

ABM's outstanding & easy to use
service management software

ABM Service



INTRODUCTION

Service management software as easy as

1, 2, 3 . . .

ABM Service Module is a software package designed specifically for the Service Industry, offering a wide variety of features that are invaluable for saving time and money in the running of your business.

The benefits are endless in terms of administration, management, productivity, convenience, cost and professionalism.

ABM Service Module has been designed from the beginning to be flexible to be able to fit into your business allowing you to be able to introduce this advanced system with the minimum fuss to your existing procedures.

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Benefits

Any system is only worth the benefits it can provide your business. ABM Service Module is a fully featured service management system designed to add value to your business by helping streamline your service delivery and management.

BENEFITS

Some of ABM Service Module benefits include:

Efficiency

ABM Service Module deals with the paperwork involved in the running of a service business. For each installation an extension record is kept of all details including name, address, fax, mobile and land line numbers, along with area, email addresses, equipment types, customer type, installation staff, warranty dates, etc. Full tracking is kept of all service calls – past calls and those outstanding.

Automatic invoices can be created for recurring billing. The system incorporates a link to Crystal Reports, a powerful report generator for designing your own reports as well as standard reports for the business i.e. history reports, engineer response times, new/lost revenue etc.



Administration

The system can increase productivity and lower costs because the decrease in time spent managing your business will optimise your staff's resources. It will be possible to delegate work to your engineers more effectively because of the Manage Call program and history information and analysis.

Ease of Use

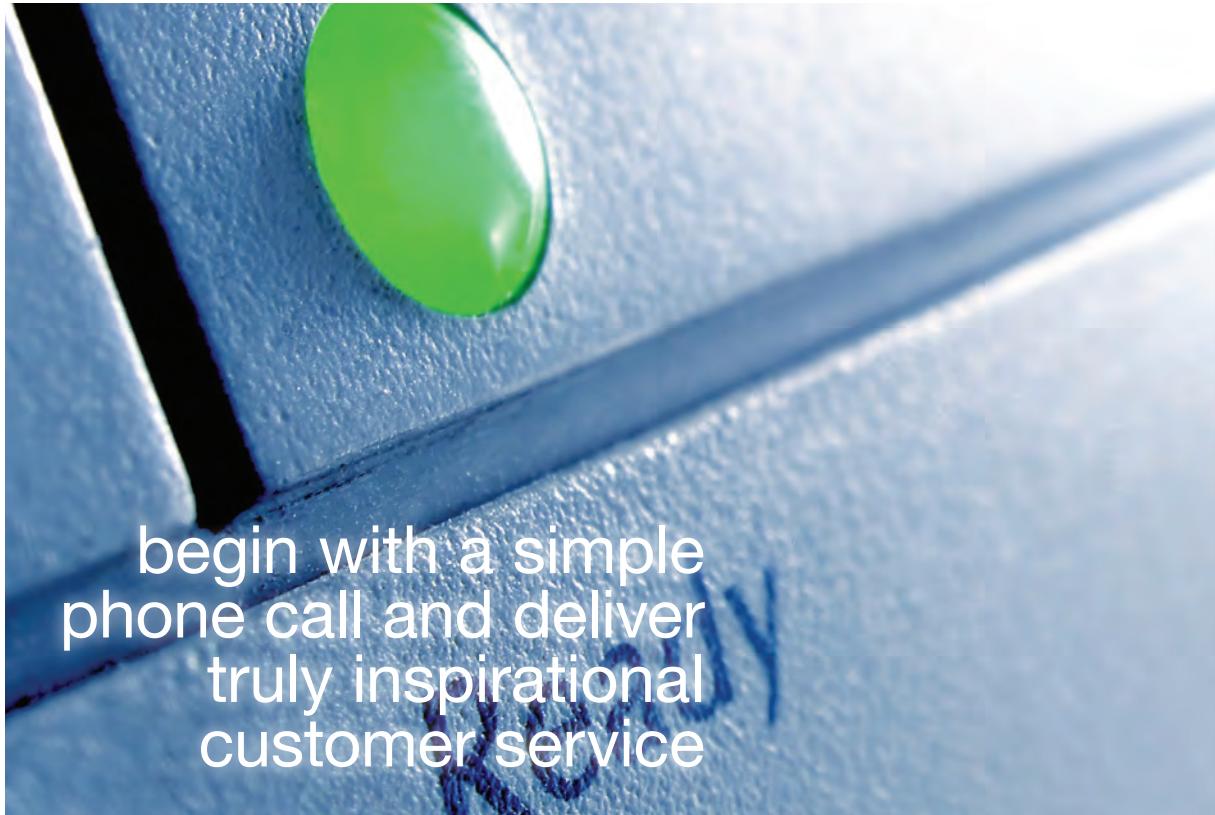
Being a structured Microsoft Windows program it is extremely easy to use with instant secure access to all information providing immediate results and thus projecting a more professional and efficient image to your customers.



Incoming Call

On the outset of the call, the ABM Service Module allows recorded information to be categorised for quick reference and fast dispatch. This call management facility ensures calls are quickly routed to their desired destination.

1 2 3 4 5 6 7

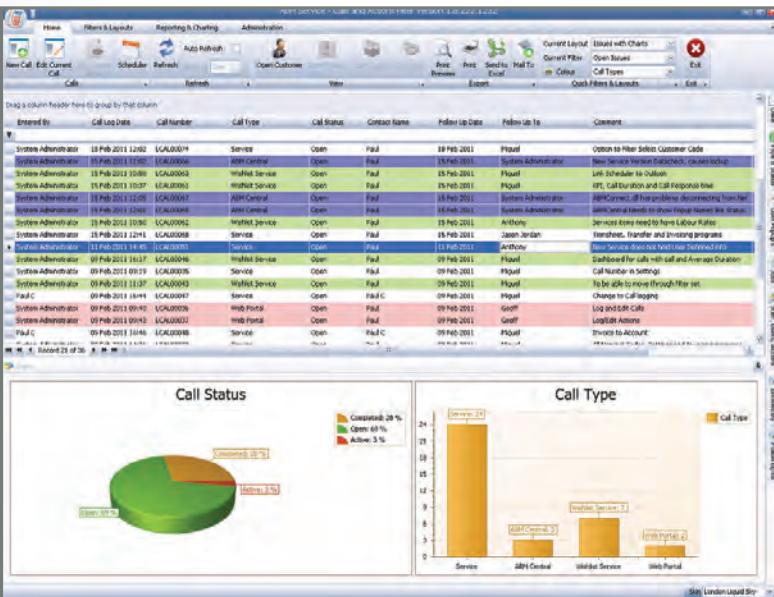


begin with a simple
phone call and deliver
truly inspirational
customer service



Manage Calls

When a call comes in, the operator enters in a description of the call, the date and time the call is due, call priority, analysis and a detailed memo as required.



You can enter a purchase order number, specify whether the call is chargeable or not and allocate an engineer or department to the call.

It is possible to add actions to an ongoing call and when the call has been completed it is then answered on the system.

The Manage Call program enables the user to filter calls by various criteria for viewing and printing. The user definable grid ensures the user can view the information on screen that is most relevant to them. Therefore enabling the calls to be sorted quick and easily by various options such as area, call type, urgency, engineer, data ranges, etc.

Outstanding calls for individual staff members can be recalled instantly and relayed to them straight away by various means.

There is full traceability for all stages from when the call is initially logged in the system to its completion whether it requires a service visit or not.

You can also email the call to the engineer and there is also an option to send the call details to certain smart mobile handheld devices, as well as various inexpensive ways of texting the call details direct to the relevant engineers' mobile phone, if required.

Logging Calls

After the initial call has been received, the program ensures all vital information is carefully recorded and stored for easy retrieval, auditing purposes and to ensure any or all of the relevant information is received in a timely manner.

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To ensure all calls are logged efficiently, ABM Service Module encompasses the following features:

Full History

Including service date and time, hours spent both working and travel time, engineers, type of call, whether covered under warranty, maintenance or chargeable. There is also the ability to view, reprint and email an invoice if the call was chargeable. The system also includes history for non-chargeable work. You can also trace back from the history to the initial call.

Stock Control System and Tag Links

The Service Module integrates with ABM back office stock systems as well as keeping track of relevant items for each installation such as serial number, supplier, and warranty details. Special Prices can be maintained and automatically implemented if need be.



Scheduler

Organising call out dates and times is made simple with the Service Module in an intuitive and familiar schedule and calendar system.

Date	Call Details
21 February	09:00-11:00 Systems Administrator Call Nr: LCA00002 Status: Open Action Status: 2 Customer Issues: None Comments: Import Call Program from Excel Description: Import Call Program that would normally be done in the spreadsheet The import program would ask Call Type: Pallets & to and follow up date Call Nr: LCA00002 Status: Open Action Status: 2 Customer Issues: None Comments: Import Call Program from Excel Description: Import Call Program that would normally be done in the spreadsheet The import program would ask Call Type: Pallets & to and follow up date
22 February	09:00-11:00 Stephen Call Nr: LCA00024 Status: Open Action Status: 2 Customer Issues: None Comments: Import Call Program from Excel Description: Import Call Program that would normally be done in the spreadsheet The import program would ask Call Type: Pallets & to and follow up date Call Nr: LCA00027 Status: Open Action Status: 2 Customer Issues: None Comments: Import Call Program from Excel Description: Import Call Program that would normally be done in the spreadsheet The import program would ask Call Type: Pallets & to and follow up date
23 February	10:00-12:30 Demand Call Nr: LCA00029 Status: Open Action Status: 2 Customer Issues: None Comments: Import Call Program from Excel Description: Import Call Program that would normally be done in the spreadsheet The import program would ask Call Type: Pallets & to and follow up date
24 February	11:00-13:00 Demand Call Nr: LCA00029 Status: Open Action Status: 2 Customer Issues: None Comments: Import Call Program from Excel Description: Import Call Program that would normally be done in the spreadsheet The import program would ask Call Type: Pallets & to and follow up date
25 February	11:00-14:30 Stephen Call Nr: LCA00033 Status: Open Action Status: 2 Customer Issues: None Comments: Import Call Program from Excel Description: Import Call Program that would normally be done in the spreadsheet The import program would ask Call Type: Pallets & to and follow up date Call Nr: LCA00039 Status: Open Action Status: 2 Customer Issues: None Comments: Import Call Program from Excel Description: Import Call Program that would normally be done in the spreadsheet The import program would ask Call Type: Pallets & to and follow up date
26 February	12:00-13:00 Systems Administrator Call Nr: LCA00039 Status: Open Action Status: 2 Customer Issues: None Comments: Import Call Program from Excel Description: Import Call Program that would normally be done in the spreadsheet The import program would ask Call Type: Pallets & to and follow up date Call Nr: LCA00040 Status: Open Action Status: 2 Customer Issues: None Comments: Import Call Program from Excel Description: Import Call Program that would normally be done in the spreadsheet The import program would ask Call Type: Pallets & to and follow up date
27 February	13:00-14:00 Paul C. Call Nr: LCA00040 Status: Open Action Status: 2 Customer Issues: None Comments: Import Call Program from Excel Description: Import Call Program that would normally be done in the spreadsheet The import program would ask Call Type: Pallets & to and follow up date Call Nr: LCA00041 Status: Open Action Status: 2 Customer Issues: None Comments: Import Call Program from Excel Description: Import Call Program that would normally be done in the spreadsheet The import program would ask Call Type: Pallets & to and follow up date
28 February	14:00-15:00 Demand Call Nr: LCA00041 Status: Open Action Status: 2 Customer Issues: None Comments: Import Call Program from Excel Description: Import Call Program that would normally be done in the spreadsheet The import program would ask Call Type: Pallets & to and follow up date

Additional Contact Details –
The system allows users to input an unlimited number of contact details each containing multiple addresses as well as phone, fax, mobile numbers, email addresses and various notes.

Dispatching Service

Once the vital information has been collected a suitable engineer or team of engineers is able to be dispatched. ABM Service Module assists engineers on site by providing useful and critical information from a single source.

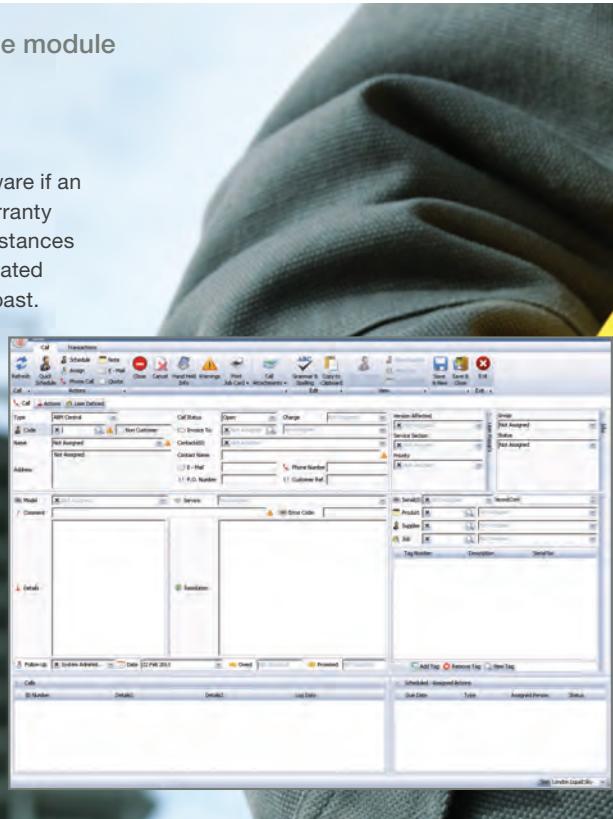
1234567

To deliver truly exceptional service, the service module encompasses the following features:

Tag Equipment Tracking

It has the ability to track equipment on site via Tag Numbers, the service calls can be booked to the account and to the Tag Item itself so

the system will be aware if an item is still under warranty and also track any instances or breakdown associated with this item in the past.





Layouts and Installation Floor Plans

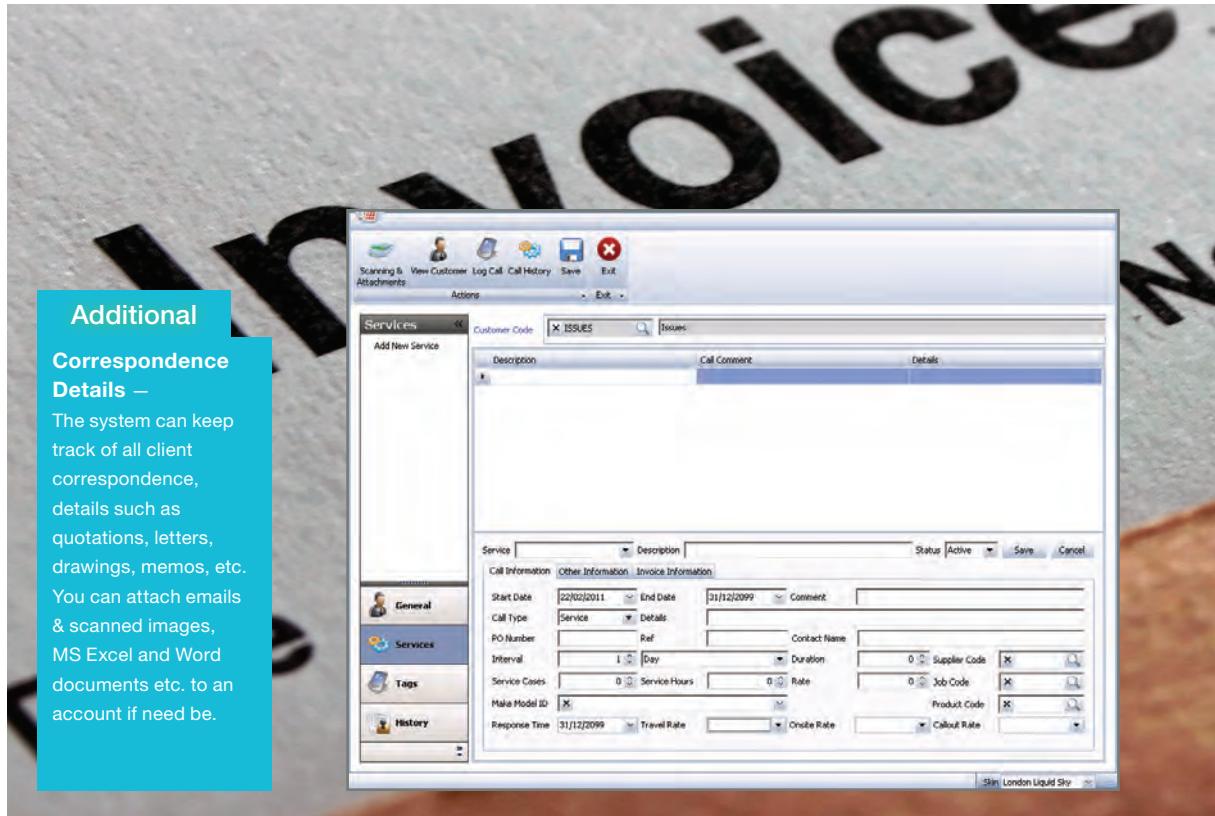
ABM Service Module has the ability to attach floor plans and pictures for each individual installation if necessary.



Invoicing

Invoicing can be a time and costly consuming process, which can pull staff away from more important tasks. ABM Service Module easily handles invoicing with it's many additional automated functions.

Additional Correspondence Details –
The system can keep track of all client correspondence, details such as quotations, letters, drawings, memos, etc. You can attach emails & scanned images, MS Excel and Word documents etc. to an account if need be.





To assist with the daily task of invoicing, the system includes the following features:

Invoicing

For non-recurring billing i.e. for initial installation charges and other service calls not covered under warranty it is possible to create invoices and to record them in the customer's history record. You can recall a complete list of invoices and credit notes for viewing with an option to reprint and or email any of them if you wish

Recurring Invoicing

It is possible to generate automatic invoices for maintenance, rental, monitoring and any other billing description you wish to define. Invoices are generated according to the billing terms for the installation (i.e. annually, quarterly, bi-monthly, monthly etc.) from the date set and can be invoiced in advance or in arrears. Service calls can be logged automatically for each different service provided. There is a facility to increase or decrease any of the fees by a certain amount or by a percentage for all or some installations. It is possible to enter an end date for a contract and also to freeze the fee until a specified date. It is also possible to cancel the billing contract for

any period of time and reinstate it at a later date if necessary.

The service module is an integral part of the ABM accounting system. This enables instant viewing of customer outstanding balances, credit limit and date of the last transaction as well as the drilling down of transactions via the accounts viewer. We can also import relevant static accounts data into ABM Service Module from systems such as Sage, MYOB, Sybiz etc.

Additional

ABM –

Advanced Business Manager is an internationally acclaimed fully featured and comprehensive accounting software solution. For more information contact your local solution provider



www.advancedbusinessmanager.com

Reporting

Key to management of a successful business are relevant and timely reports. ABM Service Module allows powerful reports to be quickly produced as well as easily customised for your businesses unique requirements.

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ABM Service Module produces reports on many aspects of the system such as:

Troublesome Installations

Allowing you to monitor accounts with the most frequent service calls.

Engineer Time and Cost Analysis

Providing a detailed breakdown by engineer of time spent on calls and costs incurred.

Information Status Report

Provides a quick synopsis of the all live contracts with their cost and revenue generated as well as the lost contracts.

Service Call Costs

The Service Module gives a breakdown of services supplied to each installation and it also gives costs incurred for each contract.

Advanced Billing Revenue Analysis

The ABM Service Module has the capacity to calculate income that is due from recurring invoice payments for the current period or for any period in the future. It is also possible to see the income that has been lost due to cancelled billing contracts.

Various Other Reports Available

Because the system integrates with Crystal Reports various additional reports can be created.

Additional

Crystal Reports –

It is possible for you to customise your own reports using whatever installation details you wish utilising Crystal Reports. Within this software is a mail merge facility. This is a letter sending facility to some or all of your clients with optional inclusion of contact name and address, contract details, current and aged balances due, etc. It is also possible to export information to link into other software packages such as Microsoft Office. If you are not familiar with Crystal Reports, we can do report modifications for you.

Optionals and Technical

Along with its vast amount of standard features, The Service Module also includes a handful of additional options to further assist in the management of your service business.



As an ever evolving system it includes the following additional software options:

Optional Link to Remote Engineer Module

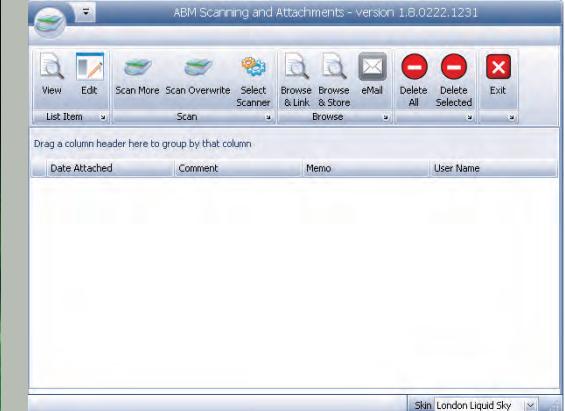
We also have our software running remotely for relevant engineers on certain Microsoft Windows handheld devices thus providing a paperless solution. The engineer can have controlled 24-hour access to call history and service calls logged via 3G/GPRS/WiFi.

The engineer can securely retrieve call history and other relevant call information remotely in relation to their service call and the customer can sign the screen to confirm that the call has

been done and the service call details and the signature are then sent back to Head Office in a few seconds. If an engineer is given the rights they can also create an invoice on site if necessary.

Calls can be automatically dispatched at any time to the relevant engineer saving both time and mobile phone costs.





Optional Link to Document Scanning

This enables signed service dockets to be scanned quickly and efficiently into a central server and enable quick retrieval of them from an individual client's history file. The scanning module can also store and retrieve any documents or files i.e. incoming mail, brochures, delivery notes, purchase invoices, spreadsheet files, C.V.'s etc.

Software Modifications

ABM Service Module Software is regularly modified and updates are received through the ABM Gold Cover scheme.

Web Portal

Allows the controlled facility for your customers to remotely log in a service call into the ABM Service Module and follow through it's progression from start to finish if so wished.

Web Portal

The ABM Service Web Portal is an internet based website that allows external users such as your customers, or agents for example, to log calls into your ABM Service Module.

It can be configured to link a user's login directly to a customers' account in ABM, so when they log a call it is assigned to their own account, they can also see any other calls logged for their account and see the status of their call and any actions assigned to that call. The Web Portal can also email them any changes of status on their calls.

Another usefully feature of the Web Portal is to setup your external staff members on it, to allow them to see any calls scheduled to them, they can then use the ABM Web Portal to update the status of these calls while they are on the road. You can also setup internal ABM users with login's to ABM Web Portal that allow them to see and maintain their own calls while they are out of the office or onsite.

The Service Manager can be setup to use the Web Portal so they can see any calls that have been logged and they can assign actions for these calls while they are out of the office.

ABM Web Portal also allows emailing and printing of job cards that can then be filled in and signed onsite.



ABM ADVANCED BUSINESS MANAGER

Home Calls Log Call Actions Add Action Settings Logout Company Logo

Service Calls

All Accounts

Call No.	Customer	Logged	Status
LCA0000144	All Weather Service Company Service is outstanding	16/02/11 14:30	Web
LCA0000143	Brilliant Burgers Server HD Down	14/02/11 17:31	Web
LCA0000141	Brilliant Burgers Can print statements	03/02/11 22:17	General
LCA0000140	Tasty Pancake Company Install Mitsubishi 8127398	02/02/11 10:10	Web
LCA0000139	All Weather Service Company Broken roof needs fixing asap	02/02/11 14:12	Web

All Accounts

Call Status: OpenCalls

Call Type: All

All Calls
 My Calls

Results per page: 15

Log Date from: 01/02/2011

Log Date to: 22/02/2011

Find Call

Search

View Actions

Service Call LCA0000144

Customer	All Weather Service Company
Address	
Status	Web
Type	General
Contact Person	Admin
Reference	
P.O. Number	
Date Logged	16/02/11 14:30 by ABM
Description	Service is outstanding on microwave please call
Details	
Resolution	don't add extras to charge out

Actions (0) Edit Call Cancel Call

Print Call Print Call Detail Email Call To: mg2h@ericom.net

User: abm ABM Service Portal for ABM Accounts. © 2011 D P Systems Limited





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