Xperience

MAINTAINING A STRONG
FINANCIAL FUTURE

service365 Maintaining a Strong Financial Future

Service and facilities management businesses are reliant on IT systems to improve profitability, retain customers and improve workforce utilisation. With contract subject to fierce price competition the emphasis is on meeting contracts are subject to fierce price competition and the emphasis is on meeting customer SLAs to maximise customer satisfaction and retention.

service365 is powered by Microsoft Dynamics 365 Business Central. It is a complete end-to-end service management solution with comprehensive functionality and features designed to help your business gain greater control, improve margins and drive growth. This includes SLA's, Service Desk Call Management and Resource Scheduling. The system offers full mobile capabilities including customisable workflow, signature capture and configurable surveys and questionnaires.

service365 can be accessed on PC's / Laptops, Tablets and Smartphones.

service365

service365 manages details of contracts, sites and equipment including contractual SLA terms, planned visits, tasks and service history.

Role Centres

Role Centres provide users with immediate access to relevant information and data to enable effective call and SLA management. Information can be displayed graphically with immediate drill down to underlying data.

Service Contracts

Allows you to maintain all the information needed to manage service contracts, including site details, equipment, SLA's, planned call schedules, contract tasks and billing terms. It is extremely flexible and allows your business to set up different contracts to reflect both your customer and your business needs.

SLAs

service365 allows you to set up SLA terms against each contract including call priorities and required response times. SLA performance is constantly monitored and users can easily view or be alerted to calls that are nearing SLA limits. SLA data can be updated in real time by your workforce via mobile365.

Service Sites

Allows you to record details of all of the sites where you need to carry out service work. including address, contact information, notes, equipment and planned tasks. A full history of all service work carried out at a site is maintained.

Equipment

service365 allows for a full equipment register to be maintained with each equipment item being allocated to a site and contract. Comprehensive information can be recorded including serial numbers and model details. A full history is maintained of all service work carried out on each equipment item.

Workforce Resources

Resources such as engineers and sub-contractors can be set up with details such as skill sets and geographical regions. Calls can be allocated based on skills and region matching, diary availability and vehicle tracking/map information.

Service Calls

Service calls can be raised against a contract, site and equipment item. Types of calls include reactive, planned and quoted. Each call can be broken down into user-defined stages such as received, allocated, accepted, travelling, on-site and completed.

Calls can be created with multiple tasks with different requirements such as annual, quarterly or monthly visits. Consolidated call routines allow for tasks to be grouped together ensuring call efficiency.

Van Stock and Replenishment

Van stocks can be managed in service365. Stock can be issued to service calls enabling first time fixes and maximising customer satisfaction. Van stock replenishment routines can be automated based on re-order levels with requisition and approval routines if required.

Integrated Invoicing

Integrated invoicing routines clearly highlight calls that are due for invoicing. Flexible invoicing options are available and are set at a contract level including fixed price, schedule of rates, time and materials, cost plus or based on quoted work. Users can adjust suggested invoicing and authorisation options are available if required.

Scheduling

service365 includes a powerful graphical resource planning tool, allowing for service calls to be automatically or manually sent to the schedule for planning. Planners are then able to easily allocate calls to ensure the right people with the right skills, are at the right place at the right time to meet the SLA demands of your clients.

Open Tasks

All open service calls can be clearly viewed in a list format. These can be easily filtered by priority, call type, region, skill type and customer. Using 'Drag and Drop', calls can be simply allocated to one or more resources on the main planning board.

Map

The built in map graphically shows the whereabouts of your resources and the location of calls that need to be planned. This allows for planners to easily determine which resource is best placed to attend reactive calls.

Planning Board

The Planning Board is pivotal to the scheduling function, clearly displaying the workloads of each resource over the selected timeline. Calls can be allocated to or moved between resources using 'Drag and Drop' functionality. A clear visual display allows users to differentiate between

different call types. Calls are updated in real time to show the status of each call as it progresses.

Views

The view functionality allows users to view the planning board by day, week, month and timeline.

Category Overview

The category overview provides a colour-coded key highlighting the relevant response times associated with a job. By matching these colours to the jobs on the planning board, the scheduler knows the urgency required when allocating the work.

Task View

The task view provides more detailed information on a highlighted service call. Full drill down to the call record in service365 is available.

For more information

Call us on: 028 9267 7533 or email: enquiries@xperience-group.com

Maintaining a strong financial future

mobile365

mobile365 is fully integrated with service365 allowing for calls to be sent and completed by remote workers. This eliminates the need for paper-based job sheets, allows real time reporting and speeds up the billing process.

mobile365 is a device independent solution that is fully configurable and allows for the specific workflow and form requirements of each organisation.

On-line/Off-line

mobile365 works in both an on-line and off-line mode. This means that remote workers can continue to process calls on their mobile device even when they are out of signal. When the mobile device picks up a signal, it will send the relevant information back to service365 and pick up any new calls that have been allocated.

Multiple Platforms

mobile365 works seamlessly on smart phones, tablets and rugged devices. Multiple operating systems are supported including Windows 8 and Android.

Customisable Workflow

Whether you want to create a simple work flow on a smart phone or a complicated process chain on a tablet device, mobile365 provides role-specific work flows to field workers allowing them to carry out an extended range of services in a timely fashion and to the highest standards, effectively and efficiently.

Surveys/Questionnaires

Mandatory surveys and questionnaires can be customised to suit different call types that remote workers have to complete before being able to progress a call through different stages. This could include health and safety checklists, equipment calibration readings and customer satisfaction surveys. All data that is recorded in a survey or questionnaire is stored in service365.

Signature & Photo Capture

mobile365 provides signature capture functionality for call completion, surveys and checklists. Photographs can be taken throughout the call using the mobile device camera and captured and retained against the call in service365. All signatures and photographs can be stored against a call and embedded in reports and forms that can then be issued to customers as PDF documents.