

SERVICE MANAGER 3.0

by Bluelight Software, LLC

Basic Training Outline

Getting Familiar with the System

Introduction

- Overview
- Login
- Main SM3 Dashboard
- File Menu
- Pull Down Menus
- Icons
- Keyboard Navigation
- Window Menu
- Using Help

Working with Grids

- Grid Tool Bar
- Find
- Sort
- Filter
- Adjusting Row Height
- Adjusting Column Width
- Custom Views
- Saving Custom Views
- Right Click Menus
- Data Display Hints

Maintenance Modules

Item Maintenance

- Item Types (L, M, I, O)
- View an Item
- Edit an Existing Item
- Add an Item/Setup Item Price/Setup Inspection Part
- Delete an Item
- Item Comments
- Item Tables
- Item Reports

Customer Maintenance

- Bill To Customer vs. Site Customer
- View Customer
- Edit an Existing Customer
- Add Bill To Customer
- Add a Site Customer
- Delete Customer
- Customer Comments
- Additional Activity
- Customer Tables
- Customer Reports

Schedule (Inspections) Maintenance

- Add a Schedule/Setup Schedule Price
- Edit a Schedule
- Delete a Schedule
- Change Schedule Item
- Schedule Comments
- Generate Work Orders
- Schedule Tables (SCAT)
- Schedule Reports

Order Maintenance

- View an Order
- Edit an Order
- Add an Order
- Print an Order
- Delete a Work Order
- Order/Invoice Comments
- Invoice an Order
- Un-invoice an Order
- Order Tables
- Order Reports
- Sales Reports
- Work Order Pricing

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Proposal Maintenance

- Add a Proposal
- Convert a Proposal
- Edit a Proposal
- Delete a Proposal
- Proposal Comments
- Proposal Tables
- Proposal Reports

Contract Pricing Maintenance

- Add a Pricing Contract
- Edit a Pricing Contract
- Delete a Pricing Contract
- Contract Pricing Reports

Other

Sample Reports and Forms

- Customers
- Schedule
- A/R
- Orders
- Sales
- Proposals
- Dispatch
- Items
- Inventory
- Price Rules
- End of Period
- Sample Forms

End of Period (EOP)

- Preparing for EOP
- Data Base Backup
- Performing EOP
- Printing EOP Reports
- Data Base Restore

Accounts Receivable

A/R Functionality

- A/R Definitions
- Customer Flags
- Company Table Flags
- Payment Types
- Aging

A/R Menu

- Customer Detail
- Deposits
- Finance Charges
- Adjustments
- Reports
- A/R Scenarios