



Web-based Software Solutions

Cloud or Server-based platforms

Service Module



This module is designed for businesses that provide Repair Services as well as recurring billings for rentals, subscriptions and services.

It will streamline your service department, managing service calls and scheduling technician work. You can also integrate with mobile handheld devices for a fully paperless environment.

The billing cycle is completely automated (mailed or emailed invoices, PAC payments and batch credit card processing), according to a your predetermined billing cycles and integrates with the complete RSA Financial System.

- **Customer billing by any method**
 - Automatic Dealer billing – unlimited sub accounts to master account
 - Unlimited recurring charges per client with different billing cycles
 - Flat Rate
 - Time & Materials
- **Inventory**
 - By service vehicle
 - Serialized number tracing
 - Automatic low-inventory alert reordering
 - Drop shipments direct to job location
- **Payroll**
 - CCQ ready
 - Direct deposits
 - Multiple union rate categories
- **Service calls**
 - Technician monitoring
 - Google Map integration
 - Canada 411 reverse look up integration
 - Scheduling
 - Text messaging thru system



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Service Calls - Maintenance - Search...

Customer **ABC-1000** Telephone **411**

STATUS **CREATE...**

Contact(s)	HARVEY BRANDFORD	English	SERVICE CALL		Schedule
Name	WESTFAIR STORE# 1029102				Problem
Address#1	A1				Comments
Address#2	A2				
Address#3	A3				
City	State/Province	Zip/Postal	Reference		
CITY	ON ~ ONTARIO	H3R-5Y6	Call YYYY-MM-DD		
Telephone#1	Telephone#2	Telephone#3	2012 03 19	Time	Priority
TEL1	TEL2	TEL3			1
			Service Date YYYY-MM-DD	Time	Duration
					1
			Technician	Warranty	
			None	None	

Product No.	Description	Quantity	Selling Price
CALL	SERVICE CALL	1.00	150.00
TRAVEL	TRAVEL TIME	1.00	0.30

Create a Call

- Preload work order with applicable charges so nothing is forgotten.
- Reverse Canada 411 lookup by telephone number.
- Add new customers on the fly.
- Lookup customers by customer number, name, billing address, job address and telephone number(s)
- Require Purchase Order for service calls by customer account type.
- Integration with Google maps© to view job site address.
- Send and receive SMS (text messages) directly within system.
- Immediately assign call to technician or process via the scheduler.



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Customer Telephone 411 reverse lookup based on phone #

ACME ABC CORP. STORE# 1029102 | A1 | A2 | A3 | CITY | H3R-5Y6 | CA | TEL1 | TEL2 | TEL3

Order	Product Type	Transaction Date	Service Date	Technician	Contact	Job Site	
1044	SVCCALL	2012-03-19	2012-03-19	DENIS	Harvey Brandford		SHIP TO #2
1041	SVCCALL	2012-02-27	2010-08-05	DENIS		X1029102	ADD1
1015	SVCCALL	2012-02-27	2012-02-27	DENIS	Harvey Brandford	TEST2	CITY, QC POSTAL
1026	SVCCALL	2012-02-27	2012-03-14	DENIS=DENI	Harvey Brandford		CA
1034	SVCCALL	2012-02-27	0000-00-00		HARVEY BRANDFORD		no power to machine
1043	SVCCALL	2012-03-19	2012-03-19	DENIS	Harvey Brandford		

last of calls

Serial Number	Sub-Model	Year	Warranty	Extended	Contract	Service
190293		2010	PARADOX / PAR-1728 / SPECTRA 1728			last reviewed 2012-02-15

customer's equipment

Customer Status all in one location

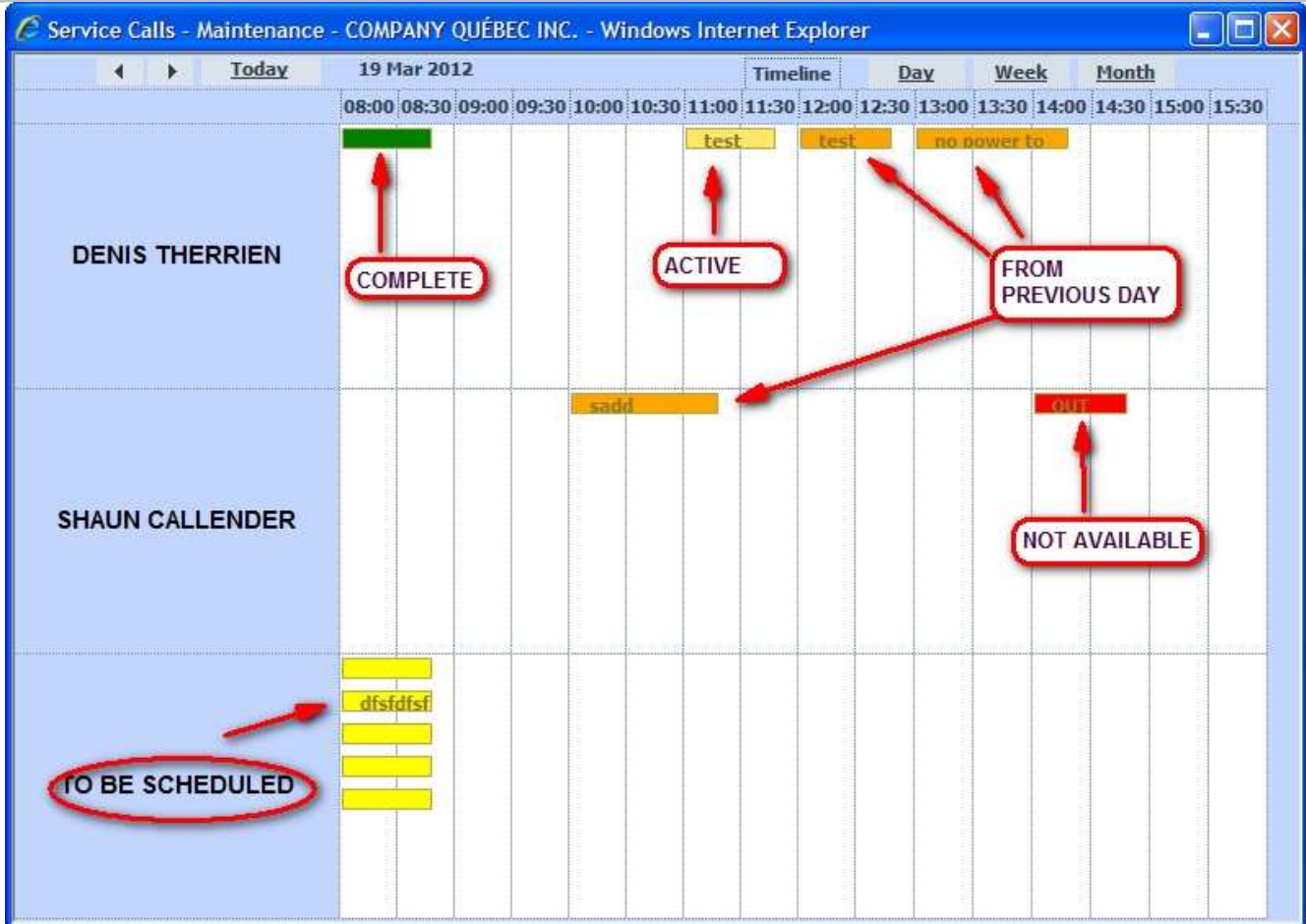
- View all previous customer service calls.
- View all service calls by individual job location.
- View all customer equipment and their repair history.
- Drill down to view and print all service calls and invoices.



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Scheduling

- Allows you to view all unassigned jobs and by using your mouse assign to a tech.
- View all techs, their availability and current status.
- Integration with Google maps© to view address location.
- View all completed, active and unassigned jobs.
- Use your mouse to drag and drop jobs.
- If you computer has two monitors, leave this screen constantly open and it will refresh automatically as job status is updated.



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WORK ORDER

RSA SOLUTIONS (CANADA) INC
2808 JOLICOEUR
MONTREAL, QC CA
H3E 1Y9
(514) 344-2300 (514) 344-4494

Date: 2012-03-20
No: 1096
TPS/GST 7827827827
TVQ/GST 8738783782

Bill To: BOB SMITH
87 MAIN STREET
MONTREAL, QC CA
K9K2S9
514-344-2300

Job Location: BOB SMITH
87 MAIN STREET
MONTREAL, QC CA
K9K2S9
514-344-2300

Quantity	Description	Price	Total
1.00	SERVICE CALL	65.00	65.00
50	TRAVEL (K/M)	0.45	22.50
1	SHOP SUPPLIES	5.00	5.00

INVENTORY FOR WORKORD

Labor
Material
Travel
Sub-Total
GST
CST
Total

Work Order

- Create and print work orders directly from service call input.
- Integrate with mobile handheld device to complete a fully paperless environment.
- Allow multiple techs per job.
- Analyze billable hours per tech.
- Keep track of inventory by service truck.
- Once work is completed, work order is transferred to a sales order, where parts and hours can be added and then an invoice automatically created.
- Create in-house work-orders for internal repair work (non-billed but tracked).
- Create warranty work-orders for jobs to be billed to third-party.
- Analyze estimated versus actual billed hours.



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Service Billing

- Create user-defined billing cycles (Weekly, Semi-monthly, Monthly, Quarterly, Semi-annually, Annually, etc) that allows you to decide how many times per year a customer gets billed. Current order and Invoice automatically gets updated with new term of service dates.
- Create estimates with material, labor and profit calculations. With optional Job/project module you can track a breakdown of estimated costs versus actual costs; the job costing report gives you detailed rundown on materials, labor, outside services, and miscellaneous costs as they relate to each job. Easily review which jobs and estimators are making you money.
- Create billings for service resellers, displaying service address location and calculating pricing and discounts by customer, product group or individual product.
- Load user selected billing cycle into the billing batch. Changes made will be added to current invoice as well as future orders.
- Multiple pricing updates can be done based on type of service, current cost and new fee schedule.
- Invoices emailed or printed, as determined by customer preference and language.
- Print invoice batch report for approval prior to creating invoices and create invoices in advance with user determined billing date.
- Allows for multiple ways to handle job billing, whether you do partial billing, billing upon completion, collect a percentage or dollar amount up front. Creates a separate invoice (related back to the original order) for each billing phase.
- All your important documents such as contracts can be scanned and attached to your customer's Account. No longer have to spend half-a-day looking for that piece of paper to know how much to bill.
- Gives you the flexibility to handle diverse billing combinations and calculates invoices accurately according to your business rules (multiple currencies, taxes and terms).
- Batch import of cash receipts for customers that pay with direct deposit.
- Batch credit card processing using Moneris® credit card processing.
- Add NSF charge to accounts when posting returned payments.
- Route management for scheduled maintenance, with routing priority.
- Save time and minimize data entry, thanks to complete integration with the Accounts Receivable and General ledger, which is updated automatically with each billing cycle.