

SAMProEnterprise by Data-Basics, Inc.

SAMPro Enterprise Anywhere Suite Mobile Components & Web Portals



Leading the Development of Service & Construction Management Software Since 1974

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Explore SAMPro Enterprise ERP at www.Data-Basics.com

Learn more about SAMPro service and construction management products.

All Mobile Components and Web Portals are Fully-Integrated with the
SAMPro Enterprise Database & Back Office Components

Field Service Management

Enterprise Accounting

Construction Management

Inventory & Procurement

Document Management

It All Works Together...

Customizable Automation Technology: Rules-Based Management (RBM)

RBM technology is what sets SAMPro Enterprise apart from other software packages. This signature technology works throughout your SAMPro system to automate many day-to-day personnel tasks for a streamlined workflow and consistent, high-quality service. RBM empowers your firm to establish a set of rules that are automatically enforced at the first sign of a potential problem. Management by exception, proactive e-mail alerts and push technologies all work together to free up valuable resources and allow your key staff to focus on growing your business.

DBXChange: Secure Data Distribution

DBXChange securely connects SAMPro Back Office, Mobile and Browser Components for safe and assured communications with your database. Using your own customized set of established RBM “rules,” DBX-Change prevents costly clerical errors by facilitating the distribution of real-time data *throughout* your system.

Escalation Manager: Workflow Automation

Escalation Manager is service workflow automation software with the power of RBM technology. Your *user-defined* “escalation profiles” enable the system to e-mail or text a manager if a work order falls out of spec. Escalation Manager can trigger an event anytime the status of a work order changes. For example, it can send confirmation of work requested, notification of work completed, or thank you e-mails to customers once a service is complete. This multifaceted functionality removes a great deal of human intervention from routine processes, helping you to more efficiently allocate (or reduce) resources for any service department and improve your client-facing abilities.

ReportAnywhere: Real-Time Automated Reporting

Using RBM and working in tandem with Escalation Manager, ReportAnywhere automatically delivers customizable, detailed reports, pertinent to each manager’s department and responsibilities. ReportAnywhere works with all back office and field operation components by providing you with real-time information necessary to both anticipate opportunities and avoid potential problems.

Embedded Business Intelligence Software

Analytics are used to identify trends that support decision-making. DBAnalytics transforms your data into a vivid, multi-dimensional portrait of your business activities. Access instant, real-time business analytics with rich, informative and easy-to-create interactive management dashboards that run in any browser locally or in the field. Multi-level analytics can be created so that supporting data and drill-down reports are just a click away.



- Improve & Expedite Decision-Making
- Align Resources with Strategies
- Recognize Cost Inefficiencies
- Improve Competitiveness
- Synchronize Financial & Operational Strategies

As an integrated component of our ERP system, DBAnalytics functions seamlessly with your entire database, delivering the ultimate in precision reporting on any scale. The portal adopts responsive design for dynamic display on phones and tablets to provide touchscreen friendly access from anywhere.

Real-Time, Secure Collaboration

Secure collaboration delivers real-time data on demand, so your managers can utilize information for very specific departmental needs. Automatically saved dashboard configurations provide individual users in any department a deeper and more detailed understanding of efficiency, market trends, and even predictive decision-making.

Integrated Analytics

Confident, Fact-Based Decision Making Throughout Your Enterprise

Whether you are monitoring individual departments, teams or the company as a whole, our business analytics software keeps you connected and informed about how your company is performing against an unlimited, customizable set of predetermined goals and measures.

Overall, DBAnalytics provides organizations with new insights and better answers, helping you to manage risk, improve ROI and increase output.

- Real-Time Mobile Access From Any Browser
- Track Unlimited Key Performance Indicators (KPIs)
- Measure Performance Against Goals
- User-Defined Dashboards
- Join Data from Multiple Sources
- Multi-Level Analytics
- Multi-Company Analytics
- Data that Auto-Refreshes

DBAnalytics can access data stored in every component of the SAMPro Enterprise ERP system to track everything from individual technician work performance to your company's overall financial picture. Distinctive reports can be set by various profit centers and easily managed via user-definable graphs and charts.

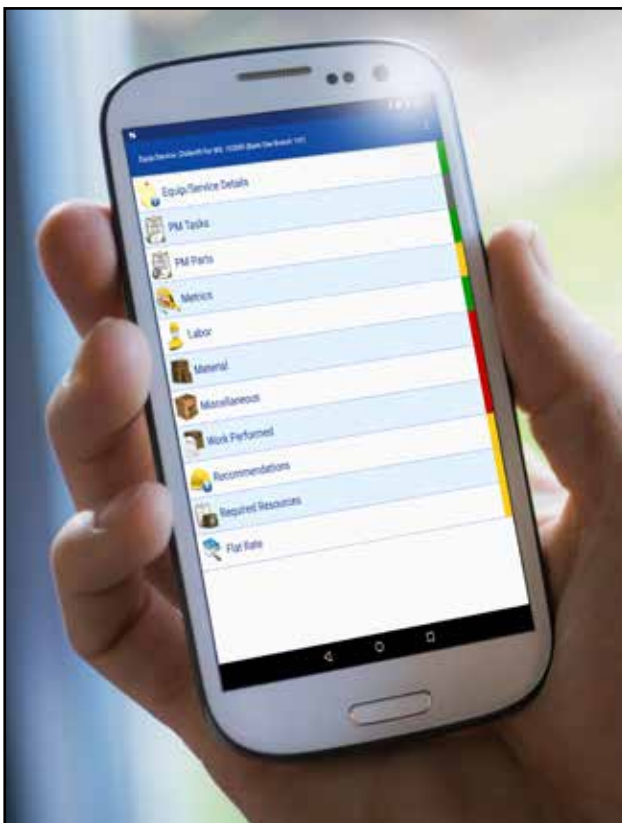
DBAnalytics allows for an unlimited number of inquiry reports such as:

- Service Quality
- Customer Satisfaction
- Response Time
- Inventory Management
- Tech Performance
- Current Resource Allocation



Mobile Field Service Software for Technicians

TechAnywhere does more than simply streamline and enhance communication between the field and your back office. As part of the SAMPro Enterprise ERP system, seamless integration supports the two-way communication and access to information necessary for your technicians to perform their job optimally. Configuration settings allow your firm to control workflow between the office and the app.



- **Greater Accuracy**
- **Improved Efficiency**
- **Real-Time Communication**
- **Store & Forward (Works Offline)**
- **Finally Go Paperless**

Our user-friendly platform was designed to deliver the on-the-job functionality and convenience your techs demand when on a jobsite.

Techs can easily access client and equipment information, work history, blueprints, or schematics to help them expedite repair times. TechAnywhere works to maximize performance, productivity and client satisfaction all at once.

Advanced Technology in Communication

TechAnywhere's power as an advanced communications tool is just the beginning of its functionality. New information entered by your field service team can now be shared instantly with your back office, automatically updating work order status, quote creations, labor, materials, inventory and more... system-wide.

Utilizing secure, password-protected connectivity, your technicians can easily capture vital client information, report activity, update work orders and much more through any Android wireless device. With the accuracy of information recorded directly from the field and the added power of "store and forward" synchronization when out of network range, you'll never lose work order data again.

Mobile Technician Software

On-Demand Access to Information

- Real-time, on-demand equipment / metrics history look-ups & inventory stock status look-ups
- Refrigerant tracking and reporting
- Access to pertinent records & documents
- Quoting capabilities in the field

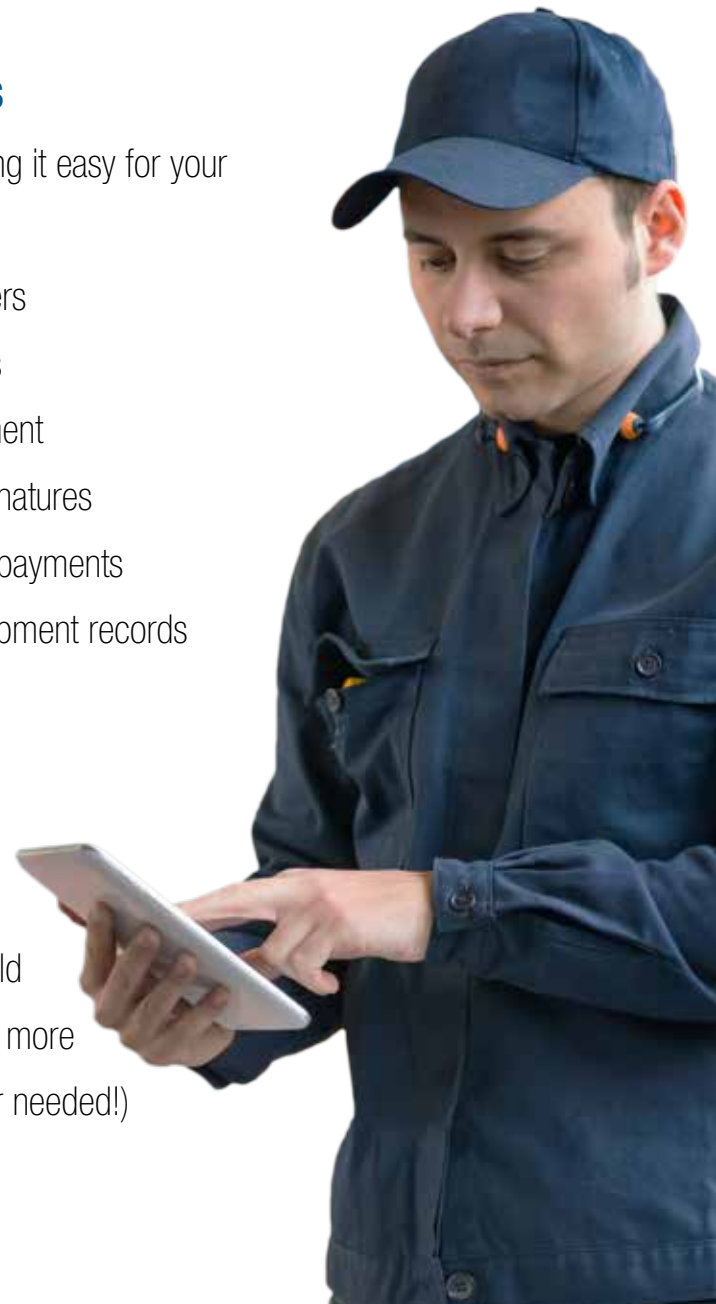
Convenient Platform Designed for Technicians

TechAnywhere is designed for on-the-job convenience, making it easy for your field team to:

- Navigate the menu
- Change screens
- Enter information
- Capture detailed images
- Create purchase orders
- Create quotes from the field
- Create new work orders
- View new work orders
- Order parts or equipment
- Capture electronic signatures
- Receive and process payments
- View and update equipment records

A True Paperless Solution

- Completely eliminate double-entry of work order data
- Add labor, material and inventory to work orders
- Allow “on-call” technicians to create work orders in the field
- Manage files including photos, checklists, schematics and more
- E-mail work order receipts and invoices (no mobile printer needed!)
- Integrated camera and barcode reader support
- Supports unlimited customized PDF entry forms



Customer Self-Service Web Portals

FMAnywhere is a browser-based tool that allows your customers a secure and easy way to review their service requests and invoices, enter a new service request, approve a quote, and much more. FMAnywhere is configurable to put you in full control of the information your customers have access to.

- Intuitive easy-to-use interface with graphical presentation and detailed reporting
- Concise presentation of all client sites with all equipment and service history
- Robust presentation of billing by site, service category, invoice, and/or timeframe
- Analyze “spend” by region and branch
- Billings by type of service
- Drilldown by store, service, invoice number, etc.
- 35+ analytics available
- Data that auto-refreshes

Your business and your customers will both enjoy the convenience and time savings that our browser-independent, self-service portals offer.



Unique portals can easily be made for individual customers. You can set up customer dashboards to include open work orders, open quotes, closed quotes, open invoices and billing history.

All information is auto-synced with SAMPro, delivering up-to-date, real-time data, 24/7 for you and your customers. Self-service portals with reporting and analytics add value to the quality service you provide your customers year after year.

Customizable Self-Service Portals

Powerful Reporting & Analytic Capabilities: Service Your Competition Can't Match

The FMAnywhere customer self-service portal is a service in itself. Once created, client dashboards are locked so they are read-only and cannot be changed, but still allow your customers the access they need to make better, more informed decisions about their service needs. The amount of information accessible is limited only by you and can be different for each customer.

Supported by the power of DBAnalytics, FMAnywhere's on-demand reporting and analytic features are unmatched. While customers enjoy the convenience and reporting features of their self-service portal, your business can quickly realize the effects of increased efficiency.

- **Create & Manage Work Requests**
- **Streamline Quotes & Estimates**
- **Customize Per Client**
- **Real-Time Information Access**
- **Secure, Historical Data Storage**
- **Advanced, On-Demand Reporting**



Rules-Based Management Automation

Our system automation makes it easy for your staff to handle increasing service volume. As a fully integrated component of the SAMPro ERP software system, you can configure your FMAnywhere customer self-service portal to automatically generate work orders submitted by your customers. You can also create and define a variety of custom problem codes and escalation profiles for use in FMAnywhere.

Remote Time Entry Web Portal

To accommodate your increasingly mobile workforce, TimeAnywhere is remote timesheet software that makes it easy to enter labor and expenses whether in the office or in the field. As a web-based application, TimeAnywhere not only allows timesheet entry from virtually anywhere in the world, but also enables easy reporting once your employee's time is entered in the system.



- Intuitive User Interface
- Time & Expense Data Collection
- Real-Time Project Management Reporting
- Fully Integrated with SAMPro's Payroll & Industry Leading Payroll Processors

As part of a complete ERP system, when used in conjunction with DBAnalytics, TimeAnywhere can also provide project managers with up-to-date, daily reports on the hours that are applied to their jobs.

The TimeAnywhere remote time entry web portal expedites employee management and expense tracking. TimeAnywhere can be customized to accommodate any number of employees and job categories and can be used by your construction, service and back office workforce. In addition, crew chiefs have the option to enter time for user-defined crews.

Eliminate Time Entry Errors

TimeAnywhere streamlines the time entry process as all job entries can be logged into the system quickly and easily. Submitted time information automatically populates throughout SAMPro Enterprise, eliminating the expense of duplicate data entry and costly clerical errors.

Time Management Web Portal

2016 Gold Dealer Design Award

TimeAnywhere received the 2016 Gold Dealer Design Award for Services and Software from *The News* HVACR Magazine. It was developed to answer the universal challenge shared by service and construction organizations for the recording and administration of accurate time entries for labor management.

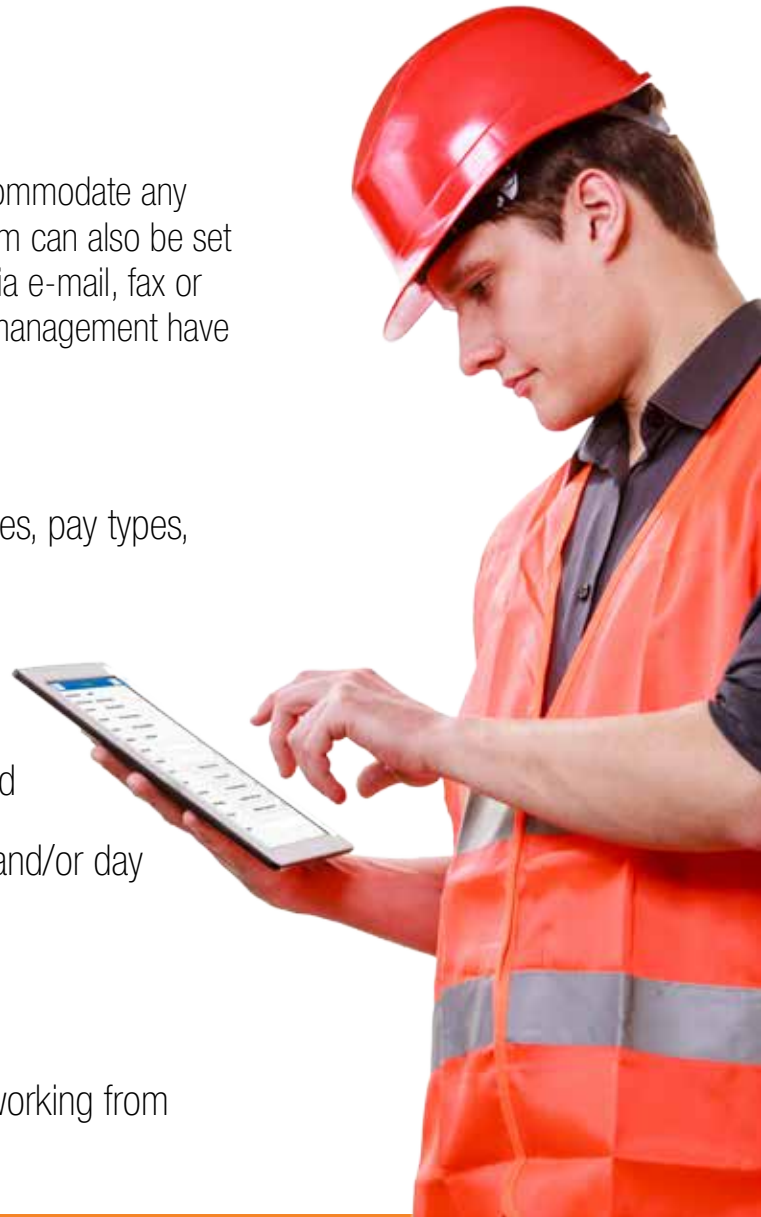


TimeAnywhere is a user-friendly tool for employees that feeds a powerful management system. Designed for the labor management needs of complex construction/service organizations, it fully replaces outdated, paper-based employee labor management practices that can impact your bottom line.

Customized for Your Company

Our remote time entry software can be customized to accommodate any number of jobs, cost codes and cost categories. The system can also be set to automatically update and distribute a variety of reports via e-mail, fax or posted to DBAnalytics. Payroll productivity and labor cost management have never been easier.

- Distribute time to multiple jobs, cost codes, categories, pay types, and more
- Customize on-screen descriptions to match your company's standard terminology
- Enter time and expenses from anywhere in the world
- Audit employee time entry by payroll period, week and/or day
- View entries for all active payroll periods
- View past PR stubs & data
- Optimize day-to-day operations at the office while working from home or on the road



Customer Relationship Management Web Portal

CRMAnywhere uses the power of SAMPro Enterprise to look at customer relationship data in a new way; to manage, decipher and transform information into increased sales and new business revenue. What makes CRMAnywhere so powerful is its ability to provide the universal connectivity and visibility necessary for your entire team to cross-sell and up-sell more effectively, close deals, retain current customers and personalize customer service.



- **Unify Your Sales Team**
- **Gain & Maintain Customers**
- **Manage Opportunities & Activities**
- **Track Customer Activity**

By fully interfacing with other enterprise applications like DBAnalytics, ReportAnywhere and FMAnywhere, our customer relationship management software is able to provide connection opportunities throughout the sales cycle in addition to making operations more efficient.

For Partnerships That Last

Secure, organized, and accessible information received from prospects sets the foundation for winning bids and establishing strong, long-term customer relationships.

Harness the power of your customer data to enhance internal communication, reinforce current customer relationships and acquire new business – all in one place.

Integrated CRM Web Portal

Transform Customer Data Into Increased Sales & New Business Revenue

CRMAnywhere interprets all information entered into SAMPro Enterprise in real-time, making it easier for you to capitalize on new opportunities. Virtually eliminating double-entry errors, wireless access gives your sales force the power to take lead tracking to the next level. Seamless integration with custom reporting and analytics provides your management and sales teams unmatched power to create detailed images of your business activity and take advantage of your business acquisition potential.

- Strategically assign new contacts/opportunities to the sales staff best suited for the job
- Track sales management stats, trends and KPIs
- Estimate prospective job value and probability

The Mobility to Manage Leads

- Integrate your scheduled activities & meetings with Google Calender and Microsoft Outlook
- Review sales leads generated by your field reps and customers
- Track the progress of open leads throughout the sales cycle
- Create goal or milestone schedules using custom opportunity templates

Full-Featured Quoting Capabilities

- Create multiple options per quote
- Choose fixed fee, percent markup or gross margin quotes
- Generate quotes for new sales opportunities or existing clients



Mobile Field Software for Service Subcontractors

The SubAnywhere web portal with mobile workforce automation is a convenient single point of contact for coordinating the diverse set of management responsibilities faced by national maintenance organizations (NMOs) and their service subcontractors. Backed by Rules Based Management (RBM) it provides a comprehensive efficiency that is realized by your company, your service subcontractors and your customers.

Whether your company offers services on a local, regional or national level, the SubAnywhere web portal provides real-time, two-way communication with your subcontracted service providers, and the unlimited scalability to collect, store, and organize all of your site records, documents and contracts. SubAnywhere works to drive revenue, increase customer satisfaction, and maintain long-term, profitable relationships with high-quality contractors throughout your service area.



Seamless, Two-Way Communication with Service Subcontractors

Service subcontractor management has never been easier. With the added power of SubAnywhere's dedicated mobile app, a subcontractor's technician can communicate from the field to your back office as efficiently as if they were your own technicians. Service subcontractors can easily log in to SubAnywhere to update work order status, capture equipment metrics and images, and access pertinent records and documents.

Service Subcontractor Management

The SubAnywhere Web-Portal

Our wireless and web-based technology work together to take business communication between your company, your clients and your service subcontractors to the next level. Using any web-enabled wireless device or PC, SubAnywhere eliminates correspondence issues over extended service areas by providing a direct and secure line of communication for an unlimited number of service subs and work orders. With the added ability to incorporate your subcontractors' local scheduling with your own, SubAnywhere can phase out paperwork inefficiencies, billing delays, and greatly reduce turnaround times.

Your business reputation depends on the ability to provide fast and efficient service. Addressing a full spectrum of communication and data-management functions, SubAnywhere not only collects and protects your business data, but also works to secure and support lasting, mutually-profitable relationships with the best service subcontractors in your local, regional or national market.

- **Interface seamlessly with SAMPro's service management and integrated accounting software, eliminating cross-platform integration issues**
- **Optimize day-to-day operations by reducing the load on service coordinators and dispatchers**
- **Receive real-time subcontractor check-in / check-out updates**
- **Receive active notification via email or text when subcontractors aren't performing as planned**
- **Capture charges that flow to billing and A/P**

SubAnywhere's Dedicated Mobile Technician App

Data-Basics' SubAnywhere mobile tech software works in perfect harmony with the SubAnywhere web portal and provides service subcontractors with wireless access to service information directly from the field.

For national maintenance organizations or other specialized service industries, SubAnywhere helps reduce costs, streamline processes, and increase productivity by giving you the control to securely regulate two-way data flow with on-site, subcontracted technicians – and more – from virtually anywhere.



Software Solutions Since 1974

Thank you for your interest in SAMPro Enterprise Software Systems. Follow the links below to learn more about Data Basics, Inc. and SAMPro Enterprise ERP software systems at www.DataBasics.com.

[Field Service Software](#)

[Construction Management Software](#)

[Enterprise Accounting](#)

[Inventory & Procurement](#)

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Data-Basics authors integrated service management, facilities management, job costing, accounting, and field service software. For more than forty years, thousands of users have relied on our software solutions from a wide range of industries including: HVAC • Facilities Management • Speciality Contracting • Mechanical Contracting • Construction • Retail Maintenance • Telecom • Plumbing • Food Service • National Maintenance Organizations (NMO) • And many more!

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