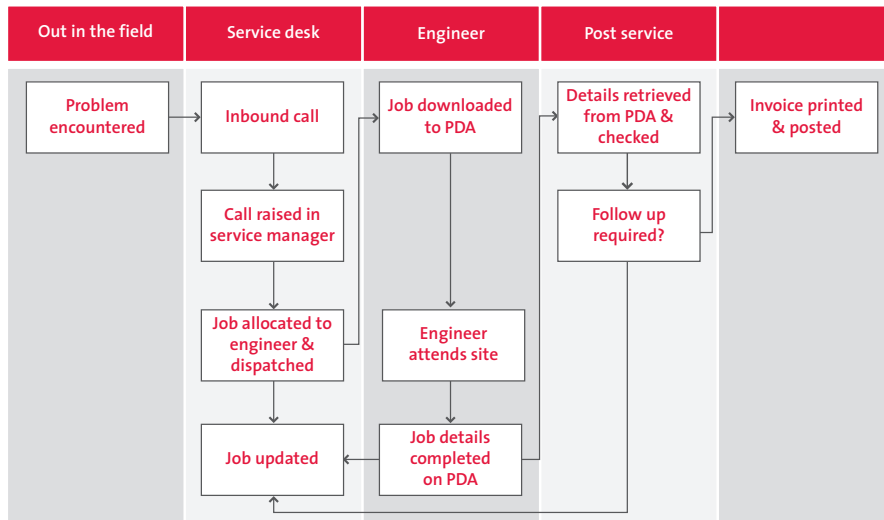


Access Service Manager

From invoicing renewals and managing schedules to tracking outstanding jobs and providing call support, Access Service Manager gives you total control of your service contracts. Available as part of Access Dimensions or seamlessly integrated with your existing financial packages, this powerful solution provides excellent functionality for every area of service.

So whether you're taking calls, allocating resources, attending sites or billing, we'll give you the visibility you need to increase customer loyalty and attract new business.



Call Centre

Full call history is easily accessed from one searchable screen ensuring your call centre gives a fast, confident service. On-screen alerts, colour-coded priority statuses and call centre KPIs drive continually improved response rates.

Work at speed with confidence

Full call history is easily accessed from one searchable screen with drill-down for quick reference. Flashing icons advise when action is required, alerting your operators when customer accounts are on stop or loan equipment is overdue.

These indicators also help with daily task management by indicating any outstanding calls that require attention.

Taking jobs

Your operators simply work through the logical screen layout, capturing all the data that the engineer needs to carry out the job, such as fault/failure codes. All jobs automatically receive a unique call number for traceability.

Call centre KPIs

On-screen colour indicators show the priority status of any call at any time. All calls are monitored against their contracted response times for ongoing analysis and improvement.

Job Scheduling

Manage multiple calls, allocations and all day-to-day office activity from your graphical diary. Maximise your resource allocation and promote effective collaboration between the office and the field-based team.

Contents

Call Centre

Job Scheduling

Workshop

Parts Management

Planned Preventative Maintenance

Contract Management

Billing & Contract Renewals

Meter Billing

Self-service

Workflow Forms

Document Management

Management Reporting

View availability

Each engineer has their own graphical diary so you can immediately check their availability. Colour-coding and labelling enables you to differentiate between different types of job (for example, breakdowns, return to fit and service jobs) as well as any generic business activity such as meetings and events. You can also plan in holidays, view sickness and absence. Double-click on the planner to get full detail about each job.

Workforce management

You can open multiple diaries at one time, making it easy to re-allocate jobs between engineers by simply using 'drag and drop.' Manage larger projects by extending jobs to multiple engineers over multiple days.

Effective allocation

Filter by customer location, engineer skill set or 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.

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. Optional information such as customer order reference and 'next visit reminders' can also be recorded, as well as call codes to provide analysis on the most frequent faults and fixes.

Workshop

See what work's due in, how long it's taking and how much it'll cost. The workshop provides visibility of chargeable parts, stock and labour together with detailed WIP analysis for complete clarity over your profit line.

Keeping track

Once the item has been booked in, your operators can refer back to any details entered by the call centre or field engineer.

Chargeable elements

Your operators can elect whether the work to be carried out is chargeable or not. All chargeable parts, stock and labour can be passed onto the customer using the billing module. Timesheets are recorded against each engineer and contract for further analysis.

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.

Non-contract equipment

A trade counter facility records all relevant customer details and equipment to be examined and introduces the item into the workshop. Any internal refurbishment can also be booked the same way. Parts and equipment no longer required by the customer, but successfully refurbished, can form part of available stock.

Reporting and analysis

User-definable codes can be selected for future reporting analysis to show the profitability of all work that has been carried out. The ability to view work due in, and current work in progress, together with accurate cost control and integration to the billing module, makes the workshop module an essential part of service management.

Parts Management

Always have the right parts and spares within easy reach. Set minimum and maximum stock levels for each van, and the system will prompt an appropriate re-order quantity when these levels are reached and automate the purchase order to suppliers.

Parts database

User-definable sort fields enable you to tune your parts database using terminology that's easily understood by your staff and provide powerful means for filtering, sorting and subtotalling data when reporting.

All parts can be analysed into different locations to manage van stocks. Minimum and maximum levels can be set on each part for different engineers 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 (PPM)

Tailor PPM 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 2 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 breakdown calls and tracked within the system. These operate separately to PPMs and are processed via the call centre as normal. A counter tells the operator how many quota calls remain against the contract or contract line.

Contract Management

Contracts can easily cater for multiple pieces of equipment across multiple sites. Key criteria, such as cost price and warranty information, resource costs and serial numbers, can all be accessed and analysed, providing the information needed to make informed decisions regarding contract pricing, uplifts and profitability.

Contract detail

Allocate a contract code, status and contract type against each contract. View all customer details within a few clicks, such as multiple addresses/current location, invoice address and original address down to machine level. Alternative addresses can be stored for an 'end user' if this is not the billing account.

Machine detail

In-depth information relating to each machine can be recorded and searched. Details include: serial number, asset tags, machine type, SLA information and warranty periods together with a number of user definable fields for extra information.

Components list

Additional levels enable further information to be stored, tracking information such as cost price, quantities, serial numbers, warranty detail and more. The system will prompt you when parts are being used to add to, or replace from, the components list.

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 contracts 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

A flexible rates schedule, encompassing everything from call out charges and labour rates down to fitting and travel charges 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 ensuring no contract is overlooked or forgotten.

Schedule of rates

Rates can be set at the smallest item of service to provide different charging structures to the same contract for different machines. This then 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 service level agreement to automatically populate and format the invoice, bypassing the need for accounts department intervention.

Contract renewals

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 recognised so that advance billing is recognised monthly, quarterly or however you require it. 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.

Counter readings

An unlimited number of paper sizes/counter readings are catered for, each one enabling you to set the parameters.

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.

Meter readings

An unlimited number of meters can be catered for, each one enabling you to set the parameters. 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/engineer readings can be captured within the call centre module enabling you to further analyse copier usage.

This will also facilitate estimate readings for those machines where chargeable meter readings have not been received.

Copier charging methods

The following methods are supported:

- Stepped usage billing in arrears
- Complete usage billing in arrears
- Stepped cumulative usage billing in arrears
- Block billing in advance
- Block billing with threshold (in advance)
- Advance billing
- Minimum monthly billing.

Self-service

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. Customers can log calls directly through a secure website and check job progression, shifting the pressure from your call centre while enhancing the service experience.

Remote access

Having logged on, either on-site, at the office or at home, engineers can view their 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.

Hand-held devices

To facilitate mobile working, your engineers can choose to receive an update of job allocations direct from the call centre to their handheld PocketPC. On completion of a visit, call details and the customer's signature can be uploaded back to head office. The device synchronises calls, engineer parts, fault analysis codes and more via GPRS.

Customer portals

Logging on to a secure website enables customers to enter call information directly and check job progression via visibility of their call status. This simultaneously enhances the customer experience while shifting away the pressure on your call centre so they can focus on call resolution.

Workflow Forms

Workflow Forms make it easy to capture information across your company. You design the forms to contain the information you need, plus set security and permissions with built-in alerts to keep the process moving. Anything you previously stored in separate files (e.g. spreadsheets) is now held within a central document. With Workflow Forms, you enter the information once; the system automatically saves, updates and sends the information to the next step in the process.

Document Management

Store, search and find documents fast. Keep all documents, regardless of format, in a central store with links to client, supplier or project records. Find documents with powerful search tools including tags, keywords and content search. Control who has access to areas of storage, document type or individual documents, and keep full audit/version history to ensure you track every movement and document update.

Management Reporting

Quickly sift through complex information and produce reports in a format that's right for you. Choose from a comprehensive suite of reports, which can be tailored to meet your needs.

In addition, dashboards provide an at-a-glance view of your key business activities; from individual performance against targets or average time – to responding to client to stock levels within your workshop or general trends in the business.

Reports can be investigated to find out from where the underlying data, trends and statistics originate.

Who we are

Access UK is a specialist software developer and consultancy business with over 20 years' experience. Our team of expert accredited consultants operate across the UK and Ireland. Aside from an impressive array of software awards, we're also ranked 85th in The Sunday Times 100 Best Companies to Work For 2011.

Proudly independent, all our software is developed in the UK, supported locally and accessible globally. Our solutions take a whole-company approach, aiming to cut through complexity and increase efficiency. At every level.

Already field-leaders in accounting and finance, Access also offers solutions for manufacturing and distribution, professional services automation, carbon emissions measurement, reporting, payroll, document management, service management and CRM.

Further information

For further information on the Access software portfolio, please telephone us on **01206 322575**, email **info@theaccessgroup.com** or, alternatively, visit our website at **www.theaccessgroup.com**