



ERP Specialists

Sales Management, Job Costing
and Service

Introduction to Unite365

All businesses are reliant on IT systems to improve profitability, workforce utilisation and retain customers. At Xperience, we help customers maximise efficiency through digital transformation. We design solutions for those companies who are struggling with having to use separate systems and want to streamline departments and activities.

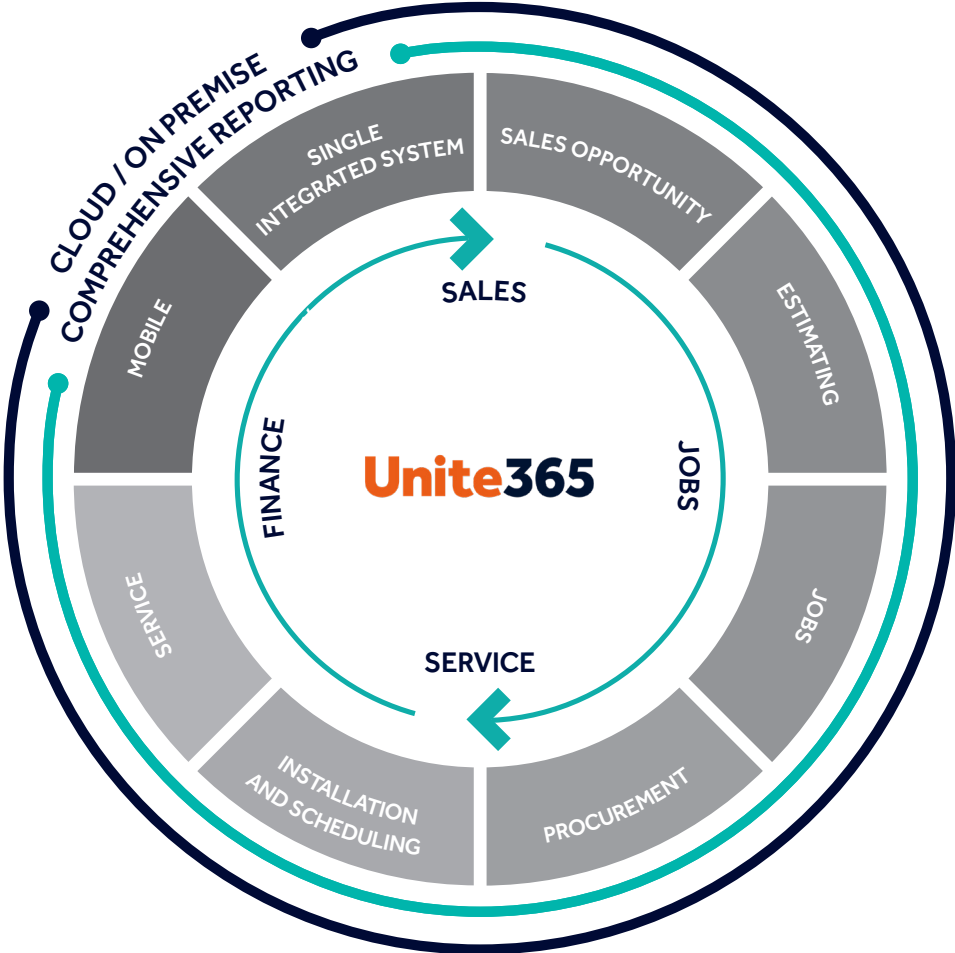
Unite365 does exactly that. It helps eliminate manual processes and unites your team in a single, integrated system, powered by Microsoft Dynamics 365 Business Central.

“A 100%. Wouldn't be without it. It's amazing.”

**David Bailie, Managing Director
BL Group**

Sales, Jobs and Service

Unite365 is a complete end-to-end solution built on Microsoft Dynamics 365 Business Central, covering sales, job costing and service management. It manages every aspect of your business cycle and provides the tools you need to help your business gain greater control, improve margins and drive growth.



Unite365 - Sales Management

Opportunities

Manage your sales pipeline by recording opportunities and creating relevant sales cycles that you want your team to follow. You can easily assess team performance, forecast future work and plan accordingly.

Estimating

Create estimates built up by the materials and labour required for each job. This is based on live stock data, eliminating the need for third party estimating systems or Excel spreadsheets that have to be manually maintained. Mark-ups or margins can be applied to each cost category or item to ensure accurate prices are quoted. Templates can be created for standard items to drive efficiencies in the estimating process.

Quote Management

Quotes can be generated against an opportunity based on an estimate. Multiple versions of the quote can be created to allow for changes and re-pricing where required. Quote documents are output in Word to allow detailed and customised content, specific to each quotation.

Job Creation

If a quotation is successful, this can be dynamically converted to a Job. All details from the quote are converted to the job record including material requirements identified within the estimating process. Quotes can also be appended to an existing Job record if required. During the creation process, revenue options can be managed including phased or cumulative (with retentions) billing.



Unite365 Job Management

Job Records

Maintain all the core job and site information with a live view of job profitability. There is immediate access and drill down into job transactions allowing you to control and manage each job.

Procurement

Unite365 sets the material required for each job from the original estimate. Items can then be allocated from existing stock or ordered through automated purchase order routines. Estimating, inventory and procurement functions are all operating from within the core system with no duplication of data entry. There is clear visibility of the procurement requirement on every job. Purchase invoices can be matched to either purchase orders or purchase receipts. Invoices can be processed by email or scanning if required.

Installation

Installation tasks can be defined against individual job lines. Each task can be sent to the Resource Scheduler where it can be allocated to the appropriate installation resource. Tasks can then be sent to the mobile solution for completion. Tasks are automatically updated as they are completed with the time spent on each task recorded and booked against the job.

Sub-Contractors

Set up and manage sub-contractor records with online HMRC verification. Easily maintain insurance details with the option to set warnings / blocks for expired entries when trying to process transactions. Raise orders to sub-contractors and match these to invoices with the automatic treatment of CIS deductions. Full on-line CIS processing plus sub-contractor statements.

Sales

Jobs can be set to raise invoices as either standard invoicing on a phased basis or on a cumulative basis using applications and certificates. Full retention management is available for jobs that use cumulative invoicing.

Cost Value Reconciliation ("CVR")

All relevant job data is easily displayed allowing users to accrue costs or revenues on a job by job basis. Entries can then be posted to both the job and the general ledger at month end.



Unite365 - Service

Unite365 includes comprehensive service functionality giving our clients the ability to manage service sites, equipment and process planned and reactive service calls. This solution includes a graphical resource scheduler and full mobile capability.

Role Centres

Get immediate access to information and data that is relevant to you and your role for effective call and SLA management. Information is displayed graphically with the ability to drill down to underlying data.

Service Contracts

Maintain all the information needed to manage your service contracts, including site details, equipment, SLA's, planned call schedules, tasks and billing terms.

SLAs

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 from mobile devices.

Service Sites

Record details of all of the sites where service work is carried out, including access details, equipment and planned tasks. A full history of all service work carried out at a site is maintained.

Equipment

Maintain a full equipment register and allocate items to sites and contracts. Detailed 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 region. Calls can then be allocated based on skills and location matching, diary availability and vehicle tracking information.

A black and white photograph of a woman in a white shirt looking upwards at a server rack in a data center. The server racks are filled with cables and components, and the lighting is dramatic, highlighting the woman's face and the structure of the server room.

Service Calls

Raise service calls against contracts, sites and equipment items. Types of calls include planned, reactive, and installation. 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 for different requirements and can be filtered by category and status for easy management. Consolidated call routines allow for tasks to be grouped together ensuring call efficiency.

Van Stock and Replenishment

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

Maintaining a
strong **financial**
future

Optional Additional Modules

To help drive efficiency across your organisation, the following modules are optional and can be included in the Unite365 system.

Document Capture

Purchase invoices, sub-contractor invoices and other transactions can be received electronically or scanned into Unite365. Invoices can then be created electronically, matched against purchase orders or purchase receipts and issued internally for approval before being posted. A copy of the document is stored in Microsoft Dynamics 365 Business Central and can be viewed at any point.

Expense Management

Allows expenses to be completed on a smart phone App or through a web browser and sent directly to Microsoft Dynamics 365 Business Central for approval and posting.

Payroll & HR

Allows full calculation of payroll on costs that can be posted to the contract ledger enabling the accurate recording of labour costs. An HR module also provides additional functionality including absence control, training, disciplinary and recruitment.

Timesheets

Allows timesheets to be entered and then posted directly to the required payroll solution. Timesheets can be entered through a web portal if required.



Unite365 Scheduling

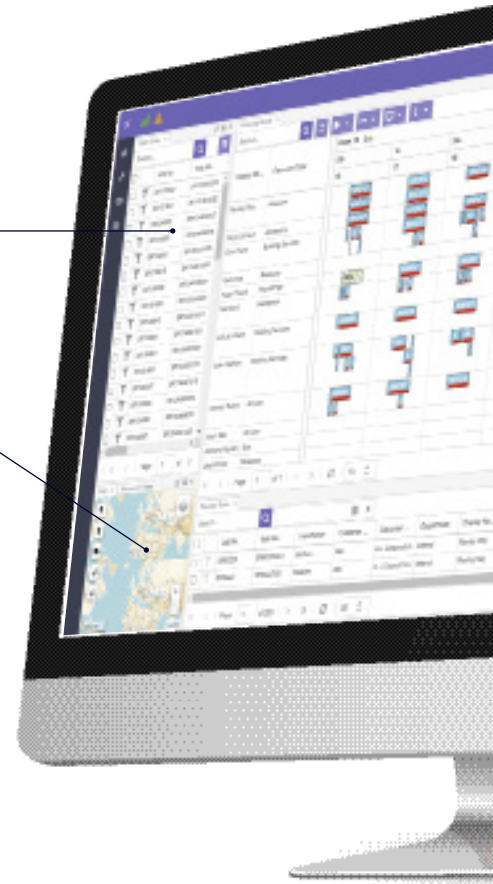
Unite365 includes a powerful graphical resource planning tool, enabling service calls to be sent to the schedule for planning. Planners are able to easily allocate calls, ensuring the right people with the right skills, are at the right place at the right time to meet the client's SLA.

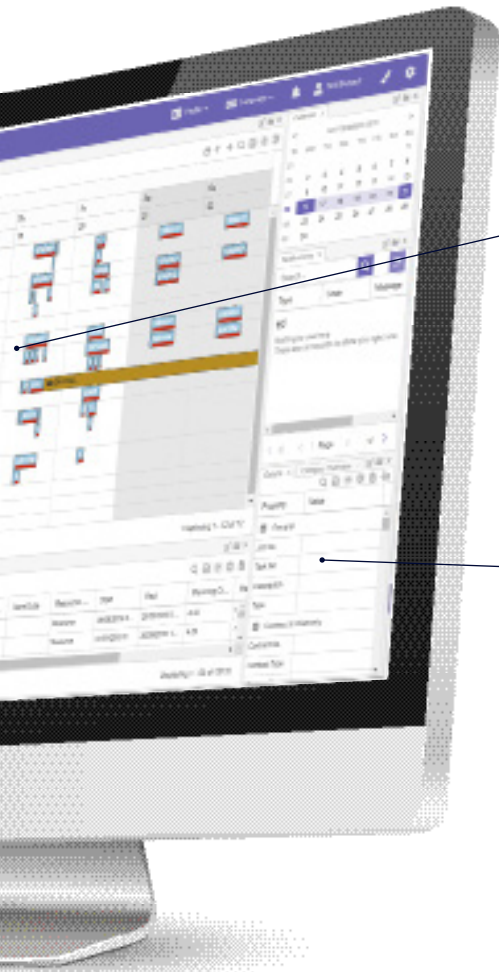
Open Tasks 1

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

Map 2

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





3 Planning Board

The Planning Board displays the workloads of each resource in the selected timeframe, updating progress in realtime. Using 'Drag and Drop' calls can be allocated to or moved between resources.

A clear visual display allows users to differentiate between call types. Calls are updated in the scheduler in real-time to show progress of the call based on data from the engineers mobile.

4 Task View

The task view provides more detailed information on a highlighted service call. From here it is possible to drill down to the call record in Unite365.



Unite365 Mobile App

The mobile app is fully integrated with Unite365 allowing calls to be sent to and completed by field engineers. This eliminates the need for paper-based job sheets, allows real time reporting and speeds up the billing process.

Online / Offline Mode

Remote workers can continue to process calls on their mobile even when they are offline. When the mobile device reconnects it will upload new information to Unite365 and pick up any new calls that have been allocated.

Flexible Workflows

Ensure calls are completed in a timely fashion to the highest standards with configurable workflows. A workflow is a series of pre-defined tasks a worker must complete and ensures service consistency across your workforce.

Surveys/Questionnaires

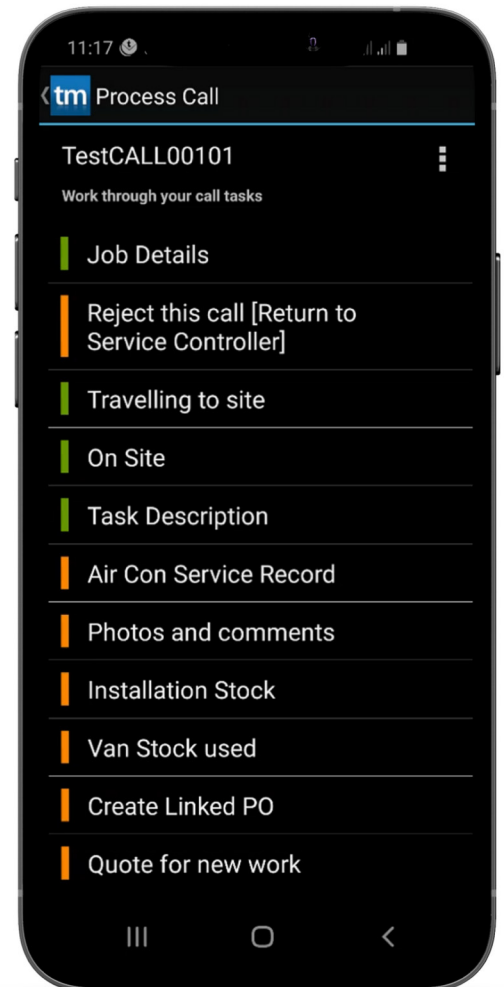
Mandatory surveys and questionnaires can be setup and customised to suit different call types. Define a clear process which ensures a stage must be completed before progressing to the next – ideal for health and safety checklists, risk assessments, equipment calibration readings and customer satisfaction surveys. All data recorded is stored against the call record in Unite365.

Signature & Photo Capture

Photographs and signatures can be taken as part of the call on a mobile device and retained against the call record. They can also be embedded in reports and issued to customers as PDF documents for their own records.

Transaction Processing

The mobile app allows for transactions to be recorded against the service call. This includes issuing van stocks, raising purchase orders and recording timesheet data.



What Makes us Different?

We deliver digital transformation solutions helping our clients to create better, faster processes, build stronger relationships, strengthen data security and accelerate profitability.



ERP software
**DEVELOPED
SPECIFICALLY**
for sales management,
job costing and service
industry



TRANSPARENT
costs and
methodology



95% client
retention rate



Proven
**implementation
methodology**



The team that
designs your
solution, is the
team that deploys
and supports your
solution



Certified for
**Microsoft
Dynamics**



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