✓
► Manage installations, warranty/replacements, planned maintenance, and customer service and more.	✓	✓	✓
► Create service invoices(5).	✓	✓	✓
► Track revenue and costs by user definable categories such as labor, materials, and subcontractors.	✓	✓	✓

Scheduling and Route Planning

► View all open service requests real-time with the ability to reschedule the date and time, or reassign technicians and resources.	✓	✓	✓
► Automatically generate maps and driving directions via integration to Microsoft MapPoint® (3) and create detailed "route books".	✓	✓	✓
► Automate service route planning and scheduling.	✓	✓	✓
► Integrates with "Territory Planner" by UPS Logistics (7).		✓	✓

Contract Administration

► Create estimates and quotes for installation, and planned maintenance. Create multiple contracts per site and offer multiple services per contract.	✓	✓	✓
► Multiple estimating and cost tracking methods including mark-up on cost and activity or unit based costing.	✓	✓	✓
► Create and manage standard estimating factors for inventory items (examples: <i>labor to install, labor & materials for planned maintenance, kits and more</i>).	✓	✓	✓
► Create proposals from standard or customized formats (including optional digital picture integration (1)).	✓	✓	✓
► Automatically create installation work orders from quotes.	✓	✓	✓
► Generate invoices for recurring services (5).		✓	✓

Continued...

The Basic Edition is focused on the needs of newly emerging service organization with a small number of users.

The Business Essentials Edition "steps up" to meet the more complex needs of established service organizations with many users and business processes. The Business Essentials Edition is available as a standard field service solution or configured to meet the specific needs of several industries.

The Advanced Management Edition features the ability to manage larger organizations managing multiple branch offices, territories or cost centers in a common database. The Advanced Management Edition is available as a standard field service solution or configured to meet the specific needs of several industries.

Editions		
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Project Accounting (Job Cost)

- Report and analyze profitability by contract and track costs by category (i.e. labor, materials, subcontractors, etc.)
- Track jobs with a work breakdown structure that allows you to configure jobs in phases, steps and details.
- Billing schedules for projects allow you to partial bill work and tailor invoices to meet customer needs.

✓
✓
✓

Internet-Based Customer Portal (2)

- Provide select customers with easy Internet-based access to information in a secure, controlled environment.
- Customers can open new service requests via the Internet 24/7 and view scheduled work orders, site inventory, contracts, service history, and more.

Available Separately

✓
✓

Internet-Based Employee Portal (2)

- Provide employees with secure, easy Internet-based access to customer information.
- View and update service work orders, record time and expense.

Available Separately

✓
✓

Reporting & Manager's Dashboard

- Standard reports. Reports can be customized as needed (4).
- Manager's Dashboard elements display performance measurements in an easy to use graphical display.

35 50 50
5 15 15

Multi-site / Branch Offices / Organizational Unit

- View, organize and report on data by branch office, organizational unit or profit-center.

✓

Accounting System Integration

- Share live, real-time customer and inventory data with your accounting system. Create accounting transactions including invoices from the Service Manager (5).
- Integrates with Microsoft Dynamics GP (formerly Great Plains), QuickBooks Enterprise, and SAP Business One.
- Integrates with QuickBooks Pro and Premier.

✓ ✓ ✓
✓ ✓ ✓
✓ ✓ ✓

License Options

- Maximum number of concurrent users

Five No Limit No Limit

Pricing

Option #1: Premise or cloud installation

- **System License** (includes one concurrent user license) \$995 \$1,995 \$3,495
- **Additional Users** (per user, concurrent user license) \$595 \$1,195 \$1,195

- **Annual Care Plan** - Several plans are available to obtain technical support services & software maintenance. See the Annual Care Plan brochure or our website for details.

From \$677 From \$698 From \$1,223

(Annual Care Plan price shown is based on a single user license. The cost of an annual care plan is calculated as a percentage of current system plus user licenses.)

Option #2: Cloud hosted service

- **Monthly Fee** - includes user license & care plan. (Cloud/hosting platform fees not included) n/a \$82 per user \$82 per user

Professional Services: Installation, data conversion, report customization, and training services are available

Quoted as requested

Notes:

1) Digital images not included.

2) Can integrate with your existing web site or as a stand-alone site. May require additional assistance from Shining Brow Professional Services.

3) Requires Microsoft MapPoint (sold separately).

4) Customization requires Business Objects - Crystal Reports (sold separately).

5) Invoicing integration for the Basic Edition is only available for QuickBooks Pro and Premier. Invoice integration capabilities vary by accounting system.

6) The Service Manager can run with Microsoft SQL Server Express which is generally designed to support between 5 and 8 users (free download). For larger installations The Service Manager requires Microsoft SQL Server (not included). Adequate computer hardware, network and operating systems are required for optimal performance. Visit the frequently asked questions section of our web site for hardware and operating system requirements.

7) Sold separately

Prices are in US Dollars

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