

SERVICELINK DIRECT – JOB MANAGEMENT

ServiceLink provides facilities for creating and managing jobs.

The main ServiceLink screen is a complete list of all jobs that have not been completely processed – no job gets forgotten. Jobs can't be moved off the list of active jobs into the archived jobs "by accident".

ServiceLink has facilities for jobs to be entered (reactive work) and also the system will create jobs automatically for planned maintenance.

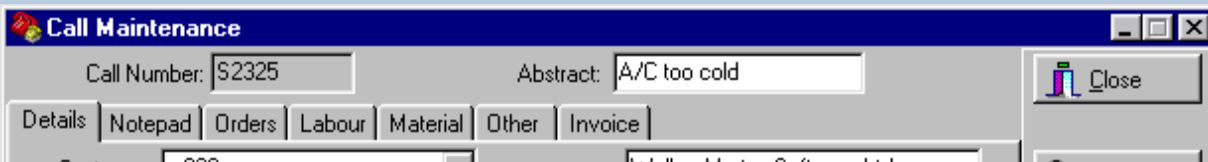
JOB CREATION

Entering details of a job can be done quickly enough to be practical while the customer is on the phone. There are search facilities that allow customer details to be located quickly, and if a customer does not already exist in the system they can be readily added.

There are lookup facilities that exist as options in the job entering process, so that any comments about a customer can be quickly referred to.

JOB CONTROL

Each job has a selection of tabs available that show the detail of Labour, material, purchase Orders invoice raised etc.



ServiceLink actively monitors each job to provide warning if jobs are running over the timescales that you have defined for them.

The automatic escalation gives warning if jobs are

- i. In a given status too long e.g. awaiting materials for more than one week.
- ii. Running beyond the limits agreed with the customer e.g. the job has not been completed after a week.
- iii. Running late e.g. a monthly service is overdue by two days.

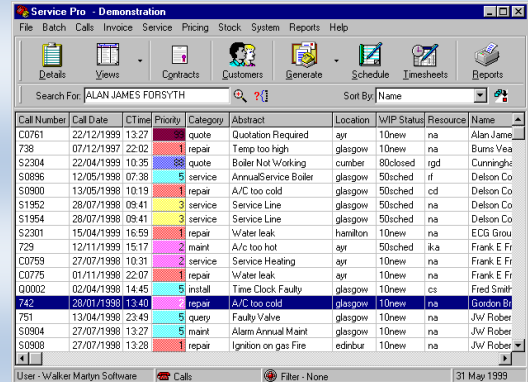
This facility can be extended to cover situations such as "quote to be followed up", "job completed but not billed after one month" etc.

JOB PROCESSING

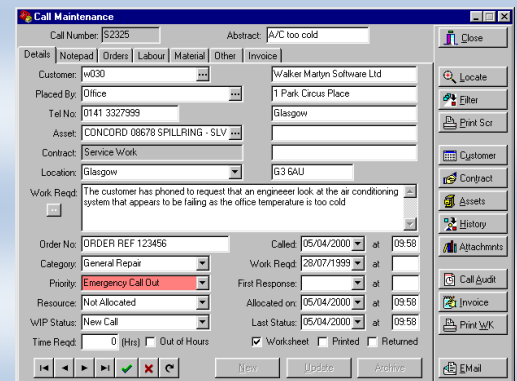
As a job progresses the details of time and materials used can be recorded – this will be used for costing and invoicing later on in the process.

At each stage in the job life cycle someone is visibly responsible for the job – it is possible to show all the jobs assigned to any one individual quickly and easily.

The system provides a central database where all the information about a job is held. As the system is multi-user it therefore allows anyone to ascertain the state of a job quickly. This means that customer queries about a job can be handled quickly and efficiently, saving valuable time in a busy service department.



Call Number	Call Date	CTIME	Priority	Category	Abstract	Location	WIP Status	Resource	Name
C0761	22/12/1999	13.27	3	quote	Quotation Required	ayr	10new	na	Alan James
738	07/12/1997	22.02	1	repair	Temp too high	glasgow	10new	na	Burne Vea
S2304	22/04/1999	10.35	88	quote	Boiler Not Working	cumber	80closed	igd	Cunningh
S0895	12/05/1999	07.38	5	service	Annual Service Boiler	glasgow	50sched	if	Delton Co
S0900	13/05/1999	10.19	1	repair	A/C too cold	glasgow	50sched	cd	Delton Co
S1952	28/07/1998	09.41	3	service	Service Line	glasgow	50sched	na	Delton Co
S1954	28/07/1998	09.41	3	service	Service Line	glasgow	50sched	na	Delton Co
S2301	15/04/1999	16.59	1	repair	Water leak	hamilton	10new	na	ECG Grou
729	12/11/1999	15.17	2	maint	A/c too hot	ayr	50sched	ka	Frank E Fr
C0759	27/07/1998	10.31	2	service	Service Heating	ayr	10new	na	Frank E Fr
C0775	01/11/1998	22.07	1	repair	Water leak	ayr	10new	na	Frank E Fr
G0002	02/04/1998	14.45	5	install	Time Clock Faulty	glasgow	10new	cs	Fred Smith
742	28/01/1998	13.40	1	repair	A/C too cold	glasgow	10new	na	Gordon B
751	13/04/1998	23.49	5	query	Faulty Valve	glasgow	10new	na	J/W Rober
S0904	27/07/1998	13.27	5	maint	Alarm Annual Maint	glasgow	10new	na	J/W Rober
S0908	27/07/1998	13.28	1	repair	Ignition on gas Fire	edinbur	10new	na	J/W Rober



Call Number: S2325 Abstract: A/C too cold

Customer: w030 Walker Matyn Software Ltd
Placed By: Office 1 Park Circus Place
Tel No: 0141 3327999 Glasgow
Asset: CONCORD 08678 SPILLRING - SLV
Contract: Service Work
Location: Glasgow G3 6AU

Work Req: The customer has phoned to request that an engineer look at the air conditioning system that appears to be failing as the office temperature is too cold

Order No: ORDER REF 123456 Called: 05/04/2000 at 09:58
Category: General Repair Work Req: 28/07/1999 at
Priority: Emergency Call Out First Response: at
Resource: Not Allocated Allocated on: 05/04/2000 at 09:58
WIP Status: New Call Last Status: 05/04/2000 at 09:58
Time Req: 0 (Hrs) Out of Hours Worksheet Printed Returned

Buttons: New, Update, Archive, Email

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JOB COSTING

The financial picture of each job is readily visible on the job invoice form which shows costs, sales value, margin and percentage margin for labour, material, other items and in total. There are various management reports showing job costing and profitability.

CUSTOMER HISTORY

A complete history of all jobs can be maintained, providing the facility to recall any job with details of who was on the job, time taken, materials used, costs, margin and any notes made at the time of the work.

It is possible to quickly find any job with the easy to use search mechanism that allows users to readily find any job based on whatever information is available e.g. address, customer, job date, invoice number, customer order number etc.

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

Estimate	Cost	Sell	Margin	%	
Labour	£0.00	£200.00	£400.00	£200.00	100.00
Material	£0.00	£43.90	£43.95	£0.05	0.07
Other	£0.00	£0.00	£0.00	£0.00	100.00
Totals:	£0.00	£243.90	£443.95	£200.00	99.01

Additional details from the interface include: Call Number 710, Invoice Number 101350, Date 11/04/1999, Net £443.93, Val £77.69, and Gross £521.62.

SYSTEM AUDITING

The system automatically logs the date and time of the call being placed, as well as any subsequent changes.

This audit is automatic and is not alterable by users, which means that an independent, verifiable history of "who did what & when" is built-in.

AUTOMATIC PRIORITY ESCALATION

There is a flexible method of entering jobs with specified service levels e.g. 4hour response, 8 hour response etc. The system then monitors the jobs and automatically escalates each one according to rules set up at the system level. This allows different contracts to be handled accordingly. The net result is that the system monitors all jobs and warns of those in danger of becoming late, or have become late.