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# New Release: SM-Plus v7.0 for Sage MAS 500 ERP

## New Features and Enhancements Extend Functionality Of SM-Plus Advanced and Express Editions.

Service Management-Plus (SM-Plus) is the software solution that allows service-centric organizations to efficiently manage their entire service operation, including the call center, field service, warranty and extended service contracts, parts inventory, resource management, schedule/dispatch and performance analytics. The v7.0 release further increases and enhances functionality, making SM-Plus for Sage MAS 500 the optimal tool to maximize service efficiency and bottom-line profit potential.

### Incident Escalation

In call center management it is critical to meet or exceed customer expectations. Therefore, an automated notification process has been introduced. The user can leverage several notification styles and set a frequency for each priority setting they support. Therefore, as follow-up, warning, and due dates approach, the state of the incident can be escalated to the designated personnel.

### Service Level Agreements

The Incident Escalation architecture can be leveraged in conjunction with Service Contracts to implement Service Level Agreements. Configuring contract priority levels along with the material and labor entitlements which already exist, a SM-Plus user will be able to generate service level agreements for their customers.

### Parts Fulfillment

Parts needed for an installation or repair are not always readily available in inventory. Typically, this meant the service work was put on hold until the part was received. In the meantime, resources were shuffled to other tasks and, unfortunately, the original service request likely lost its place in the queue. By the time the missing part arrived, the service request was forgotten. Now, v7.0 enables the service department to easily see when the missing part is received and returned to inventory. Thus, the service scheduling manager can expediently reactivate the tasks and dispatch a resource to complete the service request without additional delays.

### Quick Contract Line Creation (Advanced Version Only)

For service companies which heavily utilize service contracts; manual data entry to maintain contracts upon sale of new units can be cumbersome. Therefore a "build from" solution has been devised to streamline this process. Once a contract header has been created and configured, the user can simply choose the "build from sales order" button to have the system create one contract line for each item of a sales order. Additional information required to configure a contract line will be defaulted from Service Item settings.

### Automatic Contract Revision (Advanced Version Only)

When new parts are shipped and defective parts are returned, contracts need to be adjusted to reflect these changes. For companies that have large volumes of exchanges and returns, the manual process of keeping the contract accurate can be overwhelming. For these customers the option to turn on automatic contract revision is provided. By enabling the system-wide option, any time a service transaction is performed on a unit which is under contract, the system will make the appropriate adjustments without any user intervention.



**Consistent, effective management  
of extended service agreements  
is critical to customer satisfaction.**

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## Express Order Billing Code

The SM-Plus Express Edition has been enhanced to allow a different billing code to be assigned to material and labor transactions. This provides the flexibility to have material services covered under warranty while at the same time charging for labor performed.

## Transaction Error Notification

For users entering large volumes of transaction data, being able to see if an error exists for a transaction of another type (on a different tab) is very helpful. To increase visibility, v7.0 now allows the user to choose "Proceed" on the SRO Transactions screen and if any transactions (Material, Labor or Miscellaneous) have an error, a warning message will be presented to the user.

## Unit Creation from PO Receipt

Upon a receipt of a serial-tracked item into inventory, the system will support automatic creation of a Service Unit.

## Preferred Bin Support

Sales Orders Shipping in MAS 500 provides the ability for bins to be flagged as preferred so that material does not need to be manually distributed. Service management has been enhanced so that both planned and actual material transactions will observe the preferred bin functionality. When a service transaction is posted, the inventory will be auto-distributed.

## Service Scheduling Miscellaneous Entries (Advanced Version Only)

While in Service Scheduling, the user will have the ability to launch the miscellaneous transaction screen to facilitate quick entry. This additional functionality will allow some users to perform a large percentage of their job within the scheduler, improving productivity and usability.

## About Single Source

Established in 1985 as an information technology consulting and software development company, Single Source develops and supports software designed to improve operational efficiencies for mid-sized service-centric organizations. Single Source is a Sage Endorsed Solution Partner and Endorsed Development Partner. The flagship product, Service-Management-Plus (SM-Plus), fully integrates to Sage MAS 500 ERP, providing companies the ability to optimize the efficiency of their service management operations. Single Source is a Microsoft Gold Certified Independent Software Vendor (ISV), providing development, support and consulting services for more than 450 customers globally.

## ALSO NEW:

### Advanced Quote Management (AQM) for Sage MAS 500

Single Source AQM's rules-based configurator allows channel and direct sales representatives to create fast, accurate quotes for complex products, installations and services, often while in the field and still engaged with the customer. The configurator also allows engineering to easily maintain product changes and related installation and service costs. The result is a streamlined quoting process which meets customer expectations and speeds the quote-to-cash cycle.



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