



ServiceLink Direct Software overview

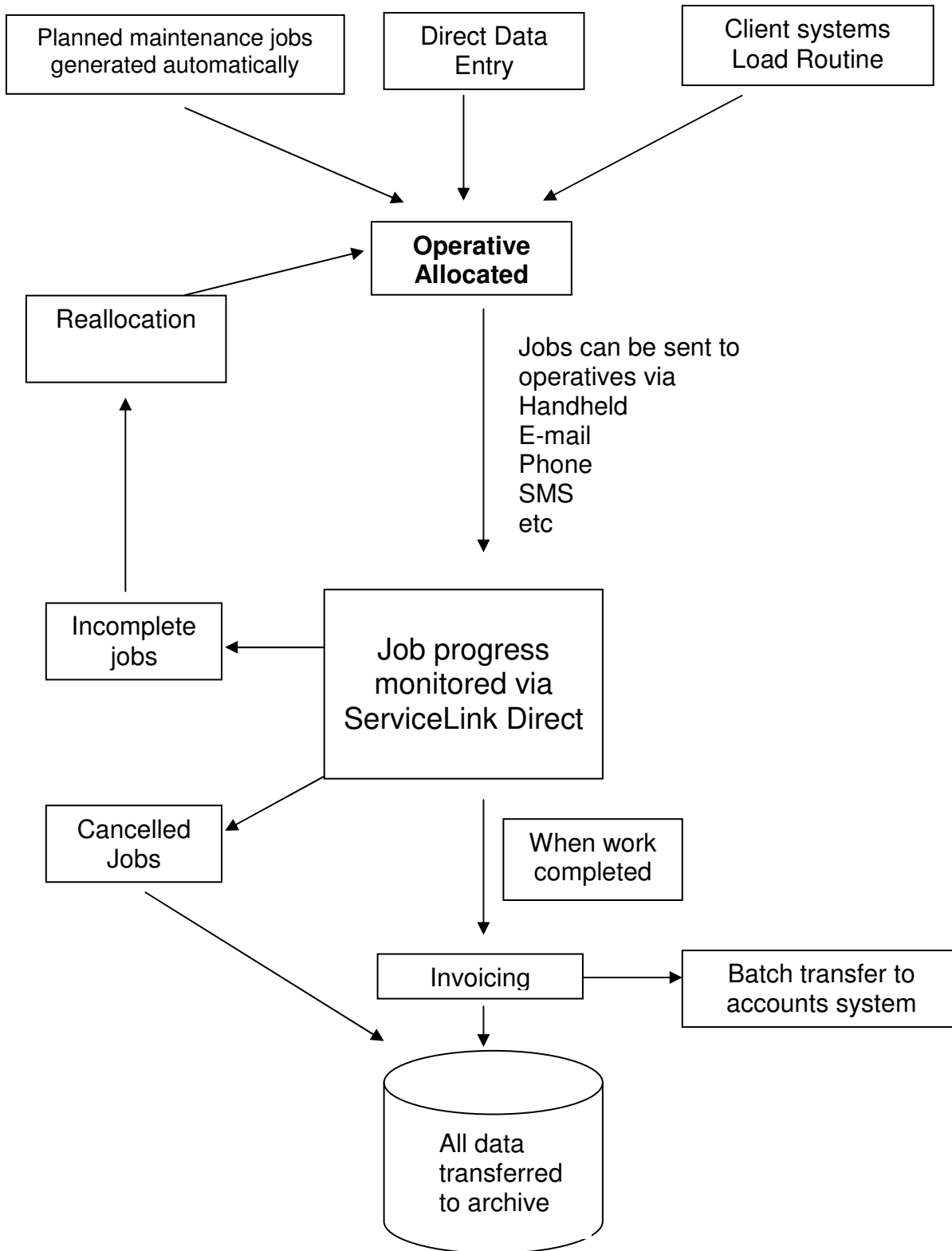


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ServiceLink Direct Processes





Overview

ServiceLink Direct is a system designed to handle the requirements of organisations that have a number of mobile operatives (usually including subcontractors).

There is a diagram on the next page to illustrate the overall flow of work.

The processes involved start with

1. A phone call to the contractor to request work to be carried out.
2. An electronic request e.g. a fax
3. A transfer of data from a client computer system identifying work to be done
4. The system can generate planned maintenance jobs automatically on a repetitive basis.

Operatives are then instructed to carry out the work, through a variety of possible methods

1. Operatives can have jobs sent to handheld devices
2. Operatives are given printed / faxed instruction
3. SMS messages can be sent

ServiceLink Direct is used to manage the work in progress, allowing office staff to see what jobs are running late etc. The system is designed to ensure that all jobs remain in management view until completed.

When work is completed ServiceLink Direct can be used to raise invoices. Invoicing can be based on a mixture of SOR billing, Time & materials, fixed price etc. The invoices raised are then posted to a sales ledger in batch mode.

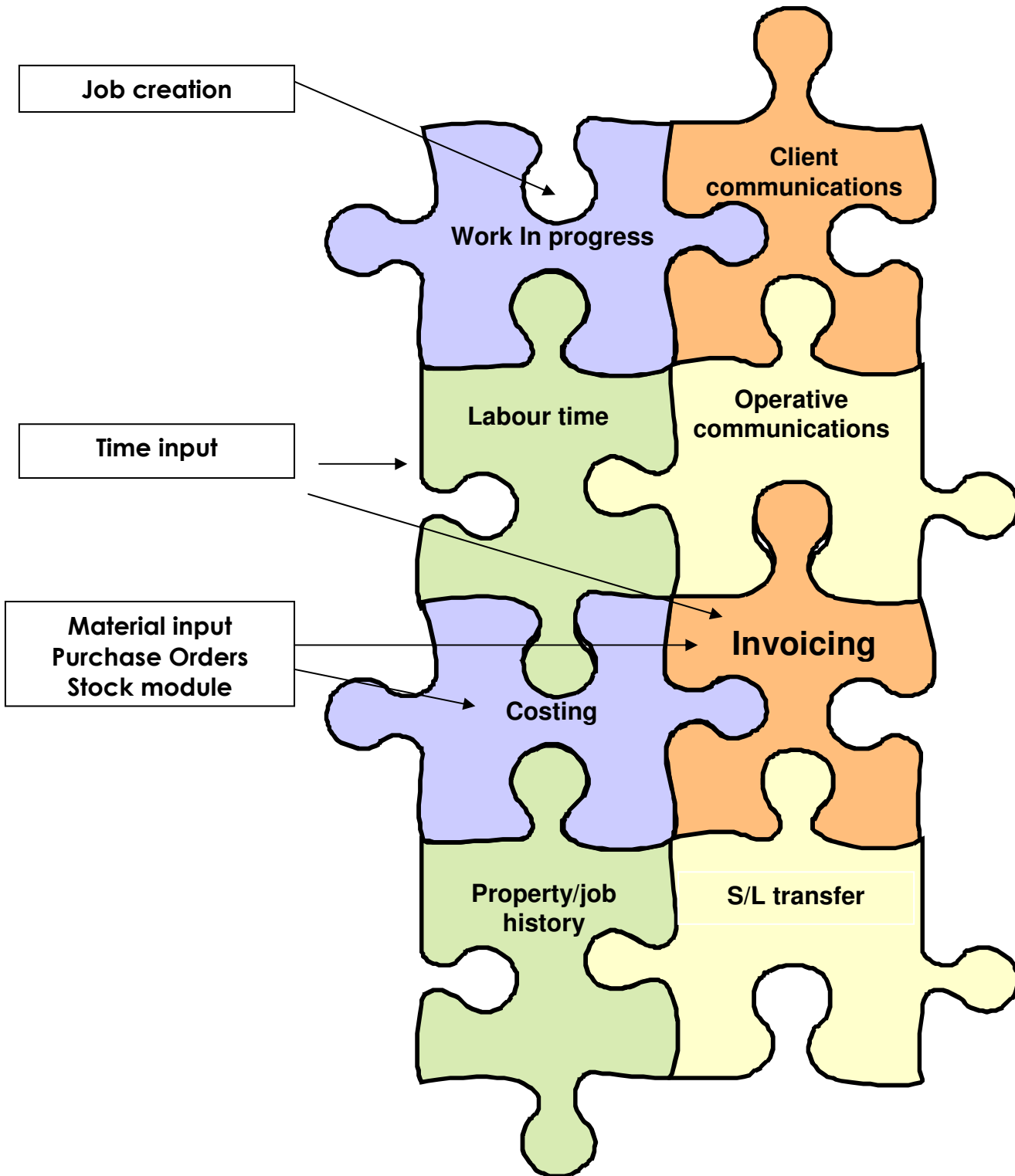
When the work is complete and the job has been invoiced, all of the data about a job is transferred to archive. This data is still readily available to users, but is kept separate from live jobs, thus users can readily see in the live jobs section the work needing done, while having a complete history of all work done at any given location. The Archived data can be stored indefinitely in the system.

There are various modules that can be used in ServiceLink Direct e.g. Purchase Orders module, these will be covered in later in this document, the above description is intended to provide the overall scope of the job cycle handled with ServiceLink Direct.



Service Pro functions

➤ ServiceLink Direct functions diagram



➤ ServiceLink Direct functions – job creation

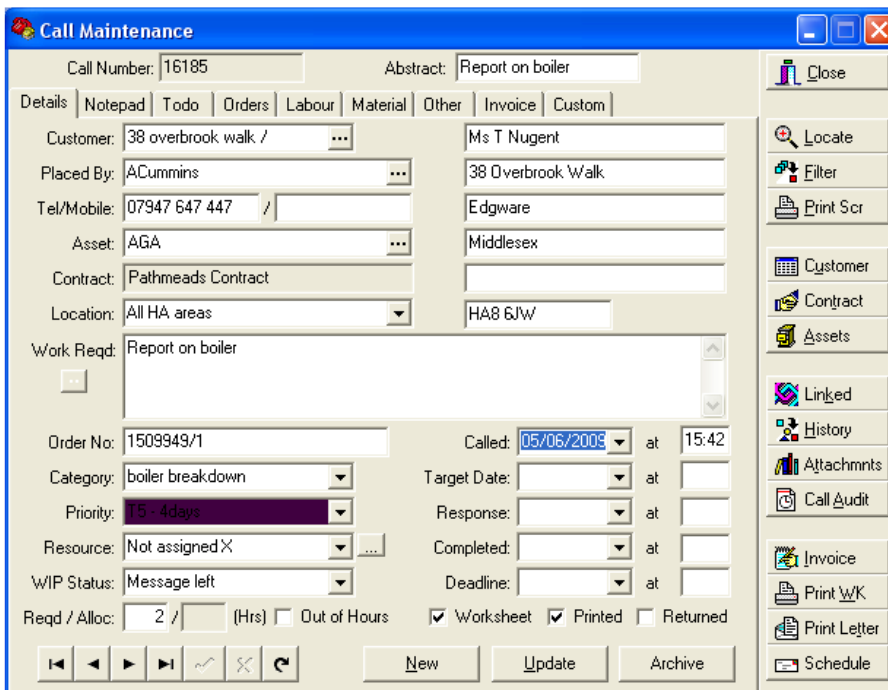
Job Creation methods

1. **Computer transfer.** Usually FTP of job request details from client systems. A number of interfaces have been implemented sites covering the majority of client systems. These are generally created according to customers needs.
2. **Direct input** – fast and user friendly, designed for input of job while on phone to the person raising the request, and allowing enquiries into job history in the process of logging the call.

If there are any special details about a property e.g. asbestos risk, unusual access details etc, this information will “popup” as soon as the address is identified to alert the user doing the job input.

This screen illustrates the details held on the call details tab, which is where the job details are initially entered.

This information is a mixture of data entered in advance e.g. address, contract, location etc and information entered at the point of capture e.g. work description, date entered etc

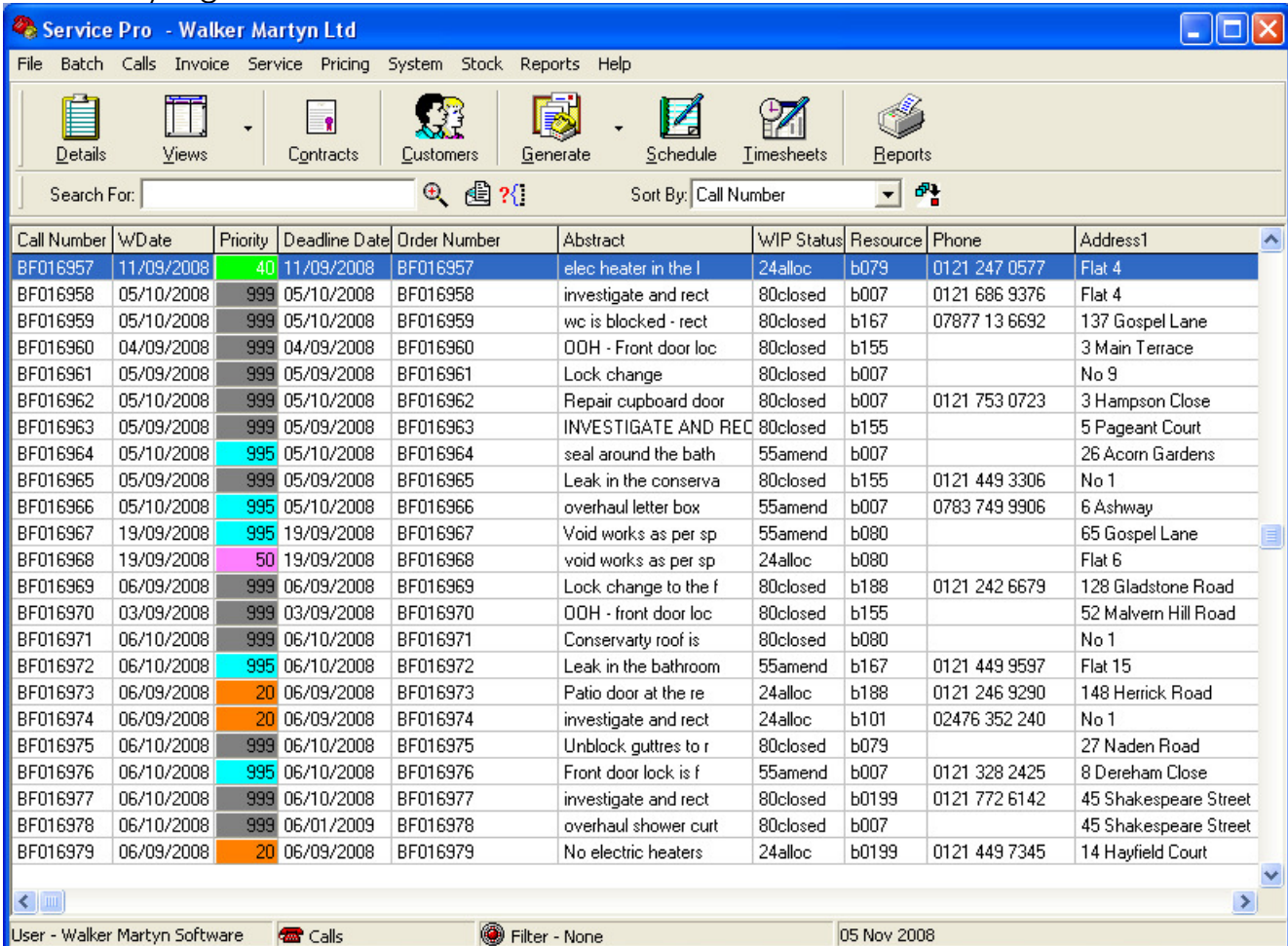


The screenshot shows the 'Call Maintenance' software interface. The window title is 'Call Maintenance'. The main area is divided into several sections:

- Call Information:** Call Number: 16185, Abstract: Report on boiler.
- Details Tab:** Includes fields for Customer (38 overbrook walk / ...), Placed By (ACummins), Tel/Mobile (07947 647 447 /), Asset (AGA), Contract (Pathmeads Contract), Location (All HA areas), Work Reqd (Report on boiler), Order No (1509949/1), Category (boiler breakdown), Priority (T5 - 4days), Resource (Not assigned X), WIP Status (Message left), and Req'd / Alloc (2 / (Hrs) Out of Hours).
- Call Date/Time:** Called: 05/06/2008 at 15:42.
- Call Status:** Target Date, Response, Completed, and Deadline fields.
- Call Actions:** Worksheet, Printed, and Returned checkboxes.
- Navigation:** New, Update, and Archive buttons.
- Right Panel:** A vertical toolbar with icons for Close, Locate, Filter, Print Scr, Customer, Contract, Assets, Linked, History, Attachmnts, Call Audit, Invoice, Print WK, Print Letter, and Schedule.

➤ ServiceLink Direct functions – work in progress

The screen below is the main screen in ServiceLink Direct – it is the first screen users see when they log on.



Call Number	WDate	Priority	Deadline Date	Order Number	Abstract	WIP Status	Resource	Phone	Address1
BF016957	11/09/2008	40	11/09/2008	BF016957	elec heater in the l	24alloc	b079	0121 247 0577	Flat 4
BF016958	05/10/2008	999	05/10/2008	BF016958	investigate and rect	80closed	b007	0121 686 9376	Flat 4
BF016959	05/10/2008	999	05/10/2008	BF016959	wc is blocked - rect	80closed	b167	07877 13 6692	137 Gospel Lane
BF016960	04/09/2008	999	04/09/2008	BF016960	OOH - Front door loc	80closed	b155		3 Main Terrace
BF016961	05/09/2008	999	05/09/2008	BF016961	Lock change	80closed	b007		No 9
BF016962	05/10/2008	999	05/10/2008	BF016962	Repair cupboard door	80closed	b007	0121 753 0723	3 Hampson Close
BF016963	05/09/2008	999	05/09/2008	BF016963	INVESTIGATE AND REC	80closed	b155		5 Pageant Court
BF016964	05/10/2008	995	05/10/2008	BF016964	seal around the bath	55amend	b007		26 Acorn Gardens
BF016965	05/09/2008	999	05/09/2008	BF016965	Leak in the conserva	80closed	b155	0121 449 3306	No 1
BF016966	05/10/2008	995	05/10/2008	BF016966	overhaul letter box	55amend	b007	0783 749 9906	6 Ashway
BF016967	19/09/2008	995	19/09/2008	BF016967	Void works as per sp	55amend	b080		65 Gospel Lane
BF016968	19/09/2008	50	19/09/2008	BF016968	void works as per sp	24alloc	b080		Flat 6
BF016969	06/09/2008	999	06/09/2008	BF016969	Lock change to the f	80closed	b188	0121 242 6679	128 Gladstone Road
BF016970	03/09/2008	999	03/09/2008	BF016970	OOH - front door loc	80closed	b155		52 Malvern Hill Road
BF016971	06/10/2008	999	06/10/2008	BF016971	Conservarty roof is	80closed	b080		No 1
BF016972	06/10/2008	995	06/10/2008	BF016972	Leak in the bathroom	55amend	b167	0121 449 9597	Flat 15
BF016973	06/09/2008	20	06/09/2008	BF016973	Patio door at the re	24alloc	b188	0121 246 9290	148 Herrick Road
BF016974	06/09/2008	20	06/09/2008	BF016974	investigate and rect	24alloc	b101	02476 352 240	No 1
BF016975	06/10/2008	999	06/10/2008	BF016975	Unblock guttres to r	80closed	b079		27 Naden Road
BF016976	06/10/2008	995	06/10/2008	BF016976	Front door lock is f	55amend	b007	0121 328 2425	8 Dereham Close
BF016977	06/10/2008	999	06/10/2008	BF016977	investigate and rect	80closed	b0199	0121 772 6142	45 Shakespeare Street
BF016978	06/10/2008	999	06/01/2009	BF016978	overhaul shower curt	80closed	b007		45 Shakespeare Street
BF016979	06/09/2008	20	06/09/2008	BF016979	No electric heaters	24alloc	b0199	0121 449 7345	14 Hayfield Court

There are features facilitating

- Alerting users to jobs with problems e.g. the coloured column indicates the job priority. There is an automatic job escalation routine that escalates jobs from one priority to another based on rules created during system setup. System administrators can alter these rules at any time.
- Allowing users to find any job quickly and easily, the search method can be based on any item of information, e.g. job number, order number, address, job description etc
- Allowing users to select a group of jobs to work with, based on. job number , order number , address , job description etc

➤ **ServiceLink Direct functions – client communications**

Data from clients

1. Lists of static data

There are facilities to allow lists of static data such as addresses, to be loaded.

2. Job creation

Importing from client systems, usually by FTP, new job requests. There are a number of import routines that have been created for various packages. New interfaces are being created every year.

Data to clients

Client systems can be updated as job status's change, or simply when the job is completed. This is usually by FTP batched transfer.

Reporting to clients is handled in the reporting methods section, but in general terms client reporting is mainly electronic – spreadsheets, PDF's etc sent by email.

➤ **ServiceLink Direct functions – operative communications**

The traditional methods of getting work instructions to operatives are possible including

- Hardcopy
- Fax
- Phone

In addition there are electronic options available

1. **Email.** This is obviously limited to one-way data transfer, but is simple to set up and is an automatic “background” function.
2. **SMS** This is available, but generally not suitable in a ServiceLink Direct environment as there is usually a lot of data e.g. address, access, problem description, office comments etc and multiple SMS's are not entirely satisfactory. Its use in ServiceLink Direct is in conjunction with handheld devices should the office wish to alert the operative that an urgent change of plan has happened.

3. **Handheld computers**

Jobs details can be sent to engineers automatically, using a handheld device . The engineer then completes details of work done, time taken, parts used etc This information is sent back to the system via mobile phone and updated into the ServiceLink Direct database. Thus the administration staff can be kept up to date with work done, time taken etc.

The engineer will receive details of a new job showing

- Job number
- Address
- Contact
- Description of work required
- Date job scheduled to be done
- Customer order number
- Comments

This information is displayed on a form on the handheld screen. The engineer cannot change any of that information, but adds data to fields as indicated below.

Any number of jobs can be sent at any time, the office control what jobs they want to send.

The system collects the data entered by the engineer. This can apply to any number of jobs. If the operative has been accumulating data (e.g. phone out of action) then the data is updated when communications are re-established.

Information collected from the handheld includes

- Job Completed / not completed
- Time arrived on site
- Time left site
- Chargeable time on site
- Work carried out
- Description of further work required
- Materials used
- Additional Materials to be ordered
- Customer signature

SPECIALISED REQUIREMENTS

Custom built requirements will be priced after initial discussion and specification

➤ ServiceLink Direct functions – Purchase Orders

The Purchase Orders module is an easy to use method for raising PO's.

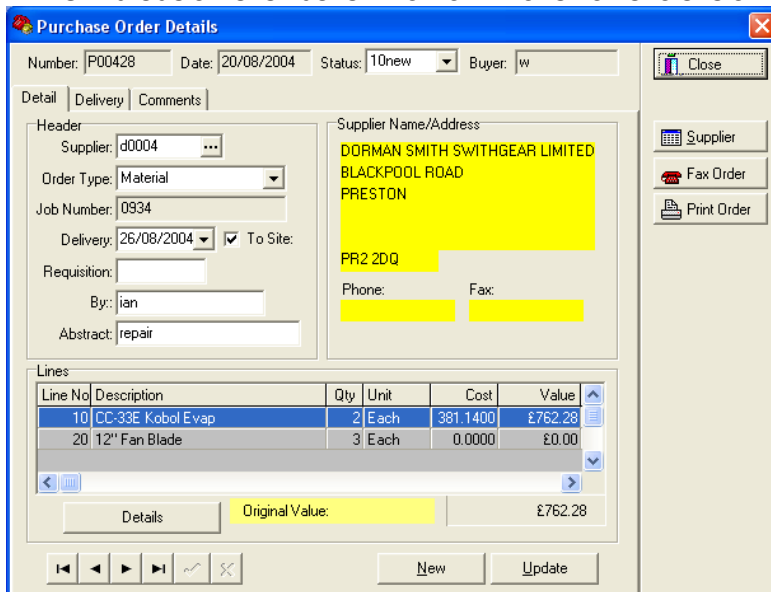
A PO can only be raised from within a job, this ensures that each purchase order is associated with a job and cannot be raised with no associated job to incur costs.

It links with the supplier information to fill in supplier details and caters for ordering standard stock items and also one-off non-stock items.

The Purchase Order module allows orders to be created printed / faxed and the materials ordered to be applied to the job for costing and charging.

Purchase Orders are linked to jobs so that it is possible to see which job a purchase order is for, and when looking at job details it is possible to see which purchase orders have been raised for that job

The details of materials ordered can be transferred to the job materials very simply, which is used to ensure that all material ordered for a job are invoiced and costed.



Purchase Order Details

Number: P00428 Date: 20/08/2004 Status: 10new Buyer: w

Detail Delivery Comments

Header

Supplier: d0004

Order Type: Material

Job Number: 0934

Delivery: 26/08/2004 To Site:

Requisition:

By: ian

Abstract: repair

Supplier Name/Address:

DORMAN SMITH SWITHGEAR LIMITED
BLACKPOOL ROAD
PRESTON
PR2 2DQ

Phone: Fax:

Supplier Fax Order Print Order

Line No	Description	Qty	Unit	Cost	Value
10	CC-33E Kobil Evap	2	Each	381.1400	£762.28
20	12" Fan Blade	3	Each	0.0000	£0.00

Original Value: £762.28

New Update

PURCHASE ORDER INPUT

The raising of purchase orders is straightforward and uses information set up in advance. Supplier details are maintained by the system and used for purchase orders. Product details can be set up in the product table and accessed for purchase orders.

PURCHASE ORDER PRINTING

Purchase Orders can be printed on plain paper or faxed directly to the supplier. Note that the fax facility requires the network to have a network facility fax installed

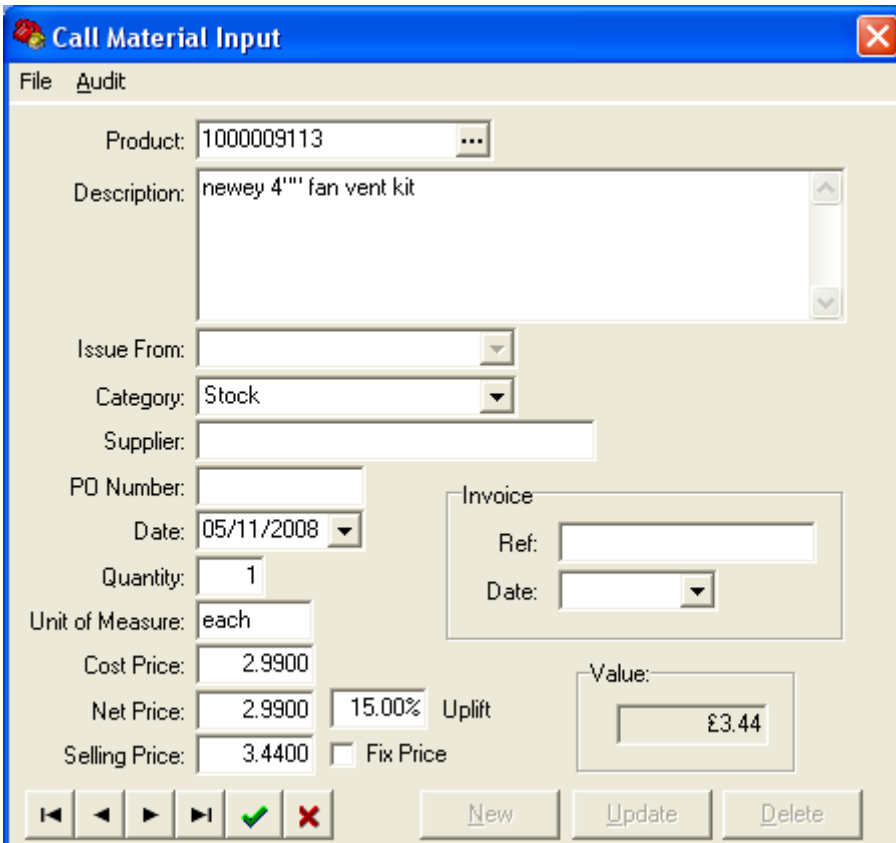
➤ ServiceLink Direct functions – Direct material input

It is possible to see on the “call details material tab” all of the material that has been used on any job. This data provides a means for costing and charging material.

In addition to material input from Purchase Orders and the handheld devices, it is possible to enter materials used directly.

From the main call details screen, the “materials tab” provides simple quick access to the materials used on a job.

The detail of materials used is firstly shown in a list, from which the user can select any item to display the detail shown below.



This information is stored indefinitely so that it is possible to see what materials were used on any job in the past, supplier name, PO number etc.

There is no limit to the number of material items that can be held for any job.

➤ **ServiceLink Direct functions – Stock module**

OVERVIEW

The stock module is designed for Multi location.

This module is intended to provide facilities to monitor stock in a number of locations (e.g. vans, spares on customer premises etc.)

The general flow of the system is that goods are receipted into a stock location, and then issued to a job from that location.

Items issued from a stock location to a job are added to the list of materials used on the job details.

Stock can be transferred from one location to another.
Transactions are posted in batches for control purposes.

REPORTS include

STOCKHOLDING BY LOCATION

This report provides a list of stock balances at any location, intended primarily for stock checking purposes.

TRANSACTION LIST

Shows stock movements as an audit trail by batch input

STOCK VALUATION REPORT

Provides a valuation for a range of products and a range of locations

STOCK MOVEMENT BY LOCATION

Provides a history of stock movements in each location.

STOCK BELOW REORDER

Provides a means of generating a list of items that are running low and should be ordered. This report runs by location.

ENQUIRY

There is an enquiry facility that will show the locations where a stock item is used and the stock balance at that location.

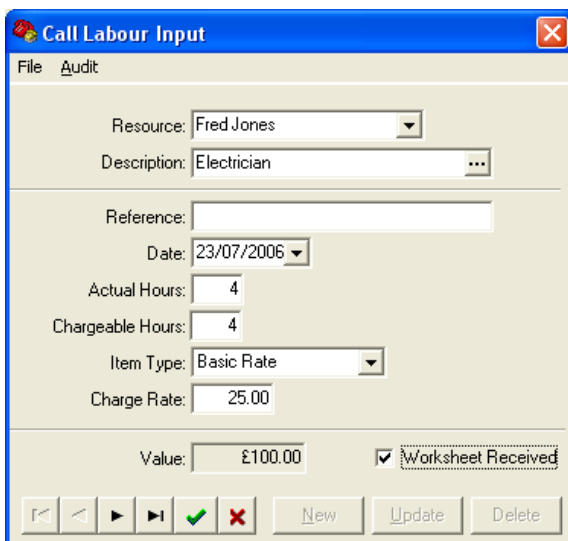
This provides a quick method of tracking down an item that is in short supply.

➤ ServiceLink Direct functions – Labour time input

It is possible to see on the “call details labour tab” all of the labour that has been used on any job. This provides a means for costing and charging labour.

There are a variety of methods of time input

1. Direct input to the call details “labour tab” this is illustrated below.
2. Collection from handhelds
3. Timesheet input, intended for bulk input of time data.



Call Labour Input

File Audit

Resource: Fred Jones

Description: Electrician

Reference:

Date: 23/07/2006

Actual Hours: 4

Chargeable Hours: 4

Item Type: Basic Rate

Charge Rate: 25.00

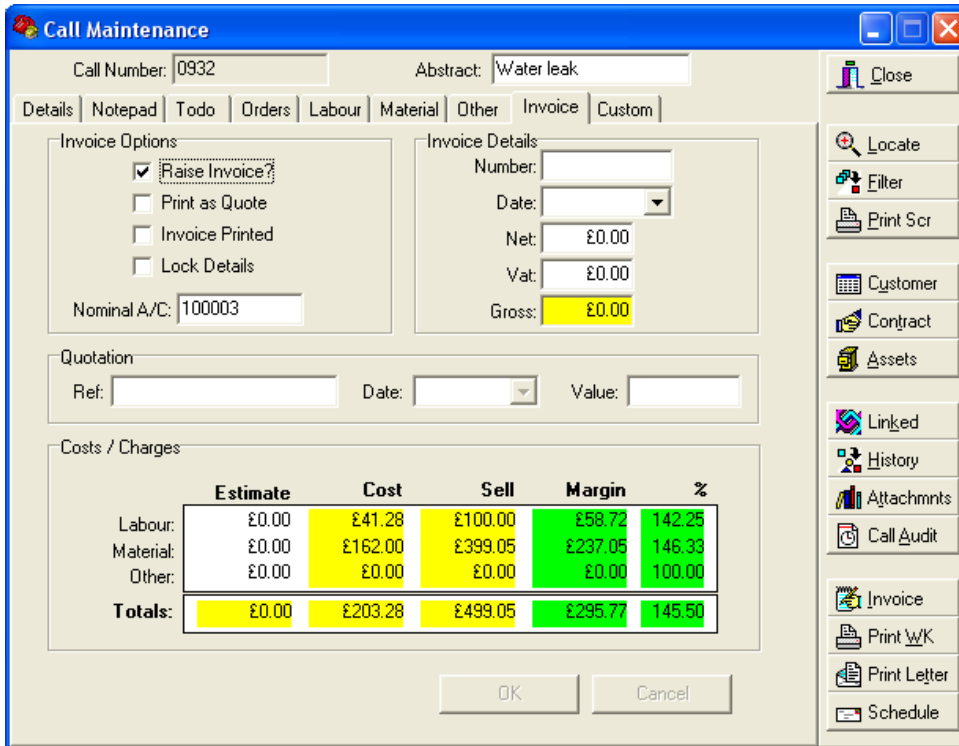
Value: £100.00 Worksheet Received

Navigation: [Back] [Forward] [Check] [X] [New] [Update] [Delete]

This information is stored indefinitely so that it is possible to see who worked on any job in the past, hours worked, dates on site etc.

➤ **ServiceLink Direct functions – Costing**

From the labour and material items entered, it is possible to accumulate job costing data – before the job is invoiced it is possible to see the margin, thus providing a mechanism for seeing jobs with unsatisfactory margins before they are invoiced.



The screenshot shows the 'Call Maintenance' window with the following data:

Call Number: 0932 Abstract: Water leak

Invoice Options: Raise Invoice?, Print as Quote, Invoice Printed, Lock Details. Nominal A/C: 100003

Invoice Details: Number: [], Date: [], Net: £0.00, Vat: £0.00, Gross: £0.00

Quotation: Ref: [], Date: [], Value: []

	Estimate	Cost	Sell	Margin	%
Labour:	£0.00	£41.28	£100.00	£58.72	142.25
Material:	£0.00	£162.00	£399.05	£237.05	146.33
Other:	£0.00	£0.00	£0.00	£0.00	100.00
Totals:	£0.00	£203.28	£499.05	£295.77	145.50

The information related to labour and material cost totals can be reported on in various ways – standard reports, spreadsheet extraction and user defined reports.

The cost information is associated with the rest of the job information e.g. dates, contract, operative etc which means that it is possible to extract cost, revenue and margin analysis using these parameters.

➤ **ServiceLink Direct functions – Invoicing**

OVERVIEW

ServiceLink Direct provides a method to ensure that each job, which should be billed, gets billed. There is a safeguard to prevent jobs being carried out and then archived if they have not been invoiced.

The details of how work on a contract is charged (e.g. time & materials, cost plus, SOR, labour only etc) are held on the contract details. The charge rates for labour are also held on each contract.

Time and materials entered for a job are used to calculate the invoice value to be charged.

Invoice details can be posted to accounting packages that have a data import capability.

SOR FACILITIES

There are facilities in Service Pro that enable SOR type work to be processed and billed.

Multiple schedules can be set up within the system, for any number of clients.

The entry of SOR codes against jobs is fast and straightforward.

INVOICE CALCULATION

If work done is chargeable, the time spent and materials used is built up, from the details entered against each job, and an invoice printed.

Jobs can be

1. Charged on a Time and materials basis.
2. Charged at a fixed price i.e. there was a fixed price quote given for this work.
- 3 Charged on an SOR basis

All jobs stay visible on the main screen until they are invoiced, they can't be "accidentally" archived before they are invoiced.

Invoicing can be done either in batches, or for one specific job at a time.

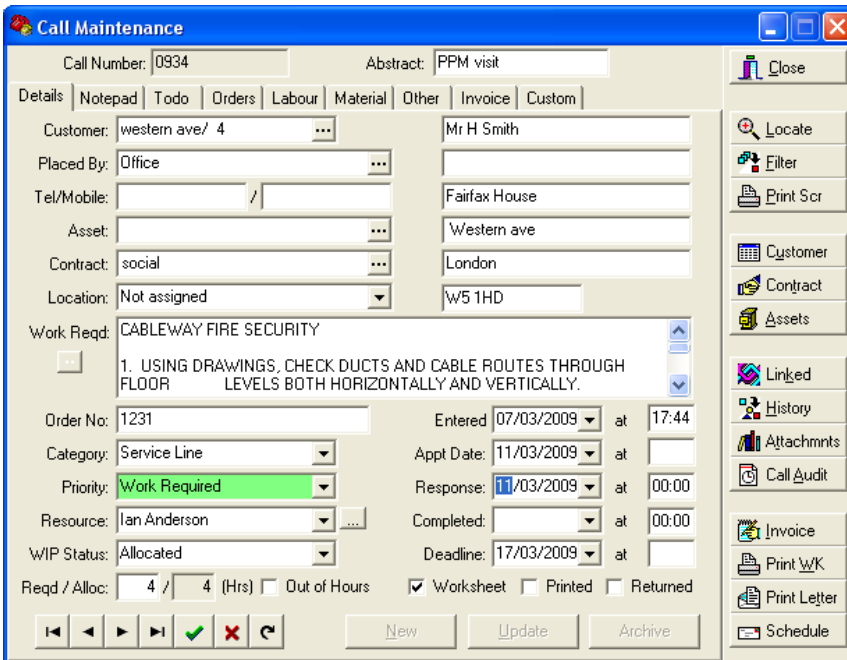
➤ **ServiceLink Direct functions – S/L transfer**

Invoices produced in ServiceLink Direct can be transferred to various sales ledger packages.

Where no interface exists “off the shelf”, Walker Martyn can build one – assuming that the target package has an import capability.

➤ ServiceLink Direct functions – Property / Job History

All job information is stored for later enquiry. The enquiry facilities are located to make them easy to use e.g. from the main call details screen there is a “history” button that will display lists of jobs at that address - both live and archived.



The screenshot shows the 'Call Maintenance' window with the following details:

- Call Number: 0934
- Abstract: PPM visit
- Customer: western ave/ 4
- Placed By: Office
- Tel/Mobile: /
- Asset:
- Contract: social
- Location: Not assigned
- Work Req: CABLEWAY FIRE SECURITY
- Order No: 1231
- Category: Service Line
- Priority: Work Required
- Resource: Ian Anderson
- WIP Status: Allocated
- Reqd / Alloc: 4 / 4 (Hrs)
- Entered: 07/03/2009 at 17:44
- Appt Date: 11/03/2009 at
- Response: 11/03/2009 at 00:00
- Completed: at 00:00
- Deadline: 17/03/2009 at

Additional fields include Mr H Smith, Fairfax House, Western ave, London, and W5 1HD. The 'Work Req' description is: '1. USING DRAWINGS, CHECK DUCTS AND CABLE ROUTES THROUGH FLOOR LEVELS BOTH HORIZONTALLY AND VERTICALLY.'

It is also possible to access history details for any property from the property record itself.

There are enquiry / sorting / filtering facilities available on the “archived jobs” screen which work in an identical fashion to the “live jobs” screen, so that the same methods are used throughout the system to provide user-friendliness.

➤ **ServiceLink Direct functions – generating jobs automatically**

Using information held in the asset register for each property, it is possible to get Planned Maintenance visits generated automatically. The visits can be set for any number of days or months between each visit. As one visit is generated in the live jobs file, the next service visit date is updated according to the interval set for that visit. Different assets on any given site can have either a common schedule or each be individually scheduled.

➤ **ServiceLink Direct functions – reporting**

Besides the standard reports supplied with ServiceLink Direct, there are a number of options available to users –

- The paradox version has an end user report generator which allows users to create their own reports.
- Both databases are ODBC compliant so it is possible to extract data into Excel, WORD etc directly.
- Third Party reporting tools, such as Crystal (Business Objects) can be used – the database is not encrypted.
- The most popular option is data extraction, using a Walker Martyn utility, direct to spreadsheet. This utility allows users to choose a range of parameters to filter out the data records they want to access, and also the fields that they wish to extract into the spreadsheet.
This option is popular because the extraction program is simple to use and the learning curve for Excel is nil – everybody who wants to do management reporting is already familiar with Excel.

➤ **ServiceLink Direct functions – Attachments**

OVERVIEW

The Attachments module allows links to be set up between ServiceLink Direct job records, customer records, contract records, product records and other data within the user computer network. This allows documents associated with a job, a property or a contract to be readily viewed from within the ServiceLink Direct package.

This function is similar to having an attachment to an e-mail.

SCOPE

Links can be established between any mix of

- Jobs
- Products
- Contracts
- Customers
- Assets

And

- Word Processing documents
- Spreadsheets
- Scanned Images e.g. correspondence
- Pictures
- Etc

USAGE

The method of operation of attachments is straightforward. To access attachments for a call, the “attachments” button is used. This then displays the list of attachments, click on the choice and the attachment is displayed.

USES

The use of attachments includes easy access to

- The job estimate held in a spreadsheet
- A WP document such as the quote for the job
- A WP document with the contract details
- Health & Safety information for a particular product
- Scanned correspondence from a customer
- A map of how to get to a site
- A photograph of the site or installation. Photographs taken pre installation and post installation can be stored for easy access from ServiceLink Direct

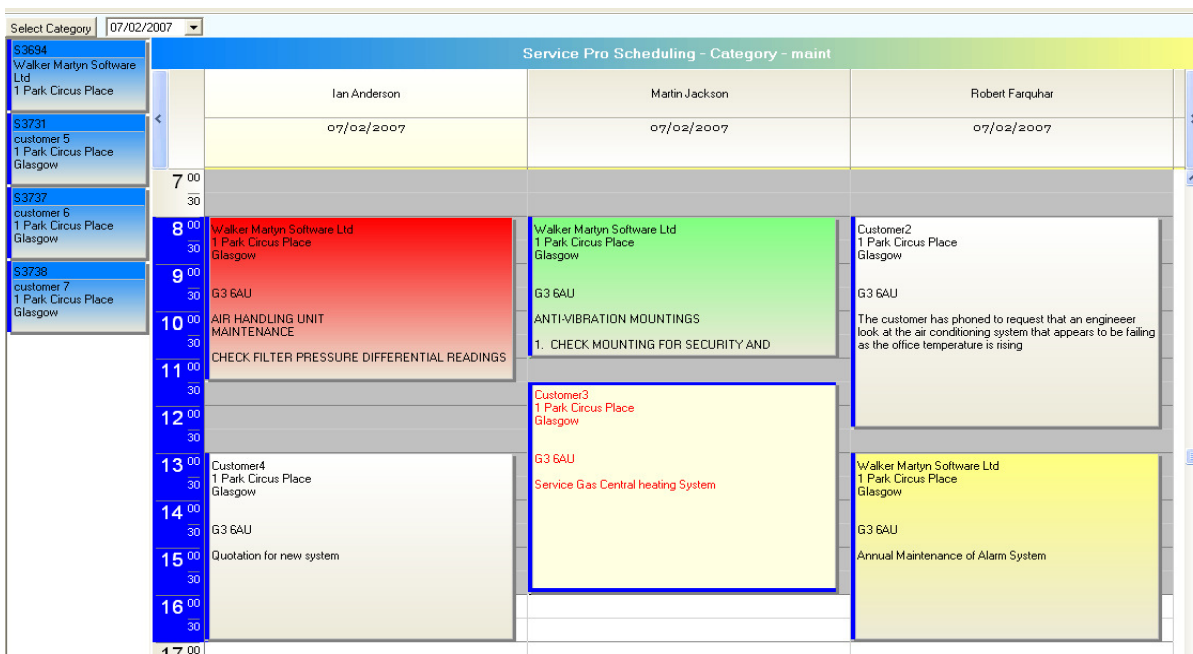
Different companies have different situations, so we offer a choice of ways to schedule work.

➤ **ServiceLink Direct functions – Visual Scheduling**

The latest development on the scheduling front from Walker Martyn is the Visual Scheduling module.

The screen shown below illustrates the “one day in detail” view. This shows all (or a selected group) of operatives in detail – the jobs that they are scheduled to do each day, and the “block “ of time allocated for that job.

Incomplete jobs in the list on the left are simply “dragged and dropped” on to person / time part of the screen in order to allocate.

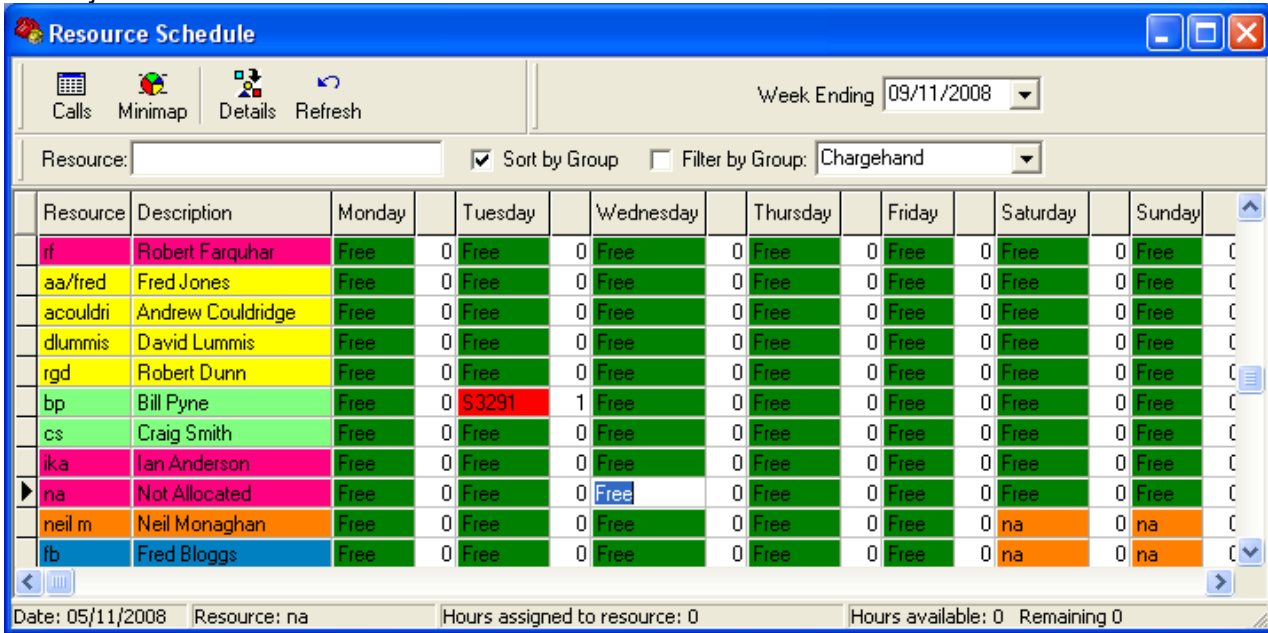


There are other views of the scheduled work that show

- All operatives over any month - this shows the general level of commitment
- One operative over the next week – this is useful for example, to see the impact of an operative being off ill
- One operative over any month – to show when an individual operative will next be available.

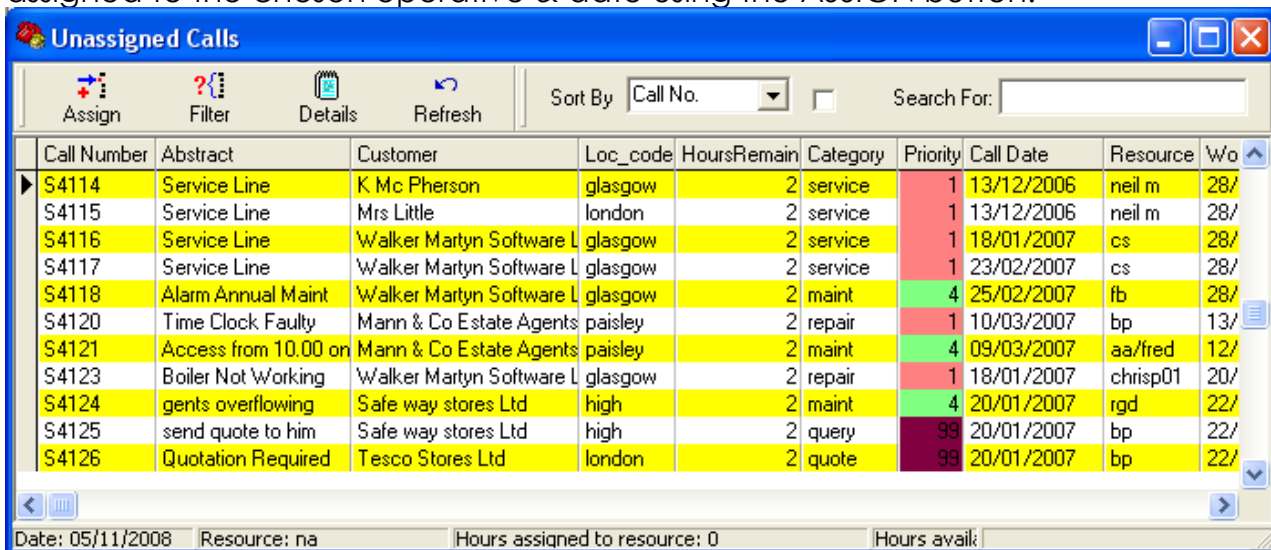
➤ ServiceLink Direct functions – Advanced Scheduling

This option allows users to see a weeks worth of scheduled work. It shows all operatives (called resources within ServiceLink Direct) on the LHS. The other axis of the grid is days of the week. It is thus possible to see what time has been scheduled over a range of operatives and a range of days. By double clicking on any entry in the grid it is possible to “drill down” to see job details.



Resource	Description	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
rf	Robert Farquhar	Free	Free	Free	Free	Free	Free	Free
aa/fred	Fred Jones	Free	Free	Free	Free	Free	Free	Free
acouldri	Andrew Couldridge	Free	Free	Free	Free	Free	Free	Free
dlummis	David Lummis	Free	Free	Free	Free	Free	Free	Free
rgd	Robert Dunn	Free	Free	Free	Free	Free	Free	Free
bp	Bill Pyne	Free	\$3291	1	Free	Free	Free	Free
cs	Craig Smith	Free	Free	Free	Free	Free	Free	Free
ika	Ian Anderson	Free	Free	Free	Free	Free	Free	Free
na	Not Allocated	Free	Free	Free	Free	Free	Free	Free
neil m	Neil Monaghan	Free	Free	Free	Free	Free	na	na
fb	Fred Bloggs	Free	Free	Free	Free	Free	na	na

The above screen is used in conjunction with the screen shown below which allows all the jobs which have not been scheduled to be sorted by date, location etc and then assigned to the chosen operative & date using the ASSIGN button.



Call Number	Abstract	Customer	Loc_code	HoursRemain	Category	Priority	Call Date	Resource	Wo
S4114	Service Line	K Mc Pherson	glasgow	2	service	1	13/12/2006	neil m	28/
S4115	Service Line	Mrs Little	london	2	service	1	13/12/2006	neil m	28/
S4116	Service Line	Walker Martyn Software L	glasgow	2	service	1	18/01/2007	cs	28/
S4117	Service Line	Walker Martyn Software L	glasgow	2	service	1	23/02/2007	cs	28/
S4118	Alarm Annual Maint	Walker Martyn Software L	glasgow	2	maint	4	25/02/2007	fb	28/
S4120	Time Clock Faulty	Mann & Co Estate Agents	paisley	2	repair	1	10/03/2007	bp	13/
S4121	Access from 10.00 on	Mann & Co Estate Agents	paisley	2	maint	4	09/03/2007	aa/fred	12/
S4123	Boiler Not Working	Walker Martyn Software L	glasgow	2	repair	1	18/01/2007	chrisp01	20/
S4124	gents overflowing	Safe way stores Ltd	high	2	maint	4	20/01/2007	rgd	22/
S4125	send quote to him	Safe way stores Ltd	high	2	query	99	20/01/2007	bp	22/
S4126	Quotation Required	Tesco Stores Ltd	london	2	quote	99	20/01/2007	bp	22/

Security

Users have to log on with a password.

The logon is associated with a security group, and different security groups have access to different functions within ServiceLink Direct.

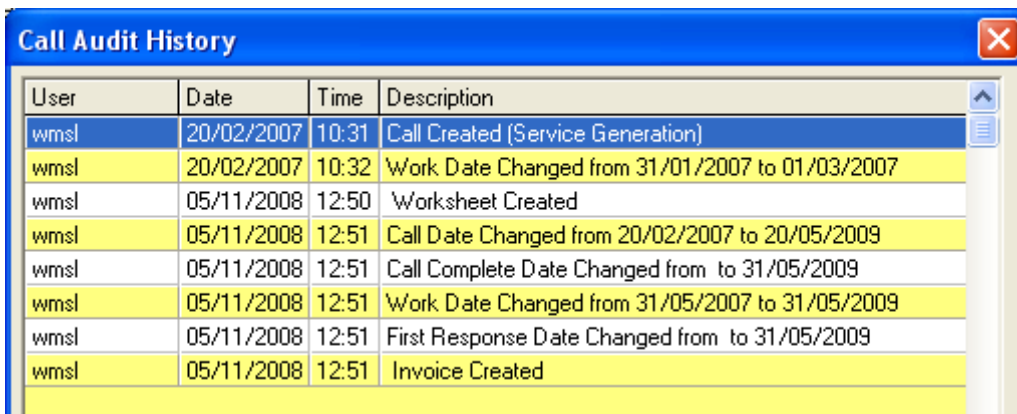
Individual users can also have data restrictions set up e.g. they only view one contract at a time, or they only view with a given WIP status such as “jobs that are ready for invoicing”. The data restriction is very flexible - there can be multiple constraint ranges applied.

AUDIT TRAIL

AUTOMATIC AUDITING

The logon ID is used to provide an audit trail of “who made what changes and when”.

This screen illustrates the audit available for any call.



User	Date	Time	Description
wmsl	20/02/2007	10:31	Call Created (Service Generation)
wmsl	20/02/2007	10:32	Work Date Changed from 31/01/2007 to 01/03/2007
wmsl	05/11/2008	12:50	Worksheet Created
wmsl	05/11/2008	12:51	Call Date Changed from 20/02/2007 to 20/05/2009
wmsl	05/11/2008	12:51	Call Complete Date Changed from to 31/05/2009
wmsl	05/11/2008	12:51	Work Date Changed from 31/05/2007 to 31/05/2009
wmsl	05/11/2008	12:51	First Response Date Changed from to 31/05/2009
wmsl	05/11/2008	12:51	Invoice Created

There is a similar audit trail for individual items within labour and materials.

USER CREATED ENTRIES

Users can enter their own items into a “user notepad” within each job. These entries are timestamped and the users ID entered automatically, and set so that the data entered is read only. This provides a method for individual users to record information e.g.

“phoned and made an appointment for the operative to be on site”

This information is then unambiguously shown as “entered on a specific date and time by a specific user”.

Walker Martyn support

Account Management

Every Walker Martyn customer has a director as a designated management contact.

In addition project managers may be used for specific projects or part of projects for a particular customer.

Ultimate responsibility rests with the customer director. This involvement by the Directors with customers is one reason why we have been successful for more than twenty years. The account manager not only has great experience in IT, business and management, but also has the capability of obtaining the necessary resource to solve any problems that arise.

Project Management

We have used a number of project management tools over the years. These may have been suggested by the Customer or Walker Martyn.

We have used both packages and manual methods.

We use our own internal systems based on Psylvestris for our end of the project, or for more complex projects we may use MS Project and Psylvestris together. We are happy to use appropriate tools by agreement with individual customers for individual projects.

All projects will have regular meetings, with published agendas, and action items with dates.

We have devised standard templates and procedures over the years, which we have used successfully to manage the many projects we have installed.

Complaints and conflict resolution

To be agreed in detail but with the following observations: -

- Complaints and queries can be logged via Psylvestris at any time, and will escalate according to SLA's automatically
- Psylvestris will record all activity entered throughout the life cycle of the system(s).
- Standard Service level Agreements are in place for all categories of Call and Change Request placed on Walker Martyn and third party Software and services.
- These are detailed in the User Manual provided when users are given access to the Psylvestris on the web system.
- Conflict resolution procedures to be defined for each potential conflict area, where these are not addressed in standard service levels.

Walker Martyn Support Services

As part of the post installation support, Walker Martyn offer the following services

Telephone Support – Help Desk

For all working days, users with valid support contracts can call the telephone help desk during standard working hours. Users have unlimited access to this service. There is a growing usage of email reporting for non-urgent support request, users use phone or email according to their own preference.

Internet Support

Walker Martyn have been using the Internet for customer support services for a number of years. We have developed and sell a support package called Psylvestris. This is used by many software houses and resellers as well as end users. We use Psylvestris internally and provide Internet access to users through our own web site. We have developed our own entire infrastructure linking our systems to the Internet, and hence can offer real expertise to users wishing to proceed down a similar route.

There are two areas of the web site

- PSYLVESTRIS on the WEB (POW) and
- A SECURE area

Psylvestris on the Web

This is used by users to

- log calls
- Log change requests (bugs and /or enhancements)
- Enquire on Call status
- Enquire on Change Request status
- Add email comments to Calls
- Add email comments to Change Requests
- Do Knowledgebase searches
- Run reports

This service is accessed via the POW (Psylvestris on the Web) button on our entry screen or via Users/POW on the home page of the main site

Fault fixing

Users with standard package products belonging to Walker Martyn may get bug fixing as part of the support services. This is detailed in the support schedule for the customer contract.

Users who have custom software developed under a Software Development Agreement, (as part of a System/Services Agreement) also may have a fault fixing service. Walker Martyn will fix faults under warranty free of charge.

Any faults found outside of the warranty will be covered by the terms of the support contract.

All faults are reported via the Internet or via normal processes result in the creation of a change request on our internal Psylvestris system.

All change requests are automatically acknowledged upon receipt, and a closure letter is also sent automatically when any change request is closed. This could be either when the fault is fixed or the enhancement has been completed or closed.

Different service levels apply, dependent on the product, the nature and severity of the fault and the type of service the customer has taken.

Enhancements

Enhancements will be done through our standard procedures using the Change Request process.

Remote Access

Walker Martyn normally use Remote Access technology to allow our support and development staff to solve and correct problems from our offices in Glasgow.

We use a number of tools including Remote Access, Remote Control and have set up Virtual Private Networks (VPN) to some customers who have critical systems.

APPENDICES

Overview of ServiceLink Direct interfaces to client systems.

ServiceLink Direct can be interfaced to client systems, however , as there is no “industry standard” interface each client package interface has a different software specification.

The general method used is CSV (or more recently XML) files transferred automatically between the client and contractor systems using FTP.

INTERFACING REPAIR DATA

Walker Martyn has developed interfaces for these packages, amongst others,

- OHMS
- SX3
- IBS
- Universal Housing
- Comino INHOUSE
- Academy

The number of interfaces that have been developed continues to grow as this is an area of great benefit to both client and contractor. Walker Martyn are continually adding to the list of interfaces , both to repair management systems and accounting systems.

The scope of an interface to a client system can vary from

1. New jobs registered on the client system are transferred to the contractors system i.e. simple job creation, with the option of importing SOR codes with the job data.
2. New jobs registered on the client system are transferred to the contractors system Job progress updates are sent to the client system, ending in the “job complete” notification. Invoice data is then sent to the accounts package.

There is also the possibility of the contractor taking the calls direct from tenants and ServiceLink Direct then sending “new job” data to the client system.

INTERFACING ACCOUNTS DATA

Transfer of invoice data is, again, specific to the target package and a number of interfaces to accounting systems have been developed.

GENERAL PURPOSE DATA LOAD ROUTINES

In addition to specific interfaces, there is a general purpose load routine within the package. This is configurable by end users to provide a method of importing data into the ServiceLink Direct package.

This can take data from XLS (spreadsheet) or XML files and load the data into the appropriate table. This is generally used for one off data loads / updates e.g. if a client provides a property register, this can be used to create the property records within ServiceLink Direct.

GENERAL PURPOSE EXPORT ROUTINE

There is a utility that will export job data from the ServiceLink Direct package to XLS (spreadsheet). The method is suitable for end users creating both one off and regular repeat reports.

This can be used for creating client reports in form suitable for emailing to, and electronic storage by, the client.

SPECIALIST INTERFACES

In conjunction with a software supplier of a document management system, Walker Martyn developed an interface whereby the clients faxed the repair orders to the contractor and the contractor's system then processed these faxes electronically to create jobs in ServiceLink Direct.

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