

EZeService™

Software made EZe

Powerful Service Billing and Job Costing software that assists you in achieving maximum efficiencies in your business. EZeService is designed for any business involved in service billing. You can choose either the *Standard* or *Professional* versions to suit your specific needs.



The emphasis in the design of EZeService has been ease of use. It is due to this and its intuitive nature that many customers have purchased the product without any training. It comes complete with user manual, on-line help, how do I and KnowledgeBase.

Takes you from Quote to Job Card through to completed Invoice

You can either start from a quote or direct from a job card. From one convenient job view you can select parts (both stock and non-stock and catalogue items) and labour, set scheduling and much more. When ready, simply click on the update button and produce your invoice.

Create Templates for Quotes & Jobs

You can quickly create a quote or a job from stored templates then simply change as required.

Manage your Quotes!

When you convert a quote to a job the system automatically flags the quote as successful. Has ability to set a number of different quote flags so you can report or track on lost and won business.

Visual Job Grid

The job grid is the power-centre of the system. It is a powerful tool providing an instant snap-shot of the status of the jobs in your system. Quickly identify jobs that are: booked in, in progress, awaiting parts, awaiting outside repairer, completed, flagged for invoicing, completed but not invoiced and more. You can tailor the job grid to suit like, re-sort data by clicking on the column heading, rearrange column positions, allows for colour coding to highlight specific incidents, eg set colour for unpaid invoices, filter settings, overdue

or not yet renewed and service agreements. Users filter and view preferences are remembered. The Jobs and Quotes grids are easily identified by different colours.

Visual Job Scheduling

Allocate technicians or service vehicles to jobs based on day and time. Technicians can then easily view bookings.

Service History

At the click of a button know instantly the complete history and profitability of work done on that equipment.

Powerful controls through Job Status and Priorities

Use the EZeService job status and priority levels to quickly manage and control your jobs.

**As one customer said
"....let me put it this way,
without EZeService I
wouldn't be in business!"**

Your Invoice – Tells the story!

You can describe in as many pages as required the work being done. The description prints across the full page. Invoice layouts may be modified to suit your particular requirements. Recall commonly used notes – speeds keying.

User-definable and flexible document control will allow you to individually flag a job to show / not show parts, labour, technician or materials. Preference settings will be remembered for that job.

Progressive Invoicing

Invoice when you like. You do not need to invoice at the end of the job. You can invoice progressively for any size jobs.

Manage Technicians charge-out and cost rates

Ability to set unlimited charge-out and cost rates for each technician.

Warranty processing

Warns when a warranty job is being done on equipment where the warranty has expired.

Powerful built-in assistants

Several wizards are provided to assist with job copying, purchase ordering, linking with hand-held devices and integration to accounting packages.

Security – Your information is safe!

Ability to set security by user to: view costs, change costs, view gross profit and modify system parameter settings.

Gross-Profit Controls

While building a job you can view the Gross Profit to ensure you are achieving maximum profitability (if user has security access). You can produce reports confirming gross profit margins.

External Parts Catalogue & Price Lists

Import catalogues from external suppliers or enter your own categories. Create a non-stock category and track these within EZeService. Can even import your own price list from spreadsheet programs.

Job input Grid

Job No	Serial No	Equip Id	Status	Cust Code	Name	Technician	Sched For Date	Sched For Time	Complete By Date	Comp By Time
AA001	EPS2222	EQID000000002	IP	AGC001	AGC Finance		15/07/2003		1400 25/05/2003	0
AA006	EPS2222	EQID000000002	FI	AGC001	AGC Finance		07/07/2003		0 03/06/2003	0
AA007	IBHAPT22259	EQID000000005	BI	BEC001	Becker & Associates	RW	06/07/2003		0 05/06/2003	0
AA007	PRE858455	EQID000000007	IP	BEC001	Becker & Associates	RW	15/07/2003		0 03/06/2003	0
AA003	SA123456669	EQID000000003	IP	BEC001	Becker & Associates	MRH	25/07/2003		0 03/06/2003	0
AA009	SA123456669	EQID000000003	BI	BEC001	Becker & Associates	MRH	/ /		0 03/06/2003	0
AA010	SA123456669	EQID000000003	BI	BEC001	Becker & Associates	MRH	/ /		0 03/06/2003	0
AA011	SA123456669	EQID000000003	BI	UK001	UK Limited Importers	MRH	/ /		0 03/06/2003	0
AA012	SA123456669	EQID000000003	BI	XYZ001	XYZ Retail Pty Ltd	MRH	/ /		0 03/06/2003	0
AA013	SA123456669	EQID000000003	BI	ABC001	ABC Importers Pty Ltd	MRH	04/07/2003		0 03/06/2003	0

Quote input Grid

Sched For Time	Complete By Date	Comp By Time
0 / /	0	0
0 05/06/2003	0	0
0 05/06/2003	0	0
0 05/06/2003	0	0

Professional!

Terminology Database and User-Defined fields

If our terminology doesn't suit, create your own! EZeService allows you to change the terminology of certain fields for your industry, even to a different language.

Industry Page

Operates in more than 60 different industries. Several Industry Pages are included. When reset will also change some field meanings automatically. If your industry is not there we will include it.

Serial Number tracking

Quickly locate who owns the equipment simply by entering the serial number. You can track the service history for that serial number.

Raise Purchase Orders

Ability to raise purchase orders on the fly. When entering a job you can raise a purchase order on parts, non-stock items and sub-contracted labour. You can order additional, for stock at the same time.

Service Agreements

Specify rolling service agreements associated with equipment for a customer. Specify contract price and length of agreement. Indicate whether this contract should output a renewal notice or straight to invoice. Ensure outstanding invoices are paid, quickly identify unpaid invoices. Provides for automatic renewals saving you administration time.

Multiple Equipment attached to Jobs

Ability to service multiple equipment on the one job and billed together or separately.

Equipment Schedule

Get to your customers before your competition does. Mail-merge to send reminder letters for services falling due.

Receipting

Receipt against one or more jobs. Produces Bank Deposit Listing. Know which jobs are outstanding. Especially important for service contracts!

Bulk Time-sheet Input

Enter time cards daily or weekly against a Visual Time-Sheet. No need to enter labour times against individual jobs. Assists with balancing employee times.

Multi-currency Enabled

Automatically detects an overseas customer and allows you to enter the exchange rate relevant to this job, and bill in that currency. The foreign currency symbol set in parameters is displayed.

Standard vs Professional versions

Please see the accompanying fact sheet on which features are offered by which version.

Mail-Merge Capabilities

Merge with popular word processing packages. Improve your communication with your customers.

Flexible Reporting

There are many reports to choose from. All reports provide for selection criteria and filters which are remembered by user. You can modify your own reports using Crystal Reports, or build your own using other 3rd party reporting tools as we provide an open database. ODBC is included.

Gross-Profit Controls at your fingertips

Produce reports confirming your gross profit margins.

Job Cost/Status Report

From one convenient report you can produce: Work In Progress, Jobs Completed, Jobs Received, Technician productivity report and much more.



* Supports most email, word processing & spreadsheet programs

Powerful Features

Supports multi-location. Supports Kits and Service Packs. Notes can be retained against each job.

Customised Options

If we don't have it we'll write it for you... and ensure your specific changes will continue to be supported in all updates.

Integrated with popular CRM packages

Record further information against popular CRM packages. EZeService records the link to the specific contact record and remembers to update future information including the next job created against this equipment.

Accounting packages

EZeService integrates with most popular accounting packages. Just ask us!

Integrated with Hand-helds

Links with the hand-held devices and associated software programs. Send your technicians out in the field and have job information transmitted back to the office and billed to the customer before the technician returns! Thus streamlining processing of information and increasing your cash-flow.

Internet Enabled

Job Card, Service Reports, Purchase Orders and Invoices may be emailed to pre-specified recipients. Plus ad-hoc emails, eg notifying the customer that the job is complete.

E & O E

The screenshot displays the 'Job Edit' window in the EZeService software. At the top, there are fields for Doc Type (Job), Job Number (AA012), Equip Id (EQID00000003), and Serial No (SA1234556689). Below this, a table lists job items with columns for Type, Line, Date, Store, Part No, Description, Unit, Qty, Tax Type, Excl Price, and Disc %. The table contains several rows of data, including items like FUSES, MODCAB, and Power Supply. At the bottom of the window, there are summary statistics for GP %, Hours Spent, Hours Charged, Avg Hourly Rate, and Perc % Chgd, along with a total amount of 184.73. The interface also shows various action buttons like 'Post to Accounts', 'Cash Sale', and 'Show 6P% for Job'.



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