

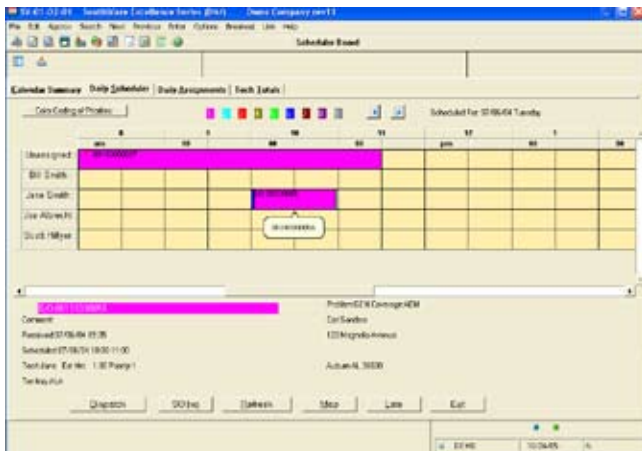
# Service Orders

Service orders are the heart of your service business. You need to take your customer requests quickly, schedule normal service calls, get the work assigned, keep track of the status of the work, and get the work billed when it's done. Your solution to all these needs is SouthWare's Service Orders.

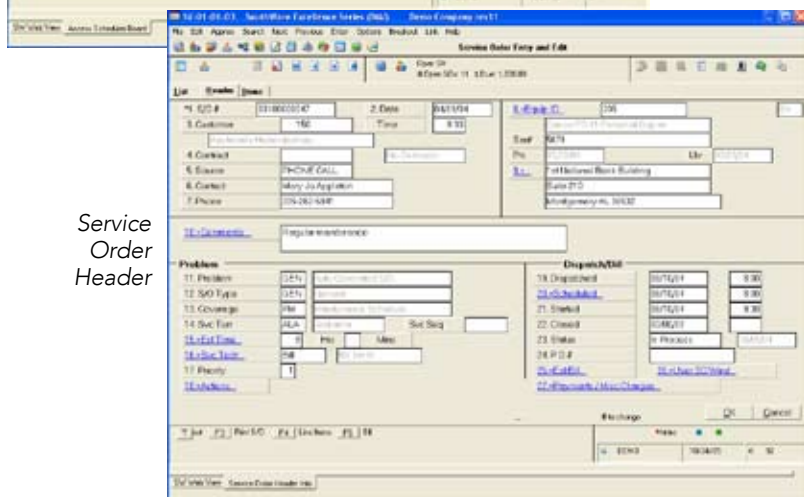
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## BENEFITS

### SERVICE MANAGEMENT



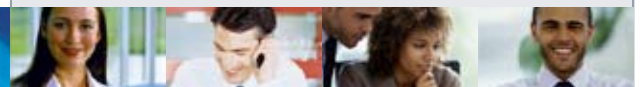
Service Scheduler Board



Service Order Header

- Quickly record the important facts about every request for service
- Efficiently handle both your regularly scheduled and your on-demand service requests
- Get the right technician dispatched or assigned to a service order
- Know the current status of each service order and know which ones need special attention
- Quickly record the parts and services used on a service order
- Ensure that a service order is billed accurately and promptly
- Know the service history of each customer and piece of equipment
- Make sure that fees such as travel or zone charges are charged when appropriate
- Eliminate errors by ensuring that contract rates, limits, and coverages are automatically considered on service orders
- Instantly answer your customers' questions about the status and details of the work being done for them
- Evaluate the work being done by each of your technicians and service locations

Service Orders handles the service order functions for SouthWare's Service Management Series, a complete system for service businesses. With Service Orders you get the help you need to record, dispatch, schedule, track, assign, and close service orders with minimum work and maximum results.



## Features & Functionality

### Service Order Info

- Extensive standard info
- Security, defaults, and other options may be configured per operator
- Option for multiple service locations
- Option to add a new customer
- Service history for customer or equipment
- Indicate equipment to be serviced
- Interface with Vendor Returns
- Interface with Customer Returns
- Problem description, problem codes
- Estimates, comments, and actions taken
- Track dates and times for each step
- Option to service multiple equipment on one service order
- Multiple technicians per service order
- Subtotals for parts, labor, other charges
- Billing percent per line item considers equipment warranty and contract coverage
- Access preventive maintenance schedules
- Record meter readings
- Commit parts from Inventory Control
- Notes, text, and optional Extended Data

### Dispatching Features

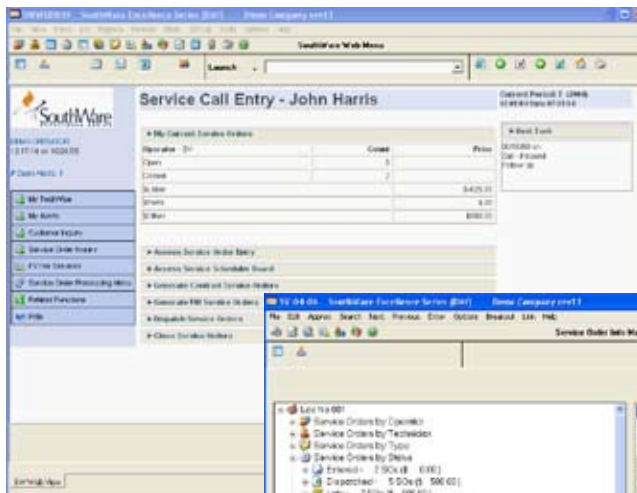
- Display service orders to be dispatched along with a list of possible technicians
- Check technician skills, territory, priority
- Multi-View Scheduler Board

### Integration with Contracts and Equipment

- Consider contract limits and coverage
- Check equipment covered by contract
- Relate each service to equipment
- Integrate PM schedules and meter reading
- Exchange/loan/rent equipment

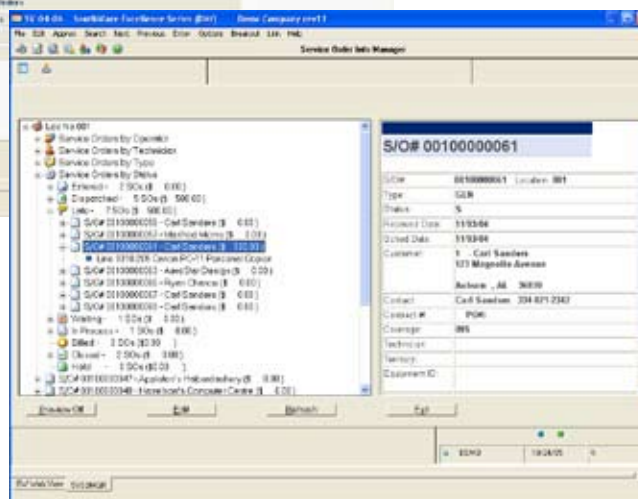
### Billing Features

- Partial or full billing of a service order
- Closing function for travel/other charges
- Batch or interactive invoices



Service Order Operator Portal

Service Order TreeView Manager



### Management and Reporting

- Service Order inquiry
- Current status/schedule reports
- Service order analysis reports

### Service Orders helps you answer such questions as:

- Are there any service requests that have not yet been dispatched?
- What's the status of this service order?
- What actions has Joe already taken on this service order and what parts has he used?
- What has been our average repair time over the last six months for this type of problem?
- What other service work have we done for this customer lately?
- Do any of our technicians seem to have a productivity problem?
- How can we make sure that Joe gets assigned to all service calls for this type of equipment?

- How do we make sure that our service contract customers get higher priority than other customers?
- How do we separate the non-billable and the billable work on this service order?
- How long did it take us to complete this service call?

**BTM Solutions, Inc**  
SOFTWARE SOLUTIONS. THE RIGHT WAY. THE RIGHT PEOPLE.

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