

SME Service Management Enterprise Quick Start Guide

Are you ready to Run a Better Service Business?

1.

Customer Management

Customer relationship management including customer history, customer equipment, project management, maintenance contracts, and job costing.



2.

Work Order Tracking

Generate work orders, assign material and dispatch technicians or subcontractors. Setup recurring service orders to automate processes.



3.

Invoicing & Billing

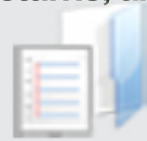
Partial, progress and combined invoicing, recurring invoices, subcontractor and vendor billing, forecast expected revenue and track payments.



7.

Inventory Management

Manages individual inventory items, packages, and services in multiple warehouses. Tracks serialized material, purchase orders linked to work orders, warehouses, transfers, barcoding, returns, and vendor management.



6.

Sales and Proposal Management

Comprehensive tracking of sales prospects and generate proposals that convert to orders.



5.

Field Technician Dispatch

Run your technicians with ease from the back office using complete tracking of human and asset resources within your job calendar. Schedule and create bills for subcontractors.



4.

Integration with QuickBooks

Keep everything between SME & QuickBooks synced: Customers, Vendors, Item Lists, Tax Codes, Employees, Bills, Inventory, Invoices & Payments.



intuit
Intuit Partner Platform

8.

Mobile Tech for SME

User friendly web-based application that provides your field technicians with the ability to access and update work orders. Tracks time in and time out at jobsite with GPS timestamp.



9.

Time Tracker for SME

Allow technicians to record their time in the field with an internet connected device. Supervisors track their technicians timesheet entries, verify accuracy. Tracks time in and out with GPS timestamp.



10.

Warehouse Manager for SME

Allow warehouse personnel to receive, pick parts, or transfer parts between locations using any standard USB or Bluetooth barcode device.



High5
software
Run a Better Service Business™

Call us at (800) 585-1696