

Features included with Service Estimator Pro



Restrict access to sensitive data and any areas reserved for administrative managers. User login is required each time the program is initiated.

Console provides easy access to all built-in features: create users, manage prospects and customers, create estimates, and review reports.

- **Contact Manager** - Manage your prospect activity, notes and email directly from Contact Manager. Once your prospects have been qualified create instant estimates
- **Customer Manager** - Spreadsheet type view that allows you to scroll through your estimates; filter by estimator, by status , manage notes, etc.
- **Personnel Manager** - Create users, store resume info and employee photos. Administrative security prevents unwarranted access to the Personnel Manager.
- **Outlook Reminders** - Outlook reminders can be accessed from the console or set up in Business Options to open each time the program is initiated
- **Import/Export Data** - Easily import existing customer, prospect or vendor databases using the pre-designed Excel templates that are provided. Export data from Service Estimator into your existing CRM with CSV or Excel spreadsheets
- **Reports** – You can access all of your reports from the console
 - **Sales Reports** - Confirm sales and prospect activity. Track by date, employee or agreement type. Summaries by month, year or S/L/A status. (Sold, Lost, Abandoned)
 - **Estimate Reports** - Includes a summary report, which allows you to verify estimate prior to generating a proposal. Create equipment, filters, belts and subcontract reports for each estimate.
 - **Equipment Tasking Reports** - Generate equipment-tasking reports for each piece of equipment listed in an estimate. Great sales aids for final presentation.

- ✓ **Backup/Restore Database**
- ✓ **Create Additional Databases**
- ✓ **Preloaded Equipment, Filter & Belt Databases**
- ✓ **Global Data Update**
- ✓ **Four (4) Proposal Templates**
- ✓ **Store Equipment and Site Photos**
- ✓ **Site Survey Tools**
- ✓ **Operating Cost Analysis Tools**
- ✓ **Sales Support & Management Forms and Tools, Including Dashboard**

Backup your data regularly with one click. Should data loss occur, you can easily restore your database.

With Service Estimator Pro you can create any number of databases, which allows you to establish different pricing strategies in regional offices, as needed.

- **Equipment** - The equipment database contains over 450 types and sizes of mechanical equipment, as well as related controls components. Tables include labor requirements and materials costs for each item in the list.
- **Filters & Belts** - Over 150 filter types, sizes and efficiencies and over 1,000 belt types and sizes. Tables include labor requirements and material costs for each item in the list

Easily update labor and material costs globally, in all tables, by \$ amount or percentage.

All Microsoft Word ® document templates are completely editable. Easily design your own layout, add corporate logo, etc.

Equipment photos are easily uploaded for each piece of equipment in an estimate. Helps trigger memory of survey conditions and environment when referring back to an estimate for analysis.

All necessary forms and procedures to conduct a site survey. Equipment Data Collection form matches data entry screen to assist data entry clerk.

Collecting financial data from the customer and performing a cost comparison is easy with the Operating Cost Analysis worksheet.

- Support forms and sales tools include a PowerPoint 1st call presentation strategy to keep you on track with your agenda. Also includes sample letters and operations procedures for managing your agreements after the sale.
- Stay on top of your sales efforts with the sales management forms and tools. Get a quick snapshot of sales and prospecting activity right from the console.