



PENTA SERVICE AND WORK ORDER MANAGEMENT

Optimize Service Operations with PENTA



*For the first time,
manage your
construction and
service operations
without compromising
on either side or
having to deal with
multiple systems from
different vendors.*

Introducing PENTA Service Management, the new service and workorder management system from Penta Technologies. Intended for busy construction firms with installation, repair and maintenance operations, PENTA Service Management gives you the tools to improve project and cost management, reduce operating costs, and enhance customer service.

Because PENTA Service Management is fully integrated with PENTA's industrial strength construction and financial management application, you can now manage all of your work, from large-scale construction to quick-response service, in one system.

PENTA Service Management integrates all of your key data into a single, powerful database delivering real-time information anywhere it is necessary – on the job site, at the home office, or at the site of your work order.

You'll enhance client relationships, maintain better control of your costs, and be able to better assign resources to meet operational needs today, tomorrow, and into the future.

Key Benefits of Penta Service Management

Fully Integrated with Construction Job Cost Accounting

Truly integrated solution provides a global view of all of your business operations, including:

Customers

- Service work orders
- Construction jobs
- Billings
- Accounts receivable / collections
- Locations

Vendors

- Purchase history
- Purchase orders
- Payables and payments

Employees

- Issue one paycheck for service and construction work in the same pay period
- Issue one W-2 for all work performed during the year

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Monitor and capitalize on opportunities by assigning, tracking and generating work orders based on quotes.

Customer Equipment Information

An inventory of each customer's equipment when taking calls and dispatching technicians improves service response and quality.

Customer Equipment Inventory Includes:

- Description
- Model Number
- Service History
- Warranty Information
- Components / Related Equipment
- Free form notes
- Maintenance Schedules
- Electronic documents
- Manufacturer
- Scheduled Maintenance
- Unlimited number of user-defined fields

Maintenance Contracts

Maintenance contracts completely integrated with and supported by work order setup and dispatching help you manage an important profit center.

An operator or dispatcher can automatically generate work orders based on maintenance contracts due for service / inspection and can choose which units should be serviced on each work order, helping you ensure that maintenance and inspection tasks are performed on a timely basis.

Additionally, maintenance contracts capabilities allow you to:

- Manage maintenance contract profitability by tracking estimated costs, dollars remaining on the contract, and comparisons of actual and estimated cost; including estimates and expenditures for "maintenance reserve" costs.
- Provide flexibility to customers with billing options like issuing contract billings only when service has been performed.
- Inform customers of work performed under maintenance contracts by issuing "\$0.00" invoices.
- Optimize resource utilization by projecting service technician manpower needs based on the life of existing preventative maintenance contracts.
- Differentiate services and maximize revenue by selling and managing various levels of maintenance agreements and service. For example, you can set up levels with names like Gold, Silver, Bronze, each with its own pricing, scope, response times, etc.
- Manage and account for prepaid Service maintenance contracts, including the ability to record payments prior to workorder creation or performance of work



Billing users can preview invoices online and change, add or delete specific charges while maintaining the integrity of the true cost of the work order, thus shortening the billing and collection cycle, and reducing DSO.

- Accelerate cash flow by allowing customers to pre-purchase blocks of hours. This includes the ability to monitor hours purchased, used, and remaining.
- Schedule preventative maintenance and inspection services by calendar period (monthly, quarterly, annually, etc)

Call Taking & Dispatching

Fast, easy setup of new work orders with predefined templates improves response and customer satisfaction and maximizes efficiency and productivity.

Help call takers and dispatchers determine which call is a new work order, or an extension of an open or recently performed work order or construction job via quick access to all work orders and other work, such as construction projects for a specific customer or location. This includes both completed and open work orders and projects.

View documents such as warranties, diagrams, instructions, etc. associated with customer equipment during work order entry and dispatching, providing additional information to ensure the job is done properly.

Instant access to warranty information related to this customer's equipment.

Easy to learn and use graphical schedule board interface simplifies work order assignment allowing "drag and drop" assignment of work orders meaning dispatchers can easily view open and scheduled work orders and technician availability, and assign work orders.

- Users can establish color-coding schemes for work order display based upon priority. This increases visibility to help dispatchers address the most urgent work orders first.
- Find which technicians have the skill set to perform specific types of work to ensure appropriate personnel are assigned to each work order.
- Users can profile what information should show on the dispatch board related to a work order to present the most important information about each work order to the dispatcher.

Single point of entry for work completed including labor, equipment, material used and description of work performed meaning faster, more efficient data entry and billing.

Invoicing and Billing

PENTA Service Management gives you fast, flexible invoicing options. Bill each job with fixed-rate, flat-rate/estimated, on-going contract management or discount/markup pricing. Add miscellaneous charges, establish special relationship discounts, have unlimited rate tables, and even customize call types with their own labor rates. Additionally, you can apply overhead and add miles or trip charges to each call. You can even create automated recurring billings for services like maintenance contracts.



Billing in PENTA Service Management is flexible and efficient. Billing rates and billing format can be based upon information assigned at the customer, customer location and template levels, with overrides available for specific work orders. These standard rates and formats speed work order entry and billing processes, and enforce standardization. Overrides let you quickly adapt to special circumstances.

Direct work order billings to the customer or to third parties, such as manufacturers for warranty work, while maintaining service history for the customer and their equipment.

Make sure work is scheduled, performed and billed properly via flexible, online access to work order cost and revenue information.

Management Reporting

Provide a complete cost picture on construction jobs while allowing costs and revenues to be associated with the department performing the work by associating work orders with construction projects, for example: warranty work on new construction, balancing the new systems that were installed by construction crews, etc.

Exception conditions, including:

- Work orders reported but not assigned
- Work orders assigned with no activity
- Unbilled work orders

Profit and Loss analysis at many levels:

- Business unit
- Customer
- Service type
- Project Manager
- Time period
- Technician
- Any combination of these

If you need a comprehensive, integrated construction and service management system, call 262-782-7700 or email sales@penta.com today and ask about PENTA Service Management.

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