

SM-Plus™

For the Business of Service



Access to information increases productivity company-wide.

Managing the service-intensive organization with one, integrated enterprise software solution

Best-in-class companies that sell and service or install high-value, technical or industrial products turn to customer-centric business models, increased efficiency and reduced waste as the best means to profitable growth. Throughout the organization, optimizing productivity, streamlining operations and minimizing redundancies are essential for the company that wants to achieve more, using less resources.

Because it provides one integrated business solution, SM-Plus™ helps organizations meet productivity goals in every area, from accounting to sales and service. This company-wide approach to streamlining operations positions companies to take advantage of every opportunity for savings and growth.

SM-Plus supports advanced enterprise management functions like accounting, inventory, purchasing, distribution and human resources, plus addresses the unique requirements of the entire service-focused enterprise. With total flexibility, SM-Plus manages not only the customer support center, scheduling & dispatching and field service...but also depot repair, installations and service contract management. Plus, mobile and web extensions keep field personnel in contact.

With SM-Plus, the entire company is connected with convenient, real-time access to the same reliable information. This system-wide visibility, efficiency and reliability make it possible to support the most demanding customers and the most critical assets. When service matters most, SM-Plus is the enterprise solution of choice.



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Benefits

Integrate Systems.

Eliminate the need for multiple disparate systems.

Manage Financials.

Increase reliability through accurate invoicing and AR/AP.

Increase Customer Satisfaction.

Increase reliability and responsiveness.

Develop Competitive Edge.

Stand apart from competition because of superior service, quality and efficiency.

Lower Costs.

Streamline the entire operation, including HR, financials, inventory, purchasing and sales/distribution.

Increase Sales.

Take advantage of opportunities for add-on and repeat sales.

Broaden Reach.

Synchronize regional and worldwide operations and manage multi-site, multi-national growth.

Speed Cash flow.

Ensure timely, accurate billing including customer-specific detail.

Boost Profits.

Analyze activities, contracts and customers for profitability.

Manage Resources.

Efficiently use equipment, materials and labor. Automate routine tasks.

Manage Intelligently.

Connect products, parts and services to financial consequences; drive for maximum performance.

SM-Plus Enterprise Management Product Data Sheet

SM-Plus Enterprise Management enables total visibility

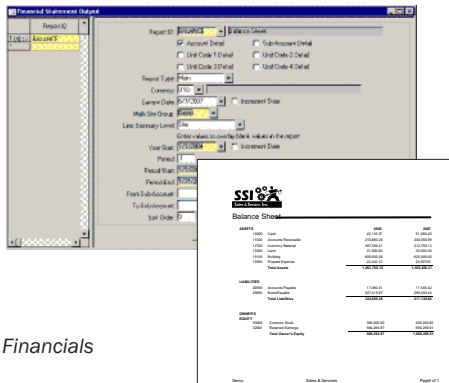
Eliminating redundancies, improving decision making

A service-centric organization builds its business around hard-to-measure intangibles, like responsiveness, reliability and customer satisfaction. And, yet, accurate business systems that measure and manage performance based on current data are also essential to support profitable growth.

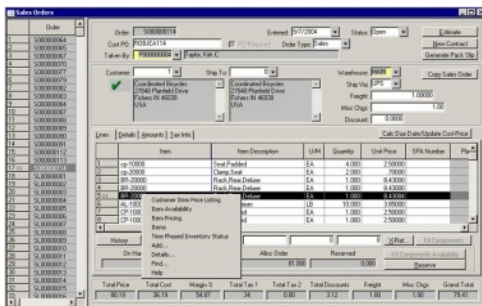
General purpose accounting and enterprise software products typically provide bolt-on modules to manage service functions. This may be sufficient for companies with a small service department but not for those who rely on service as their key business or at least a strategic component. In contrast, SM-Plus supports “back-office” functions like accounting, inventory and purchasing AND manages the “front-office” customer service lifecycle, from issue tracking, depot repair and installations.

By providing one integrated system, SM-Plus provides visibility into the entire company's performance, productivity and profits, all up-to-the minute with dependability. Overall results, not just isolated performances, can be reported, analyzed and shared. Redundancies and gaps are eliminated. No more time wasted pulling information from multiple disconnected systems.

Information flows freely between departments, preventing confusion and encouraging a fact-based decision-making culture. Company-wide access to the same data, from customer service history, to service level entitlements, to the overall profitability of customers, products and technicians, helps employees better meet customer needs and support profitability goals. This results in better service for customers, a positive work environment for employees and optimal profits for key stakeholders and executives.

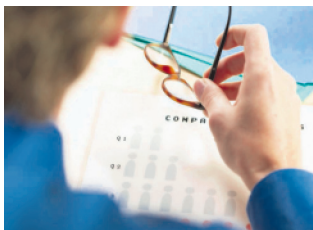


Financials



Sales Order Processing

Financials



Consolidate all transactional data into a central financial system for a single view of company performance.

- AR/AP and GL
- Distribution journals for pre-period close analysis
- Banking deposits and account reconciliation
- Amortize revenue and/or expenses
- GL/Journal transaction drilldown to details
- Multiple and alternative currencies
- Multi-site, enterprise reporting and consolidation

Sales/Distribution



Manage and process customer quotes, orders and inquiries quickly.

- Quoting/estimating of equipment sales, parts, service orders and contracts
- Sales order creation from estimate or existing order
- Item availability and sale history visible during order entry
- Cost/price/margin visible at order entry
- Flexible item price matrices, mark-up tables & volume discounting
- Integrated sales orders with pick, pack and ship fulfillment
- Kitting support including inventory relief by kit/item
- Sales orders linked to purchase orders to support distribution sales models

Purchasing



Match people, parts and customer requirements to improve first-time fix rates.

- Vendor performance analysis
- Request for quote support to find the best price or quickest delivery
- Vendor drop ships
- Preferred vendor/item ranking
- Automated purchase order creation to fulfill service and sales demand
- Workbench view of complete list of purchasing requirements
- Automated allocation upon receipt of items on a purchase order

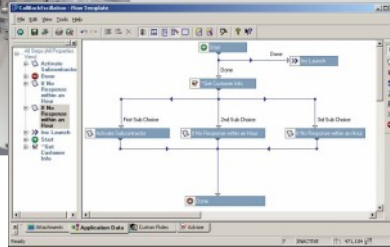


SM-Plus Enterprise Management and Service Management functions work together as a total business solution to support best-in-class performance for service-intensive companies, especially those that sell, install and service high-value, technical assets like industrial, high-tech and medical capital equipment and systems.

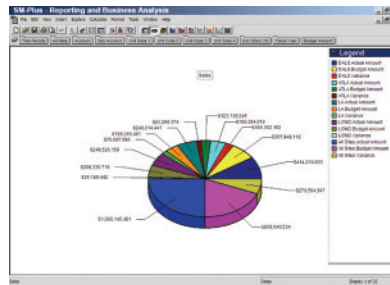
Implement & Reinforce 'Best Practices' Every Time

SM-Plus provides the total business solution needed to ensure best practices are implemented on a consistent basis throughout the company. Connections between sales, service and finance speed response times, cash flow and decision making. Unlike other packaged software products that require users to adapt their processes to fit the software, SM-Plus adapts to the organization's current processes plus can be reconfigured as needed.

When critical processes must be followed to ensure customer requirements and/or internal procedures, SM-Plus can be configured to drive consistency. For example, it can require a purchase order be entered to authorize a field purchase, disable technician scheduling when a customer is on



Workflow Automation



Performance Management

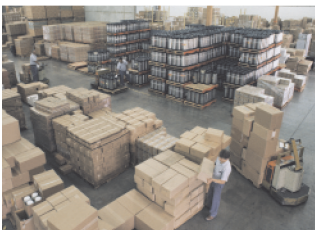
credit-hold or automatically notify accounts receivable and require credit approval before orders can be completed/shipped to a new customer. Virtually any manual process can be automated for maximum efficiency.

Fully Integrated Service Management

Unlike typical enterprise software products that offer bolt-on modules or 3rd party products to address post-sales service processes, SM-Plus is purpose-built for the unique needs of service-centric organizations. SM-Plus Service Management functions tightly integrate with Enterprise Management functions providing total service support, including:

- Contact center and customer service & support
- Incident tracking and escalation
- Resource scheduling (people, parts & routes)
- Service technician dispatch
- Work order management
- Service contracts and SLA compliance
- Field service with wireless mobile & web access
- Depot repair and returns service management
- Installation project management and tracking
- Remanufacturing/refurbishment & core tracking
- Labor and material tracking per job
- Preventive maintenance schedules

Inventory



Optimize inventory levels to eliminate "no-parts" calls & excess carrying costs.

- Serial number and lot tracking
- LIFO/FIFO/Lot-Specific/Standard/Average/Serial level costing options
- Min/max item inventory level to identify "reorder" points
- Automated material planning supports maintenance parts requirements
- Lot, location and serial tracking for inventory control
- Setup default warranty levels and preventive maintenance schedules
- Multiple warehouse support including technician "truck stock"
- Physical inventory and cycle counting with barcode capabilities

Human Resources



Manage employee technician and/or subcontractor information to ensure the right resource is assigned to every job and paid correctly.

- Technician skills and certifications matching with job requirements
- Configurable technician available work hours/hours per week
- Hours worked/hours billed pulled from work orders to drive payroll
- Partner expense tracking, approval and reimbursement
- Track salespersons commissions due/paid
- Optional payroll interface works with Sage ABRA or external payroll service
- Optional Sage ABRA Payroll software for in-house payroll processing

Performance Management



Analyze financial and operational data with built-in reports and analysis tools for real-time visibility and informed decision-making.

- Built-in Crystal Reports with Report Designer
- Sales analysis by customer, product, service order and more
- Profitability by service order, job, technician, hours worked/billed
- Optional Executive Dashboard for real-time monitoring of Key Performance Indicators (KPIs)
- Cognos Business Intelligence Suite data warehousing option
- Built-in data graphing function for quick analysis
- Quick export to Microsoft Excel to perform pivot table analysis



CMS is one of the nation's largest commercial and industrial mechanical contractors, providing HVAC and electrical service for national customers, including retail chains, hospitals and schools. SM-Plus is the software system CMS uses to meet customer expectations and manage resources efficiently.

Success Story: CMS Mechanical Services

CMS Mechanical Services, an independent service company that handles commercial HVAC, plumbing and facility management, sought a total business solution to help it become more efficient as it provided service to its customers, many of them Fortune 500 companies with high expectations. SM-Plus was their solution of choice. With 60+ office users, 120+ field technicians, a centralized contact center, 400+ subcontractors, and complex service contracts, CMS required an integrated platform that could efficiently manage both business and service functions. The result: SM-Plus helped CMS achieve 10% labor cost reductions due to smarter scheduling and improved utilization.

Proven Across Several Industries

SM-Plus functions effectively for manufacturers, distributors and independent service organizations working in many asset service-intensive industries, including:

- Aerospace systems & components
- Boats, yachts and marine
- Capital & industrial equipment
- Fire & security systems
- High-tech electronics
- HVAC & mechanical
- I.T. equipment & networking
- Laboratory & diagnostic devices
- Medical capital equipment
- Specialty vehicles (motorhomes, fire trucks, ambulances, etc.)
- Telecommunications equipment
- Utilities

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Flexible and Reliable Microsoft-based Technology

SM-Plus uses the Microsoft technology platform, including SQL Server 2003 and Exchange Server 2003. It presents data in a Microsoft-like interface and manages data in a method similar to Microsoft Excel, a tool most users already know. For the company's unique needs, SM-Plus enables personalization at the company, group or user level, without costly software modifications. Administrators can easily add, remove and edit fields, labels and complete screens without the need for technical programming. Plus, time invested is not lost when the system is upgraded. As the business grows, the system will continue to support it. SM-Plus integrates and connects with internal systems, mobile devices, customers, suppliers and subcontractors via standard B2B web interfaces and XML document translation.

Experienced Implementation and Training Professionals

Single Source and its global network of implementation and training professionals possess deep knowledge and expertise in implementing business management software systems. More than "point-and-click" software experts, Single Source consultants and trainers average nearly 15 years of industry experience. Working together with the client's project team, Single Source consultants, trainers, project managers and technical engineers know how to keep projects on time and on budget.

Responsive Global Customer Support

Even after clients "go-live" on SM-Plus, a team of support professionals is available to help. As part of the annual maintenance and support agreement, clients have full access to phone, email and web-based support, software upgrades and service packs. Additionally, when special circumstances like weekend upgrades or live cutovers require additional assistance, customers can contract Single Source support professionals to assist onsite or standby on-call 24x7.

About Single Source

Established in 1985 as an information technology consulting and software development company, Single Source builds, markets, sells, implements and supports enterprise software applications designed to improve operational efficiencies for mid-market manufacturing, sales and service organizations worldwide. As a Microsoft Gold Certified Independent Software Vendor (ISV), Single Source serves more than 400 customers globally, helping them manage the challenges of delivering total, responsive service while also optimizing resources and boosting profits.