

## Service & Helpdesk Management

Enhance  
the quality  
of your service



# Service & Helpdesk Management

Opera II offers a fully integrated end-to-end Service and Helpdesk Management solution, designed to provide contract and equipment management, project processing, billing and full Helpdesk processing, which includes engineer and resource scheduling facilities and an intuitive Knowledge Base.

In conjunction with SPM, Service and Helpdesk Management offers tracking from the original sales opportunity (SPM) and quote through to order, delivery, installation, billing, contract maintenance and servicing. This not only simplifies and improves your business processes but also ensures that you build and retain exceptional relationships with your customers. Helpdesk calls and activities can be logged against individual contacts, contracts, projects and equipment records, and can be charged accordingly and analysed effectively.

PDA's, Tablets, Internet/Intranet web forms and TomTom GPS Telematics can be configured to work with Opera II Helpdesk Management to allow swift entry of information such as time, parts, expenses and customer signatures.

Service and Helpdesk Management integrates seamlessly with other Opera II modules and eliminates the need to run multiple software packages so that you can instantly benefit and improve your processes by having all data stored and utilised in one central location.

## Product highlights

- User-definable fields: create your own customised fields to record information against Company, Contact, Opportunity, Contract, Equipment and Helpdesk records
- Full Helpdesk facilities for logging calls, complaints, change requests, planning preventative maintenance visits and installations, with Knowledge Base functionality
- Engineer and Resource Scheduling including Skills and Service Area matching
- Service Level Agreement (SLA ) Profiles and SLA monitoring
- Fault Code analysis with comprehensive reporting capabilities
- Worksheet Entry for recording and posting time, expenses, parts, consumables and requisitions
- Worksheet, Contract Period Billing and the ability to process Stock Issues and Returns
- Equipment Register with the ability to create model records and import Equipment items from Sales Order Processing/Invoicing, track warranty expiry dates and record third party details
- Add and build up Components against Equipment items, which can be built into Service Kits
- Service Contracts processing with flexible billing periods and items
- Contract Renewal and Warranty Expiry reporting with mail merge facilities
- Integration with Job Costing to allow the calculated cost and revenue to be posted to the relevant Job/Project/Cost Code
- Integration with Pegasus Document Management for capture and retrieval of all Service and Helpdesk related documents

# SERVICE MANAGEMENT

## PROJECT PROCESSING

Description	Start Date	Planned Comp	Actual Comp	Budget	% C.	Calls	Call Ref	Call Comp Due	Owner
Purchase & Receive P...	10/11/2008	12/12/2008	10/9/2008	3000.00	100	0			Kevin McAlder
Arrange Airline & S...	10/12/2008	20/12/2008		30.00	0	1	1043	21/12/2009	Kevin McAlder
Log 5 m's & Setup	10/12/2008	20/12/2008		0.00	0	0			Kevin McAlder
Arrange Flight with...	20/12/2008	22/12/2008		0.00	0	0			Kevin McAlder

Won Sales Opportunities can be progressed from SPM through to Service Management as Installation Projects, in order to plan and control staff and engineers working on the implementation of the project. Phases can be built up and updated with timescales and budgets, in order to plan design time, groundwork, preparation, installation, workshop hours, training and so on.

Helpdesk Calls, Activities, Quotes and History entries can be created and stored against the relevant Projects

and customised fields can be populated from the Opportunity. Costs and charges that build up against Projects can be viewed instantly through Project Cost reports, giving full visibility and control of every opportunity, all the way through to acquisition and installation.

## SERVICE CONTRACTS AND BILLING

The Service Contracts Processing facility enables you to maintain a full service history and record of all contracts. Contracts can cover multiple pieces of equipment if required and can have Helpdesk Calls, Visits and Activities associated with them. Flexible billing and routines enable easy auditing and posting of documents to Sales Order Processing/Invoicing, ready to be progressed to invoice.

- Contracts can be SLA-specific and can cover multiple items of equipment if required.
- Create custom fields for recording contract-specific information, which can also be analysed.
- Flexible billing periods and items can be created using a simple Wizard, and can be based either on the full or a pro rata contract value.
- Preventative maintenance visits can be planned and scheduled against a Contract.
- Activities (both chargeable and free of charge) such as Site Visits and Helpdesk Calls can be associated with a Contract, recording time and resources for analysis.
- Chargeable Activities can be individually or batch posted as Documents to Sales Order Processing/Invoicing for invoicing. Cost and revenue analysis details can also be added to automatically update the relevant Job/Project/ Cost Code in Job Costing.
- Contract renewals can be easily managed and processed accordingly using integration with MS Word and simple mail merge routines.
- Contract Costing reports instantly provide analysis of contract costs and charges.
- Any documents, e-mails and correspondence relating to a Contract can be easily attached.

Service Contracts Processing: CONT001: AHL0001: Abington Hire Limited

Contract No.: CONT001  Inactive Contract

Description: Monthly Contract on Unit 1

Contact: Roger Davies - Abington Hire Limited  
00000005 - Abington Hire Limited  
Orion Way  
Kettering  
Northants  
NN15 5PD  
Tel: 01536 496003 Fax: 01536 496003  
Email: roger@abington.co.uk

Value & Renewal  
Start Date: 01/07/2009  
Renewal Date: 01/12/2009  
Using Renewal Date  
Multiplier: 12.00  
Period Value: 810.00  
Contract Value: 810.00

Customer Ref.: PO1003277  
Site Address:  
Site Post Code:  
Site Cont / Tel:  
Access Times:  
Special Instructions  
Cleaning of Office Unit Only

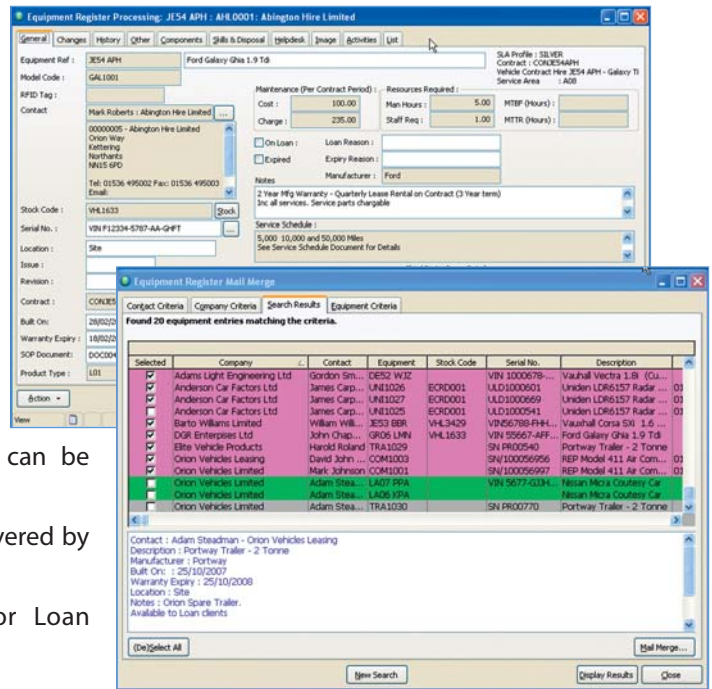
Schedule  
Monthly Grand Rental  
Customer responsible for all other costs.  
Cleaning billed monthly with Rent.  
Telephone / Electricity billed separately via Worksheets.

Current Contract Period: 20  
Start: 01/09/2009 SLA Profile: STD  
End: 30/09/2009 Current Contract Period Due: 30/09/2009

## EQUIPMENT REGISTER

Create and maintain an Equipment Register which can contain serialised items. Equipment Items can be assigned to an Owner and covered by a Contract, building a full record of previous Owners, Service History, Components, and Skills and Disposal requirements. Third party details can be recorded, Built On and Warranty Expiry dates can be effectively tracked, and costs and charges associated with each Equipment Item can be analysed.

- Equipment Items can be imported from Sales Order Processing/Invoicing once they have been delivered, including traceable Items.
- Equipment records can be associated with serial numbers and linked back to the original SOP/Invoicing document.
- Equipment records can be based on a Model record, automatically inheriting all Components and History associated with the Model.
- Custom fields can be created to record additional information against Equipment records, which can be reported on and analysed.
- Complete service history for Equipment Items covered by contracts can be transferred to new Owners.
- Warranty tracking and third party details for Loan Equipment can be recorded.
- Costs and charges associated with Equipment items can be analysed.



## HELPDESK MANAGEMENT

With Opera II Helpdesk Management calls can be logged against companies, individual site addresses and contacts, and linked back to the relevant Contract and Equipment item, tracking calls through to resolution. The Helpdesk provides a central point for recording calls, problems and complaints, change requests, installations and preventative maintenance visits. Activities, Notes and Documents can be associated with each call. Helpdesk Management also offers the ability to build and use a Knowledge Base, in order to aid swift resolution of future issues.

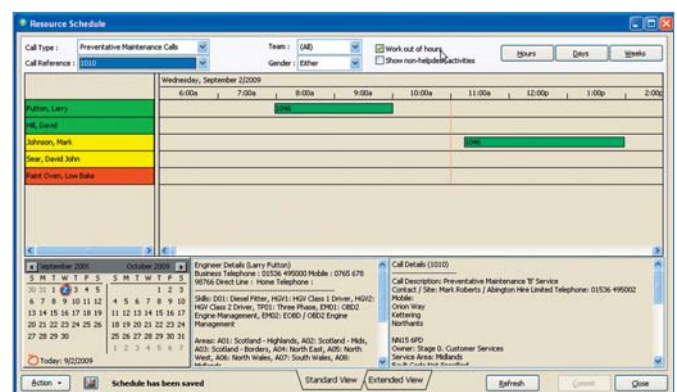
## RESOURCE SCHEDULER

An intuitive Resource Scheduler provided with Helpdesk Management allows for complex planning of engineers, staff and other resources, enabling efficient allocation.

The planning board provides control over which call types, resource teams and dates are presented, with intelligent Skills Groups and Service Area matching, ensuring that the correct person is assigned to the job.

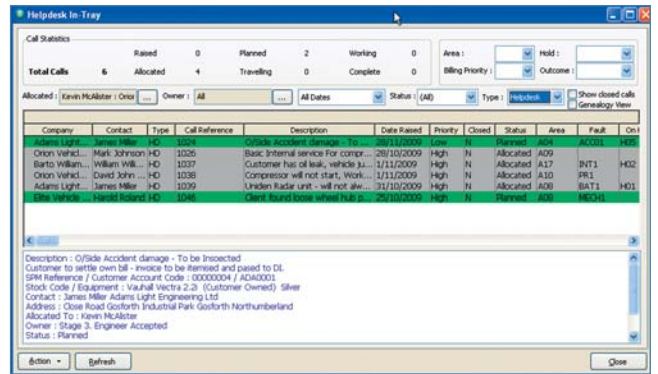
Rooms, machines, workshop space and so on can be allocated, with clear visibility showing exactly what resources are free at the required time.

Amendments to the schedule can be easily made using drag-and-drop and will automatically create Activities and Diary entries for the allocated personnel, against the Helpdesk call and in any Task lists.



## HELPDESK HIGHLIGHTS

- PDAs, Tablets, Internet/Intranet web forms and TomTom GPS Telematics can be configured to work with Opera II Helpdesk Management to allow swift entry of information such as time, parts, expenses and customer signatures.
- Create custom fields to record additional call information, which can then be analysed.
- Engineer and Resource Scheduling enables staff and other resources to be effectively allocated to jobs, with optional Skills and Service Area matching for accuracy.
- Call sheets can be printed for engineers heading out on site.
- Worksheets for chargeable and free of charge time, parts, expenses and requisitions carried out in relation to the call can be entered and then posted as Documents to SOP/Invoicing, ready to be invoiced.
- Optional integration with Opera II Job Costing allows cost and revenue analysis details to be assigned to Worksheet Entries, to update the relevant Job/Project and Cost Codes.
- Chargeable work can be billed to the customer or reseller specified.
- Replacement parts can be moved out of Stock and issued, or returned into Stock, or scrapped.
- A call can be progressed through the following stages: **Raised, Allocated, Planned, Travel, Working** and **Completed**.
- Calls can also be progressed through user-defined stages and allocated to the relevant Owner as required
- Available Call Types: Helpdesk Call, Change Request, Installation Call and Preventative Maintenance
- A flexible Helpdesk structure can handle Contracts and serialised Equipment items relating to calls and ad-hoc minimal information 'Pay As You Go' type work.
- SLAs can be assigned per customer if required, with available SLA Monitoring, Fault Code, Call Cost and Charge Analysis.
- Optional integration with MS Outlook and Word for letters, emails and mail merges such as Helpdesk Confirmations and Feedback forms.
- Integration with Pegasus Document Management allows any related documents to be stored against a Call.



## SERVICE AND HELPDESK MANAGEMENT INTEGRATION WITH DOCUMENT MANAGEMENT

Service and Helpdesk Management integrates seamlessly with Pegasus Document Management, enabling innovative management and electronic storage of any relevant Service and Helpdesk documents such as contract related documentation, terms and conditions, equipment specifications, instructions, site visit reports, worksheets and so on. All documents can be stored and archived securely in a central location, which will save time, free up space, reduce costs and paper waste, and make office procedures much more efficient.



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