

ACTIVANT CATALYST INSTALLED SALES



MANAGE ALL PHASES OF INSTALLATION AUTOMATICALLY, EFFICIENTLY AND PROFITABLY

Whether your primary customer base includes contractors, production builders, homeowners or a mix, installation services can do a lot for both your revenue and your reputation. But managing the business process of installed sales can be complicated, affecting virtually every aspect of your business: estimating, inventory and labor management, accounting, use tax tracking and customer service.

Activant Catalyst® Installed Sales lets you manage it all by defining your own set of installation phases, to track materials, labor and time, precisely how you need to. You choose the depth of detail to match your management needs—and you can avoid any customer confusion by choosing separately how much detail to display on customer quotes.

Installed Sales then seamlessly converts quotes into work orders: one order for the entire job, or one for each phase. After each installation team completes its phase of the project, you can create work-in-progress invoices to maintain cash flow as the project moves forward.

Combine Installed Sales with the single-line-item billing power of Contract Billing, and you'll have even more flexibility. Avoid endless physical inventory counts by tracking off-site inventory dollars in the general ledger as you move materials from the selling location to customer sites. Implement phased, in-progress billing even if you haven't set up separate work orders for each phase.

Installed Sales also handles use taxes properly to keep financials accurate without confusing customers. There's also a range of concise management reports so you can evaluate this important part of your business and make decisions that improve profitability today.

Whether you're planning to expand your installation business or simply refine control over your current operation, Installed Sales gives you powerful management and billing capabilities you'll want to have—and your customers will really appreciate.

BENEFITS

- Organize and track your installation business with ease, setting up install types, installation phases and status codes to track your company's unique business processes
- Combine cash flow with simplicity by invoicing at the end of each phase
- Track material moves to off-site locations without creating unwanted invoices
- Easily meet your state's sales tax, use tax and deposit limit requirements
- Manage profitability by comparing estimated and actual costs for both materials and labor

KEY BENEFITS OF ACTIVANT CATALYST INSTALLED SALES



Manage complex installation jobs with phases you define including quoting, ordering, scheduling, tracking and invoicing, to maximize cash flow.

- Maximize flexibility by including any materials, regardless of physical location or shipping status, on an installed sales ticket
- Define phases for framing, insulation, drywall, or whatever makes sense for your business, so you can assign both labor and materials SKUs to any phase
- Control large projects by creating a work order for each phase, while keeping smaller jobs simple with a single work order for the entire quote
- Add internal or subcontract crews and labor to each phase, and pave the way for later analysis by including hour and rate estimates
- Choose from multiple print options to include desired level of detail on quote

Meet compliance requirements for sales and use tax

- Installed Sales computes use tax based properly on materials costs only. And, since it's a cost of doing business, use tax reduces gross profits on your financial reports
- Because it's a tax paid by suppliers, not customers, use tax is not reflected as a tax on the quote or invoice, avoiding any customer confusion

Manage inventory on- and off-site for accurate accounting and replenishment planning

- Installed Sales pick tickets include materials and special order items, but not labor
- You'll know precisely what inventory has been shipped off-site even if it hasn't yet been billed (requires Contract Billing module)

Track and evaluate labor costs for maximum profitability

- Installed Sales enables accurate costing by integrating labor with each sales order
- Pinpoint estimating issues and minimize cost overruns by comparing estimated and actual labor costs side-by-side

Intuitive accounting processes reduce confusion and customer service calls

- Invoice entire job or each phase, including materials and labor
- Combine Installed Sales with Contract Billing, and your customer can receive one invoice per phase or one for the entire job, regardless of the number of materials shipments to a job site
- Keep cash flowing with optional down payments, and phase-based periodic billing

Customer relationship management preserves your solid reputation

- Installed Sales lets you take advantage of the Service Call Tracking feature to ensure timely customer follow-up on installation service issues, upcoming warranty dates, and more

ABOUT ACTIVANT

Activant, a leading technology provider of business management solutions serving small and medium-sized businesses, offers customers tailored proprietary software, professional services, content, supply chain connectivity and analytics. Activant's systems are designed to help customers increase sales, boost productivity, operate more cost-efficiently, improve inventory turns and enhance trading partner relationships.

To learn more about this or other Activant products and services, please call 800.688.9606.



ACTIVANT

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