

Reflex

SERVICE MANAGEMENT



Experience a comprehensive solution for service-oriented companies.

Create service requests and convert these requests to quotes and service orders once accepted by the client—all in one fully integrated software package.

With Reflex, companies in the service management industry can keep track of information from initial request to project close. Process quotes and orders, have full access to inventory items, or buy-in directly to the service order within Reflex.

Manage every aspect of your properties with our property management-specific modules:

Labor Hour Tracking
Subcontractor Tracking
Equipment and Materials Tracking

Daily Assignment Sheet Creation
Schedule and Resource Assignments
Service and Work Orders
Estimated and Actual Gross Margins

Web Portals
Analytics, Business Intelligence,
and Reporting

Service Requests

The screenshot displays the 'Service Order (Demo Master)' interface. It is divided into several sections:

- Request Reference Information:** Includes fields for Service Class (Residential), Service Type (Service), Quantity (1.00), Unit of Measure (As Per Plan), Warranty, Billable?, Billable Amount, Reference Type (Sales Order), Reference # (2), Description (Repair residential trim), Estimated Amount (2,500.00), and Estimate Type (Construction).
- Schedule Information:** Shows Preferred Date (9/15/2017), Preferred Time (12:00 PM), Scheduled Date (9/15/2017), Scheduled Time (2:00 PM), Site Contact (David (780-885-5544)), Method Of Contact (Ph...), Service Area (Alberta), Assigned To (Troy Davis), and Entered By (reflex).
- Request Tasks:** A table with columns: Seq, Service Code, Description, Extended Description. It shows one record: Seq 1, Service Code SVC, Description Service Call.
- Component Details:** A table with columns: Type, Part #/Code/Class, Description, Component, Seq, UOM, Required Qty/Hrs, Unit Cost/Rate, Sell Price. It lists Raw Materials/Inventory (A SWG10 BLK Accessory Screws Woodgrip #10 ...) and Labor (CARP Carpenter).
- Misc Charges:** A table with columns: Misc Code, Description, Qty, Unit Price, GST, PST, Extended Price. It shows a total of 0.00.
- Summary:** Total Cost 97.35, Total Sell Price 136.00.

Create service requests and convert them to service quotes and service orders (billable, non-billable, and warranty) in Reflex. Enjoy full historical tracking of the initial request through service order, assignment, work completion, and billing.

Service Order Scheduling

The screenshot displays the 'Service Order (Demo Master)' interface for scheduling. It features a main grid and a calendar view on the right.

- Grid View:** Shows a scheduling grid for January 15, 2018. A service order is scheduled for Tuesday, January 16, from 1:00 PM to 2:00 PM. The service order details are: Service #: 40002, Assigned To: Troy Davis, Sport Check Panel Fix.
- Calendar View:** Shows a calendar for January 2018. The date January 16 is highlighted in orange, indicating the scheduled service order.

Scheduling can be assigned to internal resources or external subcontractors and daily assignments can be allocated by a service manager within a defined region (or based on the service technician).



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