

Service Management

Who: Service Management clients who handle routine processing tasks. Clients can attend both days, or just Workflow, or just Setup.

Content: Two days of hands-on experience with the Service Management Day 1: Covers workflow from the time a call comes to the dispatcher, to completion and billing of the service call. Day 2: Discussion topics range from modifying setting to accommodate your needs, to tracking your preventative maintenance.

Credit: CPAs successfully completing the course will receive a CPE certificate. CIS Consulting Group is a CPE sponsor with the North Carolina State Board of CPA Examiners, PO Box 12827, Raleigh NC 27605

Prerequisites: A familiarity with Microsoft® Windows®. We encourage clients to familiarize themselves with the software prior to attending.

Class Rates:

One Day: \$450 1st participant, \$400 each additional
Two Day: \$800 1st participant, \$700 each additional

Registration:

Please fax completed registration form to 704-394-0052 or register online at www.cisinfo.com/classroom.htm for more information please call 704-393-0038 x1142

Course Outline

DAY ONE: WORKFLOW

Using the Dispatch Board

- Create a New DBoard
- DBoard Functions
- Assignment colors & Priorities

Work Order

- Enter a New Work Order
- Enter Work Order Items
- Invoice a Work Order
- Process a Small Job

Payroll

- Time Entries

Daily Processing

- Run Daily Processing While Logging In
- Run Daily Processing from Tasks Menu

Service Agreements

- Creation of Agreements
- Time of Service Billing

Purchasing

- Enter a Purchase Order
- Receive Items on a Purchase Order

Inventory

- Restocking Lists
- Transfer Parts

DAY TWO: SETUP

SM Settings

Accounting

- Products, Centers and Departments

Technicians and Locations

- Technicians, Groups, Pay IDs, and Skills
- Service Areas and Postal Areas
- Service Locations and Customer Locations

Equipment

- Equipment Classes
- Types and Manufacturers

Inventory

- Vendors, Parts, Markup and Discount Tables
- Units of Measure
- Stocking Locations, Standard Stock Lists

Service and Fleet Maintenance

- Rate Sheets, Call Types, Problems and Repairs
- Flat Rates and Miscellaneous Items
- Standard Items
- Vehicles and Manufacturers

Sales Leads and Purchasing

- Sales Lead Type, Job Types
- Payment Terms, Billing Accounts
- Shipping Methods

Agreement Types and Preventive Maintenance

- Agreement Types
- Agreement Prerequisites
- Preventive Maintenance