

# ServiceXtreme for Sage 500 ERP

## Advanced Edition



**Manages every aspect  
of service operations  
for improved productivity  
and efficiency.**

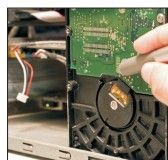
**Service  
Management,  
Incident Tracking  
Invoicing**



**Service Orders,  
Resource Scheduling,  
Expense Tracking  
& Dispatch**



**Asset  
Management  
& Plant  
Maintenance  
Functions**



**Customer History,  
Warranty Tracking  
& Business  
Analytics**



### Speeds Information Flow

ServiceXtreme Service Management software speeds the information flow between business units to accelerate performance and help organizations achieve service excellence.

### Improves Efficiencies

The right service management system improves efficiencies by increasing throughput, decreasing transaction costs, and helping to monitor critical numbers. Service personnel can respond quicker, utilize resources more efficiently, schedule and dispatch technicians best suited for the job and proactively schedule preventive plant maintenance.

### Acts as Delivery Mechanism

ServiceXtreme acts as a delivery mechanism for your products and services to build customer loyalty and sustain a competitive edge. ServiceXtreme will help you deliver quality products and services with a profitable return.

### Provides Information, the Source of Power

In order to respond quickly to customer inquiries, service personnel need access to the right information. ServiceXtreme's transparent information infrastructure provides access to all pertinent information leading to better decision-making.

### Creates Corporate Value and Stakeholder Wealth

With ServiceXtreme as a product and service delivery mechanism, you'll see a timely improvement in productivity and efficiencies, creating impressive bottom-line results and return on your investment. Perhaps more importantly, you'll increase customer satisfaction by improving the entire service experience.



**Increased employee  
productivity  
& improved resource  
efficiencies create  
a timely return on  
your investment.**

### Key Benefits:

*Reduce cost of  
service & warranty  
repairs*

*Respond faster to  
customer inquiries*

*Better manage  
resources*

*Increase service  
revenues*

*Better manage  
inventories*

*Reduce equipment  
downtime*

*Increase  
productivity  
& employee morale*

*Match skill  
sets/certifications  
with service orders*

# ServiceXtreme for Sage 500 ERP

## Advanced Edition

### Service Management

ServiceXtreme Advanced Edition's offers a full range of Express and Advanced functions, enabling the execution of a service order in the format that best applies to the particular need. The Express features allow the service order to be processed using the core functions in an easy-to-implement format. When more detailed transactions need to be managed, the Advanced Edition offers additional incident tracking and analysis capabilities. The result is optimal flexibility.

**Service Management & SROs** - Service Request Orders are the primary "documents" used for service task management, cost tracking and billing operations. They can be used to handle functions such as...

**Break/Fix Service Calls** - for tracking service history performed on any specific product/component.

**Warranty Claims** - for processing claims submitted by dealers/consumers for reimbursement.

**Expense Tracking & Invoicing** - for recording all material and labor incurred during a service call and create/integrate invoices into the standard Sage 500 A/R module.

Besides the essential Service Management SRO capabilities

listed above, the Advanced Edition of ServiceXtreme offers additional valuable incident tracking and analysis capabilities:

**Incident Tracking** - for maintaining detailed data on the status of a project, its expected completion date and costs associated with that function.

**Information Access** - for resolving inquiries, detailed information is available at the Incident level, including service history, the contract or warranty status and event tracking. The Customer Service Personnel also have access to a knowledge base of common resolutions and activity assistance steps so many issues can be resolved immediately over the phone.

**Advanced Tracking** - for more detailed service and incident tracking, the Advanced Edition includes capabilities such as tracking the return of defective products from customers and tracking the costs associated with Reworks. In addition, multiple products and multiple operations can be managed under one SRO in the Advanced Edition.

### Resource Scheduling & Dispatch

Resource Scheduling helps you match technician skills with job requirements as well as provide total visibility of available partners and material for better utilization and allocation of resources.

**Flexibility Partner Definition** - define as

subcontractors, employees, customers, resource or any combination.

**Drag/Drop Scheduling** -

see the available partner and material capacity with the ability to quickly change times or resources for a task.

**Skills/Certification &**

**Location Matching** - assign partners to incidents or service orders based on certification, skill level or location required to service an item.

**Item Schedule** - quickly identify & schedule service

**Before a service technician is dispatched, the call center can verify unit description, check warranty status and determine resources which may be required.**

parts received against pending service orders.

**Automatic Service Order Generation** - setup and schedule recurring maintenance or service calls automatically.

**Partner Queue Scheduling** - re-sequence and maintain appointments based on priority status.

**Preferred Partner Dispatching** - auto-assign "Preferred Partner" for specific customer or unit.

**Work Order Updates** - update work order, labor and materials status directly from the dispatch board. Resource scheduling provides total visibility of partner and material capacity for better utilization and allocation of resources. This helps to reduce transaction costs associated with service and repair requests.



### QUICK START

#### Training Included

To ensure a quick-start, we provide a fundamentals course (for one person) at our training center.



## Service Contracts

ServiceXtreme for Sage 500 provides flexible contract administration allowing you to tailor your contract options to meet a variety of customer needs.

**Contract Rates** – contract rates can be fixed rate, discounted, calculated, standard rates, or time & material.

**Billing Options** – contract administrators specify a monthly, bimonthly, quarterly, semi-annual or annual billing plan.

**Automatic Renewals** – warranty and service contract updates occur automatically, providing sales representatives with up-sell opportunities to increase service revenues.

**Discrete Contract Pricing** – billing and entitlement information can be stored for use in determining pricing for materials, labor and miscellaneous expenses used to service a product.

**Long-Term Rental** - contracts can be configured to provide monthly, quarterly or annual rental agreements

The Service Contracts module allows you to offer flexible contract and billing options to your customers and provides contract up-selling opportunities to increase service revenues.

## Expense Reconciliation & Reimbursement

Partners can enter time spent on an SRO and related expense data via the Unified Time Entry screen. This allows for:

**Reduced Administration** - properly tracking, reconciling and reimbursing expenses can happen as they occur.

**Convenient access** - An optional web enabled version is also available for time and expense entry.



**With historical information readily accessible, tracking warranty status & maintaining service contracts becomes a stream-lined process.**

## Warranty Tracking

ServiceXtreme for Sage 500 gives users complete visibility into warranty information of a product including all individual sub-components. A complete history of all add-on and replacement parts made over time is tracked and can be viewed from a single screen.

**Complete Component History** – view product configuration for any date, including as-built, as-sold, and as-is configurations.

**Service History** – record all changes and repairs made to a product along with the reasons and technician that made the change.

**System Warranties** – assign warranties to the product or complete system.

**Warranty Origination** – manage the partner providing warranty service (vendor, manufacturer or dealer).

**Consumer Registration History** – record each time a new user registers a product.

**Unit Status History** – track status of an unit, whether it's active, loaned, rented or in production, etc.

A system for managing warranty coverage enables you to monitor warranty commitments, maximize service revenues and increase profitability.

## Optional Modules

### ServiceXtreme Mobile

allows users with handheld devices or laptops to log SRO transactions, check incident status, and view unit configurations. Also allows users to capture signatures of customers to verify receipt of services.

**ServiceXtreme Web** - remote users, including employees, customers and subcontractors, with internet access can enter SRO transactions, and register units for warranty coverage.

### Microsoft MapPoint

**Integration** - allows users of Microsoft MapPoint to enter an address and receive route optimization and direction



**ServiceXtreme Mobile enables technicians to access needed information while in the field, eliminating wasted trips.**





## Seamless Integration with Sage 500 Business System

ServiceXtreme seamlessly integrates with Sage 500 speeding data flow between your enterprise and service management application. By integrating with Sage 500,

ServiceXtreme accesses and updates information contained in the customer, products and financial files of Sage 500 ERP, eliminating data redundancy and the possibility for data errors.



**Redundancy between systems is eliminated, increasing accuracy and information flow.**

## Integration Benefits

### Seamless, Real-time Integration

- ends maintenance of messy interfaces.

### Consistent User Interface and Operational Navigation

- speeds user acceptance and minimizes training required.

### Utilizes Your Existing MS-SQL Server

- prevents additional services from being required.

**Leverages Built-In Sage Functionality** - works with System Alerts, document attachments, and multi-currency features.

[www.singlesrc.com](http://www.singlesrc.com)

## Service Management Expertise

ServiceXtreme for Sage 500 ERP, flagship value-added extension, has been available to the manufacturing, distribution, and service markets since 1996. ServiceXtreme seamlessly integrates with Sage 500 ERP, managing every aspect of a company's service operations. Core functionality of ServiceXtreme also meets internal Plant Maintenance (PM) requirements for fleet and facility maintenance.



**An integrated system enables information to flow through every aspect of service operations, from inventory to invoice, no matter how complex the product or customer requirements.**

The right service management system will help your service personnel respond quicker, make better decisions, utilize resources more effectively, and build knowledge to speed future decision-making. ServiceXtreme acts as a delivery mechanism for your products and services to help improve efficiencies and ultimately increase corporate value and shareholder wealth. ServiceXtreme can be successfully implemented in many manufacturing, distribution and service markets.

## Markets Well-Suited for ServiceXtreme for Sage 500 ERP

### Capital Equipment (Manufacturing, Distribution and PM)

Construction Equipment  
Heating, Refrigeration, Ventilation  
Manufacturing Machinery  
Printing Machinery  
Specialty Vehicle (Ambulance, Fire Truck, Motorhome, Yacht)

Elevators, Generators  
Industrial Compressors, Pumps  
Motorized  
Devices & Engine  
Textile Machinery

### Technical Equipment (Manufacturing, Distribution and PM)

Computer Equipment  
Fire & Security Equipment  
Network Peripheral Equipment

Electronics  
Medical, Dental, Laboratory Devices  
Tele-Communications Equipment

### Dealers

Construction Equipment  
HVAC  
Mechanical Contractors  
RV & Camper

Fire & Security  
Marine & Boats  
Office Equipment  
Tractors, Trailers, Trucks

### Professional Services

Accounting & Auditing  
Computer Systems Integration  
Government Municipalities  
Technical Equipment Maintenance & Repair

Aerospace Maintenance & Repair  
Engineering & Design  
Software Development  
Transportation Maintenance & Repair

Charter Member-MAS 500 Premier Developer Program

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