



Access Service Manager



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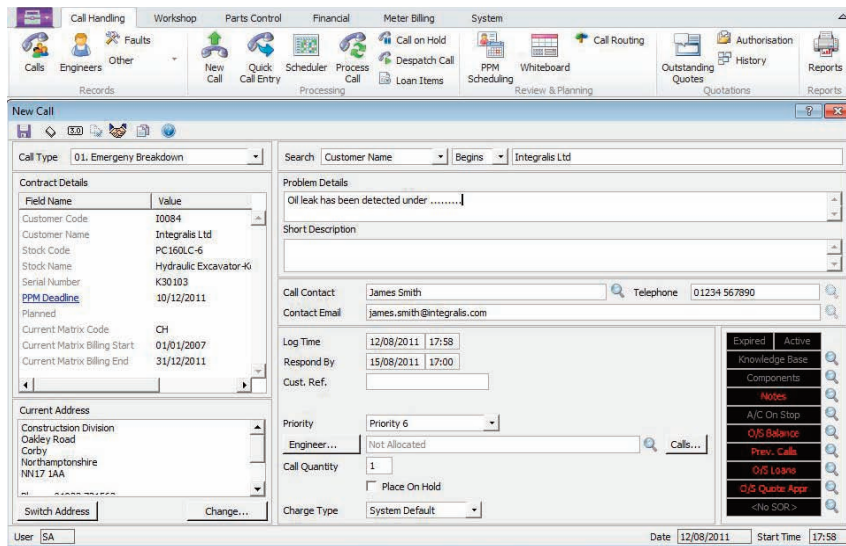
Access Service
Manager

From invoicing renewals and managing complex schedules to raising quotations and providing call support, Access Service Manager software provides complete control of all your service contracts.

Powerful service management

Designed to work in harmony with your Access business system as well as other financial packages, this highly configurable solution provides seamless integration with every area of your business.

As part of the Access product range, Access Service Manager enables you to connect all your business activities, providing complete visibility over all your operations.



New call entry screen: All the information you need to provide excellent service in one place. Prioritise and follow-up calls with ease, keep engineers fully informed and drive improved response rates with automatic call monitoring.

Service desk

Access Service Manager is powerful yet easy to use, allowing your call centre operators to work at speed with confidence – a basic requirement of all modern systems.

Incoming calls

Extensive search facilities ensure that all customer details and service contracts are managed quickly and accurately. The system keeps a full call history with drill-down for quick reference, with flashing icons to alert you to any outstanding calls, an account on stop or overdue loan equipment.

Taking jobs

Simply work through the logical screen layout to capture all the information needed for the engineer to carry out the job. System options can prevent more than one call being allocated to the same engineer at any one time, and you can easily drill-down to see current outstanding jobs by engineer. All jobs automatically generate a unique call number for traceability and to help you deal with incoming calls as quickly as possible.

Call despatch

Your call control team is always kept informed of progress via a single screen, which can be filtered to identify work for specific engineers

and response times. On-screen colour indicators provide instant visibility of call status, and are constantly monitored against contracted response times to enable performance analysis and improvement.

Job scheduling

Organising an engineer's schedule is a critical process in meeting response times. Access Service Manager provides you with graphical views of engineer activity and powerful allocation tools to drive consistently efficient resource planning.

Graphical view

Colour-coding and labelling enables you to differentiate between different types of job (for example, breakdowns and service jobs) as well as any generic business activity such as meetings and events. You can also plan in holidays and view sickness or absence.

Effective allocation

Filter by customer location, engineer skill set, or a combination of both. You choose the search criteria and the system prompts the best engineer(s) for the job. On allocation, your engineers receive a detailed job sheet either by fax, email or SMS, along with any call history so they go to your customer's site fully informed.

“Having instant access to information and stored procedures means that all our records are accessible when we want them. The inter-relational file structure means that re-keying is no longer necessary – and we can customise the information to create the reports we want.”

**Richard Briere
Holt JCB**

Call management

Response times are recorded automatically. All your engineers' travel times are entered, along with start and finish times. All details regarding job resolution, such as time of call, parts used, fix codes, parts required and loan items can all be entered.

Workshop

See what work's due in, how long it's taking and how much it'll cost. Full integration with the call centre module ensures operators and customers are kept in the loop while on-demand WIP analysis ensures tight cost control.

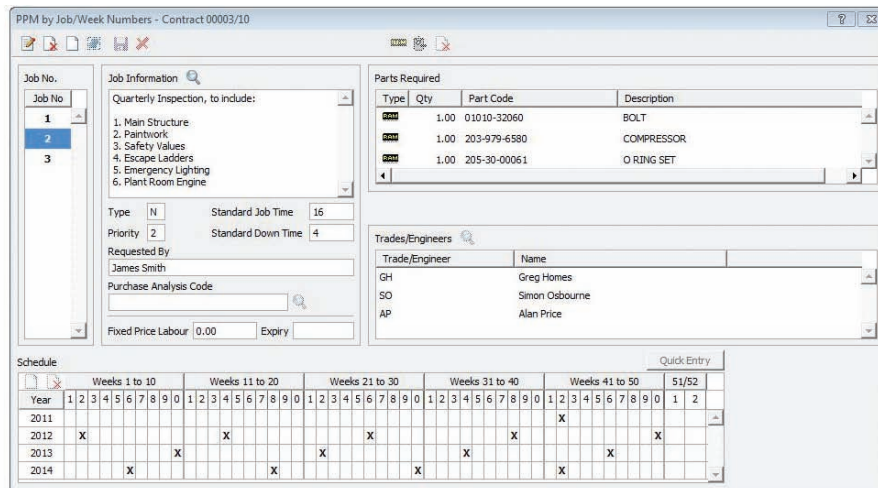
Quotations & authorisation

Quotations for work and parts that need customer approval are easily raised within the system. You can also incorporate a level of authorisation, which requires a purchase order number to be entered before the work is carried out.

All chargeable parts, stock and labour can be passed onto the customer using the billing module. Timesheets entered are recorded against each engineer and contract for further analysis regarding engineer utilisation.

“Service Manager allows for complete traceability of parts used, and even quotes generated if required. This process is followed right through to an item being sent back to site.”

Ger Costelloe
McHale Plant Sales



Planned Preventative Maintenance setup: Configure PPM schedules to fit your customers' requirements and view on a job-by-job or weekly basis to get an instant snapshot of all scheduled activity.

Keeping track

Once booked into the workshop, you can refer to any details entered by the call centre/field engineer, keeping their own notes separate when assessing work to be carried out. All timesheets and required parts can be recorded against the job, allowing you to choose whether each element of work is chargeable or not.

Reporting & analysis

You can easily view the profitability of all work being carried out, with user-definable codes enabling detailed analysis at any stage.

Parts management

Always have the right parts and spares within easy reach. Stock control will help to optimise your stock levels, enhancing your efficiency and profitability while ensuring you provide the best levels of service.

Parts database

User-definable sort fields enable you to categorise your parts database using terminology that's easily understood by your staff and provide powerful means of filtering, sorting and subtotalling data when reporting. All parts can be analysed into different locations to manage engineer van stocks. Minimum and maximum levels can be set per part to help with stock replenishments.

Full quantity and value information is tracked and consolidated at each level/location, for each stock record.

Van transfers

With engineers on the road, it's often more efficient for vans to meet up and swap stock, as opposed to returning to central stores. The van transfer facility is a quick, easy and traceable way to move stock between vans and any other locations.

Planned preventative maintenance

Create PPM (Planned Preventative Maintenance) schedules that minimise customer downtime, reduce your replacement costs and boost your reputation for reliability. Choose from a fixed-term contract or generate schedules on a job-by-job basis and build in additional extras such as pre-paid breakdown call-outs with ease.

Contract types

PPM calls can be created in a number of ways. You can specify a fixed quantity of visits over the period of contract, for example, 52 calls over two years will generate PPMs every two weeks. For flexibility, you can generate by 'X' months from the last call/deadline, or PPMs on a job-by-job basis, using week numbers to accommodate the work that needs to be carried out.

Customer contact

PPMs can be generated as far in advance as you/the customer requires. Letters are created automatically to inform the customer of the pending visit.

Quota calls

Contracts can also be sold with a number of pre-paid calls and tracked within the system. These operate separately to PPMs and are processed via the call centre as normal. A counter displays how many quota calls remain against the contract or line/s within it.

Contract management

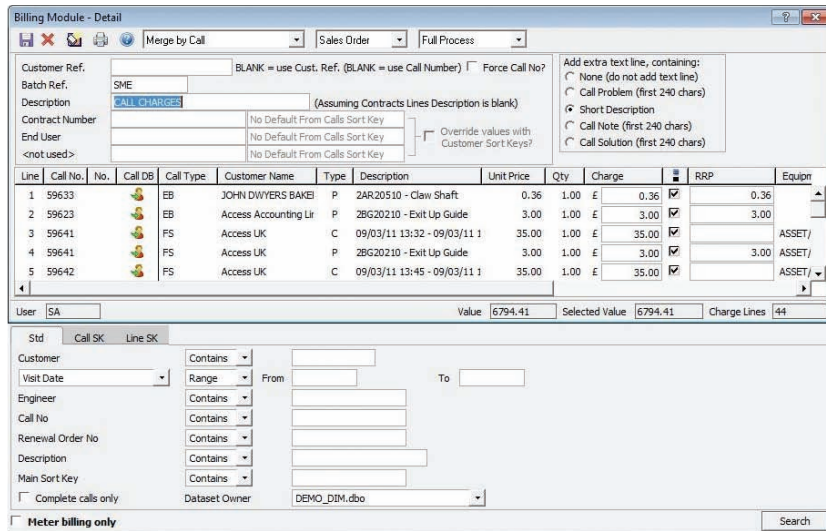
System flexibility ensures that contracts can be created to suit all variations of service contract components. Each contract can be allocated a system-generated contract code, status and type of contract.

Contract detail

Customer details are held against the contract, with different addresses for current, invoice and original delivery locations. An alternative 'end-user' account can be stored to support a reseller model and allow billing to a secondary account, where relevant.

Machine detail

In-depth information relating to each machine can be recorded and searched. Details include: serial number, asset



“We felt confident that Access could provide the whole solution for us and they were a company we could work with.”

Wayne Smith
Birmingham Airport

Billing module detail: A pre-defined rates schedule captures every chargeable element, such as the parts used at the customer’s site as shown here. This information then passes to the accounts department for fast and accurate invoicing.

tags, machine type, SLA information and warranty periods, together with a number of user-definable fields for extra information. These are available when searching and sorting records in the system, which can then be used as criteria for reporting purposes.

Contract profitability

Cost prices, including labour, parts and spares, are stored against all chargeable elements. A cost can be directly attributed to a contract for maintenance yet to be carried out. Profit reports provide you with the required management information to make informed decisions regarding contract pricing and uplift upon renewal.

Billing & contract renewals

Ensure all chargeable work and contract renewals are accounted for. Chargeable work may include engineer time and parts used on site, or work generated within the workshop module. In tracking engineer time, the exact labour charges can be calculated and applied where the contract specifies.

Rates schedule

A flexible rates schedule enables you to account for all renewals and chargeable activity, however complex. You can easily see the renewals due in any given period and deploy renewal notices and invoices in your chosen

format to ensure no contract is overlooked or forgotten.

Charging structures

Rates can be set at the smallest item of service to provide different charging structures to the same contract for different machines. This makes it very straightforward to pick the appropriate charges depending on the work that’s been carried out. The invoice wording can also be set against different types of SLA to automatically populate and format the invoice, bypassing the need for accounts department intervention.

Contract renewals

Simply enter the date range to ascertain which renewals are due within a given period in readiness for invoicing. You can produce renewal notices in as many different formats as your customers require and monitor their deployment in the period leading up to the renewal date. All rates and charges can be reviewed and easily adjusted prior to issuing the invoice.

Revenue recognition

You set the rules by which revenue is determined so that advance billing is recognised monthly, quarterly or however you require. The invoice is posted directly to the sales ledger for credit control and analysis whereas the income derived from it is posted into the relevant nominal period.

Meter billing

Ideal for the copier or franking machine industry, this feature enables you to track meter charges with ease. An unlimited number of meters are catered for, both for rentals and purchase models. One-time data throughput from machine to invoice makes the process fast and accurate.

Setup

The meter billing module is fully integrated to the database held within the contracts module. This enables machine configuration to be specified and the method for charge calculations to be entered.

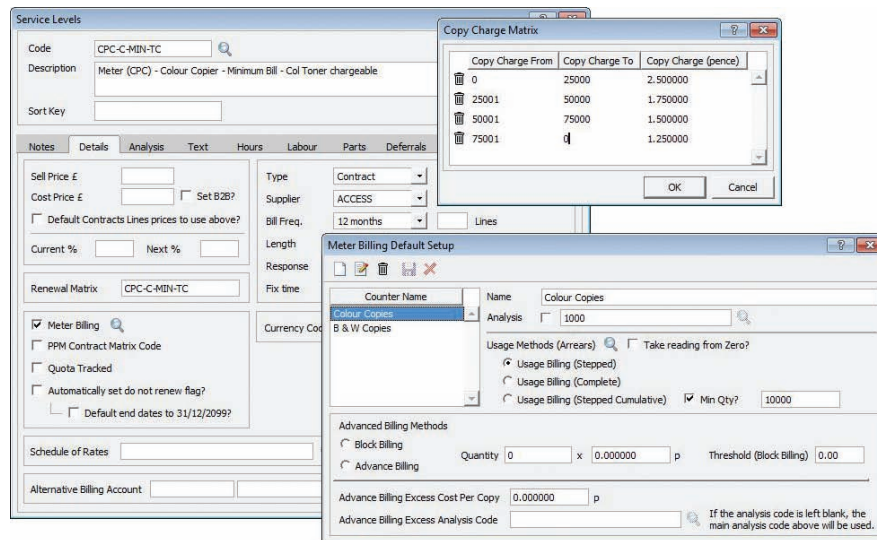
Meters

An unlimited number of meters are catered for, each one enabling you to set the parameters specific to the equipment. Where equipment is rented as opposed to purchased, a rental frequency and charge is entered.

The system can produce a list of readings required for a given time period, prompting your staff and enabling fast, efficient data management. All data supplied is then transferred to the billing module for invoice production with no re-keying of data. Service reads can be captured within the call centre module enabling you to further analyse copier usage.

“Service Manager really is a business critical solution for us and I am confident that it will continue to provide impressive returns on investment for us.”

Stephen Tate
Copy IT Digital Solutions



Meter billing setup: Configure machine specification, charging mechanisms and set copy charge parameters with ease. Integration with the billing module ensures information is captured quickly and efficiently for invoice production without any data duplication.

Copier charging methods

The following methods are supported:

- Stepped or complete usage billing in arrears
- Stepped cumulative usage billing in arrears
- Block billing in advance (with or without specific threshold)
- Advance billing.

Management reporting

Each module within Access Service Manager comes with a comprehensive suite of reports which can be easily tailored to meet your requirements. If necessary, we can create completely new reports for you.

Dashboard

Dashboard is a real-time management information console that shows all your key business activities (e.g. targets, performance levels, movement & trends) in a visual format.

Entirely web-based, this tool draws information from a single or multiple data sources, so you can graphically monitor key metrics from board level right down to the individual.

With both flexibility and functionality this is the simplest way to share business intelligence with any user within your business, regardless of industry or size.

All graphs can be drilled down to basic data in real-time, so you can be sure that the information you're viewing or sharing is accurate. You can decide how often you want the data refreshed (upwards of ten seconds) and how you want it displayed (e.g. as a rolling slideshow). Dashboard condenses large amounts of information and displays it in intuitive formats that give you an at-a-glance view of business activity.

Workflow Forms

Workflow Forms simplifies and centralises all your business forms. Share information across the company, adding security and permissions as you need to with alerts built in to keep the process moving. You have complete control in designing your own forms and the information it contains. Anything you previously stored in separate files (e.g. Excel spreadsheets) is now held in one place within one central document system. You'll see a significant reduction in paper waste and storage whilst actively making your business more responsive and efficient.

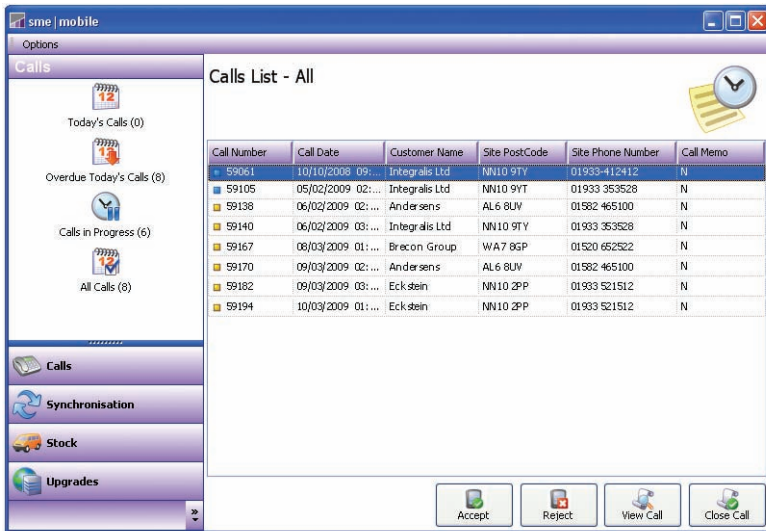
For example, when a contract extension has been approved, you may need to amend the contract end dates, re-align any remaining deferred revenue in the balance sheet and create a call to facilitate any

hardware changes. Using Workflow Forms, you enter that information in one place and the system automatically saves, updates and sends that information to the next step in the process, thereby putting a stop to disparate data entry that can cause bottlenecks and confusion.

Access Document Manager

Service Manager now links directly into Access Document Manager (ADM). ADM takes any documents in any format and allows you to store them in the same place. For example, contract statements produced in Word or Excel can be stored alongside emails and images. Simply scan in hard copies and they'll be automatically posted to your chosen location. You can also bulk-scan and auto-file – assigning documents to calls or customers as you go.

Plus retrieval couldn't be easier: through the search function ADM looks through all folders, sub-folders and databases using specific tag values or keywords. You can also see what documents are being worked on, the changes that have been made and even at what level the work has been carried out. There is also a check in/out system which ensures documents are worked on in isolation, reducing the risk that multiple versions are in play – and providing an accurate, live snapshot of work in progress.



“I have been delighted with the whole implementation and support offered by Access. The benefits to Jeol have been measured in a complete seamless end to end business solution.”

**Paul Hearn
Jeol UK**

Remote engineer access: Stay on top of job activity 24/7 with live updates delivered direct to your laptop. All required information is available at-a-glance, from call status with drill-down to customer details and stock look-ups.

Remote access

Distributing the latest information to field service engineers quickly and efficiently is a must for most service organisations. More and more customers want the facility to log their own calls electronically as opposed to contacting the call centre and to be able to view the progress of these online.

Downloading jobs

With internet access, engineers can retrieve the very latest job information 24/7, passing details back to head office via inexpensive hand-held devices or their laptops. Having logged on, either on-site, at the office or at home, they can view allocated calls and associated customer details. Details about jobs complete, for example, times, parts used/required and fault analysis can all be entered and routed seamlessly into the core system for processing without any re-keying.

Mobile working

To facilitate mobile working, your engineers can choose to receive an update of job allocations direct from the call centre to their handheld PocketPC. Workflow enables engineers to close visits, and on completion, can upload call details and the customer's signature back to head office. The device synchronises calls, parts, fault analysis codes and more via GPRS.

Customer portals

Logging on to a secure website enables customers to see the status of outstanding calls and optionally, to log calls directly. This both enhances the customer experience while shifting the pressure away from your call centre staff so they can focus on call resolution.



To find out more about our consulting, software and solutions, telephone us on 01206 322575 or email info@theaccessgroup.com.

Alternatively, visit the Access website at www.theaccessgroup.com, where you can download further information such as brochures, info guides and customer case studies.

We look forward to helping you achieve complete business clarity.

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