

Service Manager provides you with an effective means to plan, control, organize, operate and manage the products and services that your business has to offer.



Service [®] Manager

Integrates with ACCPAC Advantage Series

Technisoft is a senior **ACCPAC Development Partner**, and has been matching organizations and people with Service Management software solutions all over the world for over **fifteen years**.

Service Manager, Technisoft's flagship product, has been the recipient of **multiple** "ACCPAC Product of the Year" awards.

See how Service Manager can provide your business with the financial and managerial tools necessary to **maximize revenues, minimize costs, and control your resources**.

Our commitment to ongoing **research and development protects your investment**. By ensuring your software has the flexibility to meet future industry demands, we enable your business to continue to provide a superior level of customer service whilst maintaining profitability.

The Technisoft team of **dedicated professionals** is committed to "**exceeding your expectations**" and providing you with high levels of after sales support. Take the challenge, and ask us to arrange for you to speak to some of our many happy customers.

Customer Profile

If you are involved in an industry such as contracting, job cost management, maintenance, equipment servicing, office automation, telecommunications, or any other service industry then your business can be one of the many to benefit from deploying a Service Manager solution.

If you are a **large business** with multiple locations in a global market place, require multi currency and branch accounting, tax support and the ability to add unlimited employees, Service Manager can meet your requirements.

If your business is **medium-sized**, with the need for feature-rich sophistication, ease of use, and technologically advanced solutions including mobile and internet applications, Service Manager can meet your requirements.

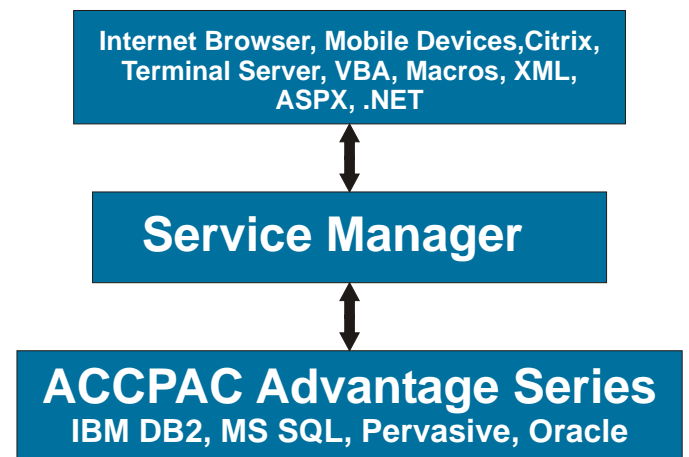
If your business is a **small organization**, but you require a solution that can evolve with your needs, Service Manager can meet your requirements.

Product Scalability across the ACCPAC Advantage Series range allows Service Manager to grow with your business, further protecting your software investment.



World Class Architecture

Service Manager is designed using ACCPAC's world class object-oriented, multi-tiered architecture, making it adaptable to emerging applications, operating systems, databases, and technologies. Our advanced design and integration with ACCPAC means that Service Manager is scalable, customizable and adaptable to new paradigms such as application hosting and end to end e-business solutions.



Technisoft Support

Technisoft SupportPlus Software Assurance is an annual maintenance subscription plan which has been specifically designed to keep your software up-to-date and provide easily accessible and timely technical support.

Annual software updates provide you with the latest features and technology, ensuring your software stays up-to-date with market trends and business processes.

The SupportPlus program provides you with a means to **budget for your annual software expenditure**.

Regular communication via “QuickNews” email bulletins, Website forums and our online knowledge base are just some of the mediums we use to deliver support or news on product information about Service Manager.

We understand that no two businesses are the same, and therefore provide direct access to our development staff allowing you to log **new function requests** for personalized work.

Technisoft SupportPlus entitles you to a 30% discount on any **custom development** work undertaken on your behalf.

Support issue management ensures that if you log a support request via e-mail or at our web site forum, we will manage and follow it up with both you and your ACCPAC Business Partner to ensure a quick resolution to your issue.



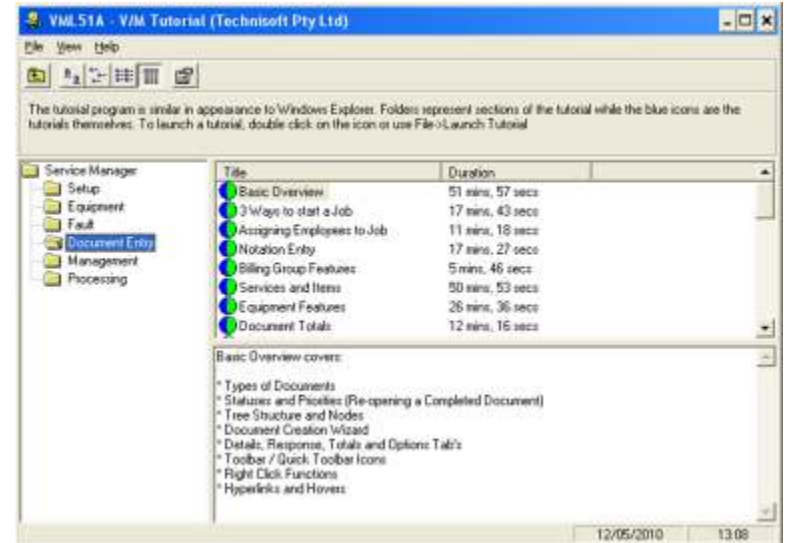
You may participate in our customer support forums.

As part of the SupportPlus program, you will be advised via automatic email notification when updates or upgrades are available for download from our Website.

Training Aids

Technisoft provides digital **training videos**, and a **training guide** to help ensure that you get the most out of your Service Manager software.

We regularly conduct seminars with your ACCPAC Business Partner in order to maintain their skill base so that as upgrades are delivered to you, you can take full advantage of any new features.



Consider these benefits:

- The ability to **control** your entire business from a single point within an **integrated accounting solution**.
- **Critical analytical business information is readily available** to you at all times.
- **Save time and money** by effectively managing your labor scheduling, stock availability, job profitability, RMAs, site equipment records, and most importantly manage your relationship with your customers.
- You can create Service Level Agreements, Warranty Agreements, and Meter Agreements **to monitor and support your customers**.
- You can use the fault analysis tools to provide a **quick and easy** method to diagnose symptoms and ascertain appropriate solutions each time a fault is reported or a question is asked.
- **Real-time updates of jobs from the field** using devices such as smart telephones, PDAs, tablets or notebooks.
- **Better management, better control, better information ... Better profitability and service!**

Major functional areas in Service Manager include...

			
Jobs	Employees	Equipment	Agreements
			
Return Authorizations	Faults	Query Tools	Online Solutions



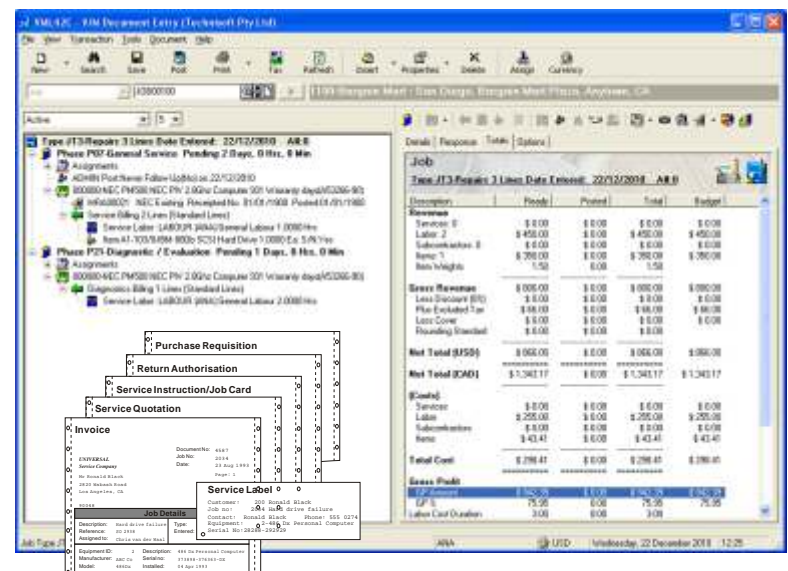
Jobs

The Job System is the core component of Service Manager.

- Create templates, quotations, jobs and projects. These can contain multi-level work structures with phases and sub phases. There is no limit to how many of these can be setup, and all information is summarized at each level in the structure providing profit analysis, so that a snapshot of the job and its profitability can be viewed real-time on screen.
- A simple to use Copy function allows you to quickly create new jobs from quotes, copy templates to jobs, or even copy existing jobs to other jobs. If copying a quote to a job, the quote can be set as the budget for the job it is being copied to.
- Specify Job Types, Statuses, Priorities, or Descriptions. These can all be tailored to your requirements. Customize your numbering system for documents such as projects, jobs, quotes, sales orders, and templates.
- Transactions that can be processed include:
 - Labor allocation
 - Inventory issues, receipts
 - Purchase requisitions and orders
 - Equipment
 - Sub-contractors
 - Standard charges
 - Burden and overhead allocation
 - Invoices, credit notes, cost only entries

Multiple invoices can be processed on a job. You may preview invoices before posting. Receipted Purchase Orders can be auto supplied to a job at receipted cost allowing you to maintain special buy prices.

- Create Maintenance Jobs (standard, conditional and recurring). Apply schedules such as daily, monthly, quarterly, half-yearly or yearly. You can even specify a particular day of the week or create your own complex scheduling formula.
- Charge rates include base, employee, model and site specific rates (revenue and cost). You can even specify price lists or special discount levels.
- A Multi-Post function allows you to filter, select and batch-post large volumes of invoices. These may be edited prior to posting and emailed, faxed or printed.
- Notations are time stamped, and can include file attachments such as graphics, documents, drawings, contracts, email and web-links. Notations also include a follow-up flag for something needing attention. On a given date and time, this follow-up will raise itself as an alert through the system monitor function, or via an email to the responsible person. Notations can also contain predefined checklists and these can be re-used as templates.
- Check customer account status. Quickly create a new customer or edit an existing customer's details as required. Associate multiple sites (geographic locations) to the same accounts receivable customer code. This allows billing to be directed to a parent company or head office.
- All financial information is maintained with the job and this includes estimate, actual and variance for costs, revenue and quantities.



The screenshot displays the 'Job Details' window for a job titled 'Phase P23 General Service'. The window includes a 'Job' summary table and a 'Job Details' section with a flowchart.

Description	Revenue	Cost	Profit	Total	Budget
Service	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Labor	\$ 450.00	\$ 0.00	\$ 450.00	\$ 450.00	\$ 450.00
Subcontractor	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Items	\$ 700.00	\$ 0.00	\$ 700.00	\$ 700.00	\$ 700.00
Item Weight	1.50	0.00	1.50		
Green Revenue	\$ 000.00	\$ 0.00	\$ 000.00	\$ 000.00	\$ 000.00
Less (Discounts) (B/C)	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Plus Excluded Tax	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Less Cover	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Rounding Shortfall	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Net Total (\$USD)	\$ 000.00	\$ 0.00	\$ 000.00	\$ 000.00	\$ 000.00
Net Total (\$CAD)	\$ 1,343.17	\$ 0.00	\$ 1,343.17	\$ 1,343.17	\$ 1,343.17
(\$Cost)	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Labor	\$ 250.00	\$ 0.00	\$ 250.00	\$ 250.00	\$ 250.00
Subcontractor	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Items	\$ 43.41	\$ 0.00	\$ 43.41	\$ 43.41	\$ 43.41
Total Cost	\$ 293.41	\$ 0.00	\$ 293.41	\$ 293.41	\$ 293.41
Gross Profit	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
LP	75.50	0.00	75.50	75.50	75.50
Labor Cost Overhead	3.00	0.00	3.00	3.00	3.00

The flowchart shows the following document types and their relationships:

- Purchase Requisition leads to Return Authorisation.
- Return Authorisation leads to Service Instruction/Job Card.
- Service Instruction/Job Card leads to Service Quotation.
- Service Quotation leads to Invoice.
- Service Quotation also leads to Service Label.
- Invoice leads to Service Label.

- Maintain and track work-in-progress (includes many recognition options for accurate timing of revenue and cost recognition). Identify percentage complete, and determine outstanding revenue/costs.
- Service Manager has a facility for you to create your own custom fields. These fields can be text, numerical, yes/no, or can even be based on fields from the validated ACCPAC optional tables.
- Up to 10 segments in your G/L Account Structure can be overridden at Phase, Employee and Job Type levels. This provides the facilities for Branch and Divisional accounting as well as other types of segment-based reporting.
- Service Centers allow you to view information on jobs, employees, and customers specific to a particular branch.
- Service Manager fully integrates to ACCPAC General Ledger, Accounts Receivable, Accounts Payable, Inventory Control, Purchase Orders, Serialized Inventory, eTransact (web store), ACCPAC CRM, and includes internet and mobile solutions.



Employees

As one of the most important resources of your business, it is vital that your employees are effectively utilized, tracked and managed.

- Service Manager not only records static information such as name and contact details but also information such as skill-sets, custom fields, commission rates, workgroup allocations, and G/L segment overrides where applicable.
- Track resource utilization, profitability, non-billable time, and unallocated time.
- A visual labor and job planner allows you to view workloads, plan ahead, allocate resources, manage conflicts, check maintenance resource requirements, and reschedule employees / jobs. Drag and drop tools allow for easy on-screen editing.
- Management tools allow you to find employees for a specified time, with a desired skill-set and in a particular area to locate and book the appropriate person for the job.
- Employee history is maintained for statistical analysis of profitability, productivity and performance.

The screenshot shows the VAM Job Manager interface. At the top, there's a menu bar and a toolbar. Below that, a date selector shows '13/05/2010' and a time grid. The main area is divided into two sections. The top section is a table with columns: Document Num., Site Name, Status, Priority, Reference, Description Code, Date Entered, and Time Entered. The bottom section is a Gantt chart showing job durations for various employees.

Document Num.	Site Name	Status	Priority	Reference	Description Code	Date Entered	Time Entered
JOB00006	Bargain Mat	Active	1			30/07/2001	15.39
JOB00014	Bargain Mat	Active	1		CP	12/05/2010	13.21
JOB00017	Bargain Mat	Active	1		CP	3/06/2010	13.21
JOB00019	Bargain Mat	Active	1		CP	5/04/2011	13.21
JOB00023	Bargain Mat	Active	1		CP	7/12/2010	13.21
JOB00020	Bargain Mat	Active	2		CP	5/10/2010	13.21
JOB00015	Bargain Mat	Active	3		CP	3/05/2011	13.21
JOB00013	Bargain Mat	Active	4		CP	1/06/2010	13.21
JOB00015	Bargain Mat	Active	4		CP	2/11/2010	13.21
JOB00001	Bargain Mat	Active	5			22/05/2010	14.47
JOB00002	Acme Plumbing	Active	5			22/05/2010	15.10

- A number of different mechanisms are provided for the processing of time against employees:
 - A Time Recorder can be used in-house or in the field to record actual times, these can be compared to estimates and variance reports can be printed for review. Alternatively, simply enter labor charges direct to the job.
 - A spreadsheet style time entry grid allows each employee to process their own time sheets. Time Entries can be verified by a manager and approved before being retrieved into a job for billing. This process can also be performed in batch across multiple employees and jobs.
 - Import facilities are available to allow you to import time entries from other time-capturing systems.

The screenshot shows the Time Entry software interface. It features a spreadsheet-style grid for entering time entries. Below the grid is a 'Summary Totals' section with a date range of 3/06/2001 - 14/05/2010. The summary table shows hours, costs, and billing for various categories.

Mon	Tue	Wed	Thu	Fri	Sat	Sun
13.01	2.00	4.00	10.21	3.39	4.00	0.00
Hours						
Cost						
Billing						
Billable						
Cost Only						
Non Job Related						
Totals						



Equipment

Equipment are assets that your company services and maintains. These can be your own internal equipment or customer owned equipment.

- Equipment is created from a Model. Models define default Equipment settings:
 - Warranty start and end dates
 - Response priority
 - Maintenance requirements
 - Unlimited default Custom Fields
 - Components *
 - Accessories

* Components are defined as pieces of equipment and can have their own serial numbers, warranty, and response priorities.
- Each piece of equipment is recorded as a unique item with its own serial number. Indexed search tools allow you to quickly create new jobs or find existing equipment by serial number.
- All service dates, including installed, last serviced, next service, logged, and fault registrations are stored with each equipment.
- A comprehensive history is maintained for all equipment. This contains all faults, items supplied, labor charges, agreement cover details, notations, warranty claims / return authorizations, all in a complete chronological audit trail of activity.
- Ascertain life-cycle financial profitability for equipment with full statistical analysis.

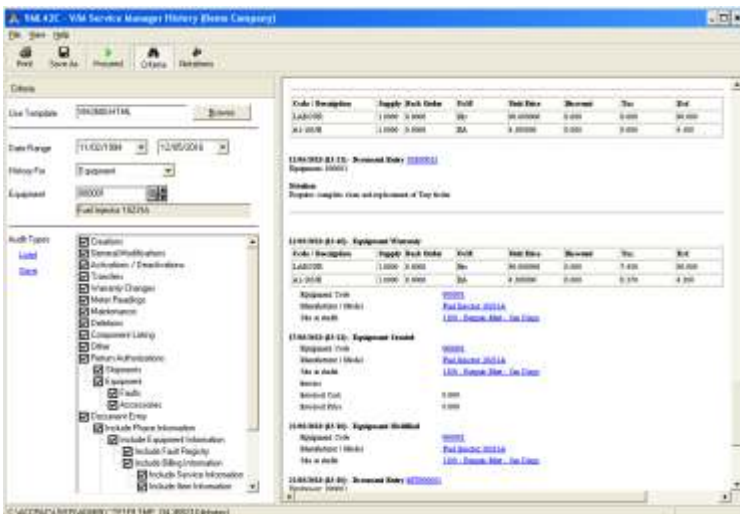
- Each Equipment can have its own status.
- Equipment may be transferred to another customer or location. Equipment history details are maintained during transfer.
- Maintenance schedules can be created to manage the service cycles of equipment. Equipment can be assigned to multiple maintenance schedules. Templates can be defined for easy creation of maintenance jobs and recurring billing.
- Maintenance schedule timing can be based on many criteria. These include dates, meter readings, or specific conditions such as time since last service or every "n" months....
- Meters can be attached to equipment.
 - Meter readings can be based on usage such as distance traveled, hours worked, tons moved, copies made, etc....
 - Each meter will track the last and current readings together with the usage. These can be used for contract billing and planned maintenance.
 - Meter History is maintained at all times.
 - Meter processing tools are available for bulk-processing of meter readings.
 - Online meter readings allow your employees and customers to update readings over the internet.

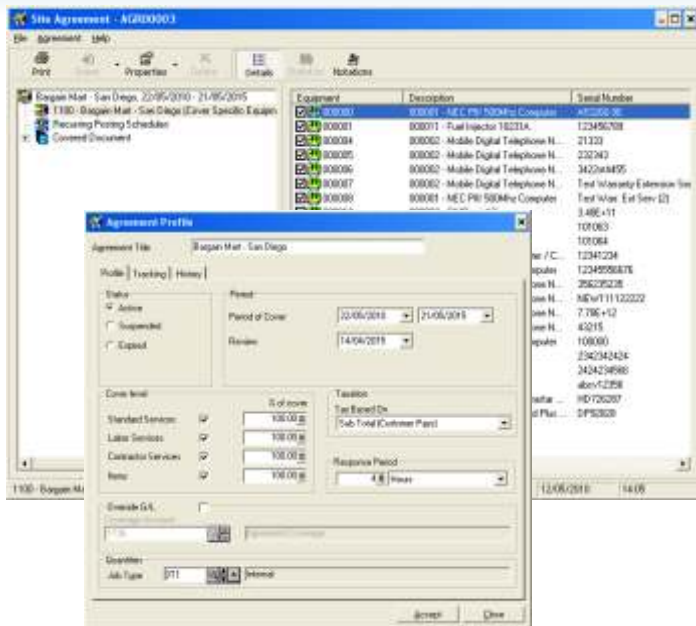


Agreements

Service Manager caters for various service agreement types including site service level agreements, meter and warranty agreements.

- A customer can have many agreements. An agreement can cover many sites, each site can have multiple equipment, and an agreement can cover the entire site or specific equipment.
- Agreements take full advantage of the functionality offered by the job system and equipment can be billed separately on an agreement to track life-cycle profitability.
- You can specify whether to cover standard, labor, contract services or parts from inventory. Define the level of cover on a scale of 0% to 100% so that when a service or item is added to a job it is automatically charged, or covered under the agreement contract. You can set the contract to no cover for situations such as abuse at any time.





- Meter agreements can be setup to cover equipment and to bill contracts based on usage. These can be applied to motor vehicles, office equipment, heavy machinery, pumps, aircraft, electricity meters, water meters and other types of equipment. Special formulae can be created for billing purposes.
- Warranty Agreements can be created to allow you to recoup fees for all work performed under warranty where you act as agent for a vendor or manufacturer's equipment. Billing can be accumulated to the end of the month so that one claim for all work performed during that month can be submitted. Claim information can be transferred online or exported as required to vendor/manufacturer specification.



Return Authorizations

Return Authorizations (RA) are managed by the system for both returns by customers as well as to suppliers.

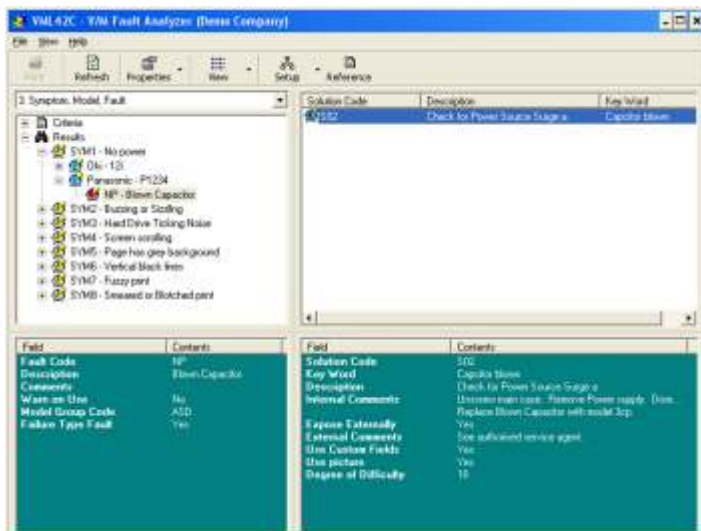
- Define response prioritization to ensure rapid and timely response for customers that require critical support.
- You can track the agreement status as being active, suspended or expired as well as specifying the commencement date, the period of cover, and a review date.
- View and analyze agreement revenue, costs and profitability at any time. A warning facility exists to notify you when costs exceed a defined percentage of the revenue billed to date on the agreement.
- The notations and user defined custom field functions are featured in agreements.
- User-definable usage agreements are also available. Examples of these types of contracts include tracking a specified block of labor time, or the number of incidents allowed.
- Fully automated recurring billing functions include user-definable frequencies. Agreement billing can be automatically escalated on renewal.
- Automatic standing journals can be created to amortize agreement revenue to the G/L.
- RAs can be created for existing serialized equipment, miscellaneous equipment or inventory items. New equipment can be quickly created on the fly during the receipting process.
- Each RA can have multiple equipment.
- Equipment information on an RA includes warranty details, notations, accessories returned, fault registrations, shipment tracking and history.
- Equipment on an RA can be received or dispatched back on multiple shipment documents and the tracking process allows for expected, received and returned steps for both the customer and vendor side of the transaction.
- Email or fax RA documents to customers or suppliers or log and check an RA online via the internet.
- RA statuses are automatically updated by the system during the RA cycle. There is a master RA status as well as individual equipment line status.
- RAs can be processed either on a job or stand-alone without using the job system, which allows for demarcation of responsibilities.
- Items can be returned to inventory, and loans or exchange/rotation equipment can be tracked.



Faults

Accumulating information about faults and providing easy access to that information allows you to simply, quickly and profitably deal with service requests.

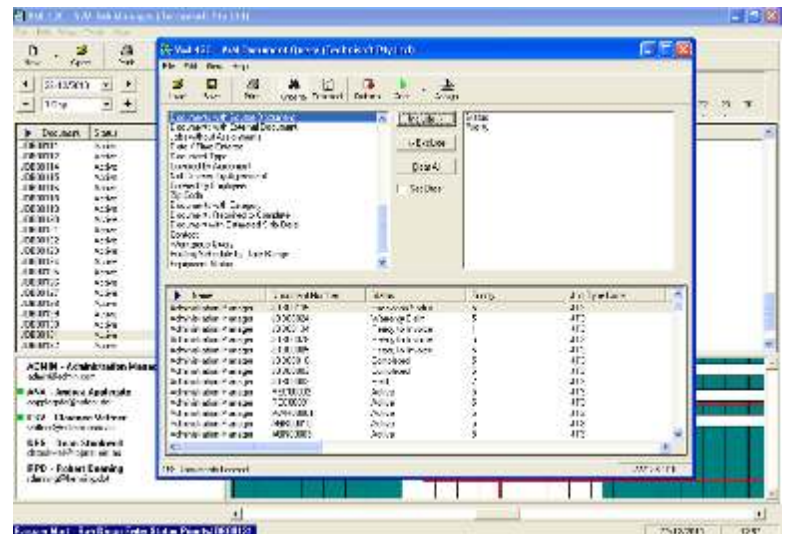
- Service Manager's Fault Analyzer allows you to diagnose and resolve problems, and record information in a knowledge base for future reference. The analyzer consists of three components: symptoms, faults and solutions. Create new symptoms, faults or solutions as required or import them from a manufacturer database.
- Each fault is linked to a model, and the search engine provides a powerful mechanism to locate relevant information from data accumulated from job activity or manual input.
- Take a support call. Type in a symptom and locate the possible cause of the problem and how to resolve it. Alternatively an engineer/technician maybe working on equipment either in-house or in the field and refer to the Fault Analyzer for the relevant solution.
- Solutions can be linked to reference information such as web sites, documents or manuals.
- Preassign templates to solutions to automatically load relevant labor services or parts required to fix the problem when that solution is selected.
- For each solution, specify degrees of difficulty, custom fields, and employee skill sets required to implement that solution.



Query Tools

Empower your organization with tools to easily search for and report on history and activity for customers and their equipment.

- Review and modify historic jobs. Use the Query program to find the jobs scheduled for today, those for a particular employee, by status, by job type, unassigned jobs, late jobs and much more.... Save and reuse these queries, or return them to the job system or job scheduler to be actioned or followed up.



- Comprehensive financial statistics allow you to analyze trends within your business. Trend analysis in Service Manager can highlight the need to:
 - Re-distribute employee or equipment resources
 - Identify hot spot profit/(loss) areas
 - Determine how successful an advertising campaign has been
 - Focus on particular international markets
 - Focus on certain industries or sectors
 - Focus on certain zones
 - Recognize your top earning 20% of customers....
- Print job cards, equipment labels, picking slips, invoices, credit notes, quotations, and contracts. These forms can be customized to suit stationery requirements and company methodology.
- There are over 100 reports and forms to choose from which are constantly being added to. Industry standard reporting tools such as Crystal Reports may be used to create new reports and edit existing reports and forms.



Online Solutions

Allow your employees to stay in touch and transact live from the field, using mobile devices such as smart telephones, PDA's, or portable notebook computers.



Sample Engineer/Technician handset displaying how easy it is to update a job.

- Some of the online live services available include:
 - Adding services or items to jobs
 - Adding notations to jobs
 - Changing job status
 - Changing job priority or advising response time
 - Invoicing the job
 - Quoting
 - Checking the Fault Analyzer for symptoms, faults or solutions
 - Looking up customer history or credit status
 - Looking up equipment history
 - Checking equipment custom fields
 - Revising equipment serial numbers
 - Checking work schedules and task lists
 - Listing your jobs for today
 - Checking agreement information
 - Taking meter readings and updating equipment records....

- Integration to ACCPAC CRM is seamless. Your support and sales staff can view Service Manager information directly from within the CRM module. Check equipment or site history, update job status or priority, check profitability and more....
- Service Manager's online solutions utilize the latest Microsoft .NET development technology. A TCP/IP connection is required. Services such as GPRS, CDMA, 802.11B, and other mediums are supported. Login over the internet, your intranet, or in the field with your handheld portable devices.
- Operating systems such as Windows XP, Palm OS, Windows CE, Windows PC 2003 and Symbian are supported. Most mainstream devices running these operating systems are compatible. See our Website for a list of supported devices.
- Multiple encryption protocols can be implemented to suite your needs and protect your data.
- Add new online employees as demand requires. Service Manager is fully scalable ensuring your business growth is not compromised.
- Microsoft IIS with .NET Framework required.
- Allow your customers to request service online, check an existing job status, equipment status, agreement history or simply update contact information.

Realtime access 24 hours per day 7 days per week!



Standard Reports

Documents

- Document Listing
- Posting Listing
- Aged Documents
- Outstanding Entries
- Work In Progress Summary
- Time Entry Summary
- Schedule Listing
- Agreement Summary
- Notation List
- Overhead/Burden List
- Project List
- Payment Summary

Equipment

- Model Listing
- Equipment Listing
- Equipment Summary
- Equipment TCO
- Meter Worksheet
- Meter Audit
- Maintenance Results
- Item Relationships

Faults

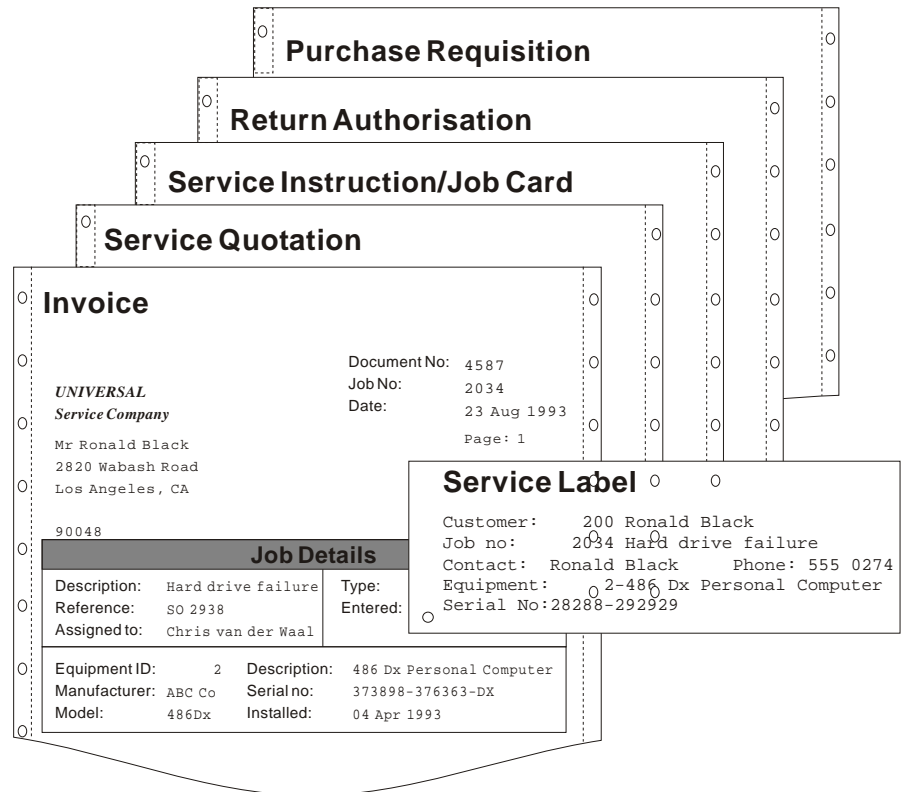
- Symptom Listing
- Fault Listing
- Solution Listing
- Fault Registrations History

Forms

- Customer Confirmation
- Work Order/Job Card
- Equipment Labels
- Return Authorizations
- Invoices
- Consolidated Invoices
- Credit Notes
- Quotation Shipping Label
- Picking Slip
- Agreement Contract

Transactions

- G/L Posting Journals
- Commissions Sales History
- Sales Activity
- Employee Summary
- Warranty Claims
- Amortization Schedule
- Billing Variance
- Response Tracking
- Price Adjustments



Purchase Requisition

Return Authorisation

Service Instruction/Job Card

Service Quotation

Invoice

Document No: 4587
Job No: 2034
Date: 23 Aug 1993
Page: 1

UNIVERSAL
Service Company
Mr Ronald Black
2820 Wabash Road
Los Angeles, CA

90048

Job Details

Description:	Hard drive failure	Type:	
Reference:	SO 2938	Entered:	
Assigned to:	Chris van der Waal		

Service Label

Customer: 200 Ronald Black
Job no: 2034 Hard drive failure
Contact: Ronald Black Phone: 555 0274
Equipment: 02-486 Dx Personal Computer
Serial No: 28288-292929

Equipment ID: 2 Description: 486 Dx Personal Computer
Manufacturer: ABC Co Serial no: 373898-376363-DX
Model: 486Dx Installed: 04 Apr 1993

Interface Services

Windows Gui (Terminal Server, Citrix)

Mobiles Handhelds, PDA, Tablets

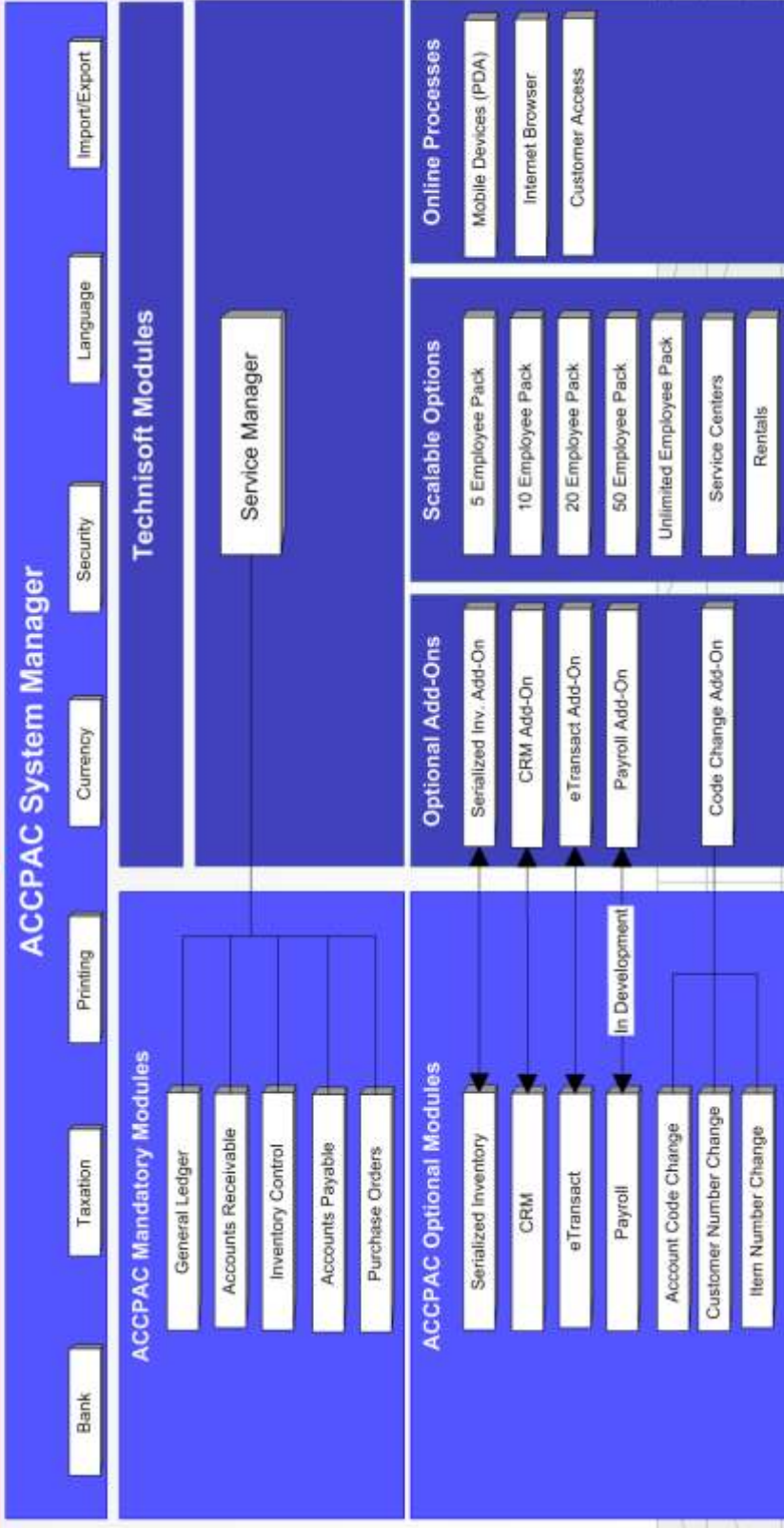
Internet Browser .NET (XML/ASPX)

Custom (VBA, XML, Macros, Import/Export)

Future Interfaces

3rd Party
UniDevCo
Sales Analysis

Common Business Logic Interface (API, XAPI, Com, SOAP)



Database Access Services

Pervasive Driver
Pervasive.SQL

Microsoft Driver
Microsoft SQL

DB2 Driver
IBM DB2

Oracle Driver
Oracle

Other Driver
Other DB



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