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Why Upgrade?

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Key benefits for upgrading to Service Centre five

Service Centre five new 'Look & Feel'

Developed using Microsoft.Net technology, Service Centre five is a browser based product supporting a range of databases and allowing for a 'zero footprint client'. Running on an IIS server the system also supports remote communications via the Internet.

Modules have been developed to allow technicians to dispatch & complete service calls remotely together with parts usage & signature capture while customers can log & monitor their service calls.

A range of API's have also been developed enabling customers to integrate Tesseract to other systems using XML.

Functionality includes:

- **Asset tracking & configuration control with serial/asset numbers & full audit trail.**
- **Contract Administration with SLA, billing, warranty control & third party support.**
- **Meter billing; usage, minimum & block together with consumables.**
- **Service call logging with diary, SLA escalation & full audit trail.**
- **Engineer dispatch with job update, parts usage & job invoicing.**
- **Logistics control for warehouse and van, both repairable & disposal parts.**
- **Sales Tracking System with Remote Access for salesmen.**
  Generation of sales, service or contract quotations using simple wizard.

System Navigation

System Navigation is based around the **user interface menu** in the left pane, the control links (submit, print, clear, help and delete), are conveniently along the top of the pane.

Hidden detail or Roll-up Text is normally identified by text in a shaded box as below.

Customer Details

e.g. contract page.

The text, being relevant to the operation is hiding more detail. By clicking the text, details can be turned on and off allowing for uncluttered pages, only being turned on if the details are required. For an example, in Service Centre five click contract then click contract add. With the text being boxed (default) the customer details are hidden. By clicking the text the customer details are displayed.

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List Pages

The List Page, instead of being a continuous list that requires the use of a scroll bar, it is displayed in pages. This list also applies to the list shown when clicking a pick-list.

The column header (shaded) can be clicked to sort that column alphabetically. These pages are configurable to display the quantity of lines per page and display the total records. Any column selected can also sort this list.

The next page can be selected by clicking the page number at the bottom of the list page. If a site is chosen from the list (a single click), that site will be displayed in site modify page.

Pick-List

Like the List Page, instead of being a continuous list that requires the use of a scroll bar, it is displayed in pages.

Site Contact – 'Opt In Flag'

The Opt-In tick box will allow the user to identify the email address as an address that is able to accept mail shots, advertising etc.

It is used for reporting only and does not have any other functionality within the system.

Contract 'Product Population'

Product Population of Serialised Products: To activate this function an activation check box in the serialised product status needs to be checked on. This will allow the user to activate/deactivate a serialised product and increase/reduce the product population of the customer contract accordingly. The serialised status start and end dates have no bearing on the product population calculation.

Contract Charge 'Standard Contract'

Contract Charges: New functionality to Contracts to permit an unlimited number of additional charges. Contract Charges take the Sale End price of chargeable parts only and are added as an extra invoice line after the MMC during the Customer Contract Invoicing run, and as an extra line after the Meter Billing lines during the Meter Billing Invoicing run. The Contract Charges share the same invoice date and cycle as the meter billing next invoice date and cycle. Should a Contract not contain any Meter details, i.e. a non-metered Contract, the Contract Charge will be invoiced against the maintenance charge next invoice date and cycle.

Contract Charge 'Meter Usage'

The Meter Billing Contract Charges share the same invoice date and cycle as the meter billing next invoice date and cycle. For a Meter Billing Contract, where a Meter Billing Invoice is due but there is nothing to invoice, the Contract Charge will not be invoiced either.

Contract Charge; For Usage Meter Billing, it is possible to apply the Contract Charge to all or one of the Price Bands. To apply the same Contract Charge to several, but not all, of the Price Bands then a Contract Charge will need to be created for each Price Band. These rates can be pulled through from the Part (Chargeable Part). Also refer to page 9.

The Net Value of the Contract Charge is calculated by the Contract Charge Rate % of the Meter Bill. For example, if the Net Value of the Meter Bill is £27.5 and the Contract Charge attached has a rate % of 20 then the Contract Charge will be £5.5 (20% of £27.5).

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Contract Charge 'Minimum Meter Billing'

The Meter Billing Contract Charges share the same invoice date and cycle as the meter billing next invoice date and cycle. For a Meter Billing Contract, where a Meter Billing Invoice is due but there is nothing to invoice, the Contract Charge will not be invoice either.

Contract Charge; For Minimum Meter Billing, a Rate % can be entered for the minimum rate charge. An Excess % Rate can be entered for the excess rate charge. These rates can be pulled through from the Part (Chargeable Part).

The Net Value of the Contract Charge is calculated by the Contract Charge Rate % of the Meter Bill. For example, if the Net Value of the Meter Bill is £27.5 and the Contract Charge attached has a rate % of 20 then the Contract Charge will be £5.5 (20% of £27.5). The same applies to the Excess.

Supplier Contract

Every time a Supplier Contract is renewed the user will change the Renewal Start Date rather than change the Start Date. This way the user can still see when the Supplier Contract was originally created as the original start date will be preserved.

When generating a PO the system will use the Renewal Start date if one exists rather then using the Supp Cont Start date when creating PO Lines for any serialised products. If the Supplier Contract doesn't have a renewal date then system will use the Supplier Contract Start Date.

When Renewing a Supplier Contract the system will no longer update the Contract Start date on the related Serialised Products, the Start date will show when the Supplier Contract first started for the Serialised Product. However when generating a PO if a Renewal Start date exists in the Supplier Contract this will be used rather then the Start date in the Serialised Product record.

Payment Cycle: To capture the payment cycle for the supplier contract. This will follow the value and unit standard as per the existing charge cycle field, e.g. a quarterly payment cycle will be entered as a value of 3 and a unit of months.

Contract Duration: To hold the contract duration; The value of the contract duration will be used to calculate the contract termination date from the contract start date.

PO Type - Details or Consolidated: Refer to generate PO over the page.

Charge: Click the maintenance change unit option, Daily, Weekly, Monthly or Yearly (how much per day, week, month or year). Special consideration must be taken when updating the maintenance charge on the serialised products. If the supplier contract purchase order type is set to "detailed" then the supplier contract maintenance charge will be divided among the related serialised products.

Supplier Contract 'Product Population'

The Prod Pop (Product Population) field holds the product population value for the supplier contract. The field will display the count of the number of active serialised products that are attached to the supplier contract. To activate this function an activation check box in the serialised product status needs to be checked on.

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Supplier Contract 'Generate PO'

From the Supplier Contract query or modify pages a Purchase Order can be generated to fulfil the order. The Supplier Contract must have a start and end date and have a Serialised Product attached. The Serialised Product Supplier Contract charge must match the Supplier Contract charge and cycle.

PO Generate creates a PO Header using the Supplier Contract for all the Serialised Products against this Supplier Contract. It will also generate PO Lines for the Supplier Maintenance Charge (e.g. SUPPCONTMONTHLY0000) with the relevant Supplier Contract details.

In addition a new Purchase Order Type field will be added to the supplier contract. The purchase order type can be either "Detailed" or "Consolidated"; if the "Detailed" option is selected the system will create one purchase order line for each serialised product attached to the contract (this is how the system currently works.) If the "Consolidated" option is selected the system will create one purchase order line for all the serialised products on the contract.

Supplier Contract 'Renewal'

From the Supplier Contract modify page (query the supplier contract) click the **Renewal** link in the **user interface menu** on the left. If an outstanding PO is present the renewal will provide a warning. If so run PO Goods In on the relevant PO and run **Renewal** again.

Supplier contract renewal function allows the user to change information in the supplier contract and have those changes reflected in all the serialised products attached to the contract.

Call Add

Call logging has changed. Instead of the Call Details text at the bottom of each page you now submit between pages. Submit the call header page, complete the call details and submit, submit the call confirmation details.

Call Type

The 'Schedule in Diary' if ticked on, will generate a Diary Entry ID. If not ticked on a diary entry can be created later.

Invoice Incomplete Calls. If this flag is ticked on in the Call Type this will allow for calls in an outstanding status to be invoiced (status other than COMP). With this flag ticked off only COMP calls can be invoiced.

Call Add 'Schedule in Diary'

In the Call Confirmation page the 'Schedule in Diary' if ticked on, will generate a Diary Entry ID. If not ticked on a diary entry can be created later.

The "View Diary After Saving" checkbox on Call Add/Modify pages can be set. When Schedule in Diary is checked on the View Diary After Saving will also be checked on allowing the system to launch the Diary upon submit.

Call Add 'Checklist'

At the bottom of the Call Details page at Call Entry time, Call Service check list will be displayed to provide a list of questions, unique to this Call Type and Product Family. They require, Yes/No, Numeric Integer, decimal, date or text answers. The questions can be made mandatory or left optional.

The Functions Sub Module Number against the 'Question by Call Type' dictates where these questions will appear. For example, in the Call entry confirmation page, or in the Service Report confirmation page.

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Call Modify 'Change Site Details'

The Site can be changed on the Call Modify page providing the Call is still in an OPEN status. Changing to a new existing Site will populate the Site Name, Address details in full but only the Contact and telephone details if these are null. All of these fields will be left open for manual modification.

Task List Closedown

Tasks in Call Handling allow for the scheduling of concurrent or sequential events. It will provide the control for any scheduled or allocated Calls - the source of the Diary display.

If many Tasks have been created or generated they can be closed down allowing the user to complete the chosen tasks and add the work hours in to the Task Work Time field.

Escalation Monitor 'Tool-tip'

'Tool-tip' has been added to show the problem description when 'hovering over' a call in the single & multi escalation monitor in call control.

Call Handling 'Billable Batch Update'

Currently if users need to change the billable status of a call or Service Report (SR) they have to manually update the billable flag in each individual Field Service Report Line (SRL). In most cases the entire call or an individual FSR is either billable or non-billable so having to do each line one by one is very time consuming when you have multiple SR's with multiple SRL's.

Billable batch Update allows the user to set the billable flag on/off for all uninvoiced field service report lines (SRL) that relate to a specific call/repair job or specific field service report (SR).

Call Action Code

Call Action Code (found under Call Handling, Call Notes) now has a Type flag of Internal or External and a Send Email tick box.

Refer to Helpdesk Call Action over the page.

Helpdesk Call Action

When logging a call in the helpdesk environment, the call details will contain the logged in Users department code.

Submitting the call will display the call confirmation page. The Update Call flag is automatically ticked due to the Department Code being present. If the Call Update is un-ticked then the Call Actions will NOT display.

After submitting the call confirmation the Call Actions page appears waiting for further information. An Action Code is required which determines whether the next action is internal or external and if external whether and email is sent to the call email address.

If Initial Response is setup for this customer contract cover or default cover then an additional tick box can be checked for Customer Contacted. Once ticked the initial response is met and the contracted response kicks in.

An Activity Code can be selected and an Attachment can be attached.

Notes must be entered against this Call Action.

The Site and Product details are hidden (**hidden detail text boxes** are normally displayed as boxed text. Detail is hidden when the text box is displayed, once clicked the hidden detail is displayed. Click the text box to switch on and off).

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Call Diary

The Call Diary is an appointment-based browser showing tasks/calls and unavailability of engineers.

It displays Engineer's Shifts and auto-calculation of travel time based upon the location of the Engineer and the location of the appointment, using Microsoft MapPoint 2006. (Please note that the time scheduling element that uses Map Point this is not included as standard with Service Centre five. Please call Tesseract Support for more information).

Diary Entries can be created for the Call Diary via Calls (as Diary appointments), via Tasks (as Diary appointments), or via the Diary. Via the Diary they are created as unavailable or appointments; neither is linked to Calls or Tasks.

Diary Entries for Calls or Tasks can be generated via the Call Confirmation page using the 'Schedule in Diary' flag.

Diary Entries for unavailable or appointments are created via the Diary link in the Call Control **user interface menu** or the Call Handling **user interface menu** (if not linked to a call).

The availability search allows the user to search for employee availability by date range, time of day, appointment duration and days of week. Once submitted a list a date and times slots are listed. The user can select the most relevant for that employee and customer.

Appointment Diary Entries represent actual appointments in the Diary and are usually scheduled with accompanying travel Entries.

An Appointment is representative of a Site Visit (i.e. someone has to attend an appointment at a specific location).

The Diary View style **'Multi-Employee / 1 Day'** would be chosen if there is no Engineer specified against the Task (which in turn would have been pulled through from an Engineer selected in the parent Call). This appointment would be listed in Unallocated date Range view and shown along the top of **'Multi-Employee / Date range'** view. This view shows a summary of Appointments for multiple Employees over a given date range. This is probably the most useful view when trying to balance Appointments across Employees.

This view differs from the others in that each calendar entry shows a count of the number of Appointment/Unavailability Entries on each date (if greater than zero).

Single Employee / Date Range – This loads the calendar view with Appointments for a single Employee over a specified date range. When selected, the Date Range from and to fields must be filled in, and a single Employee must be selected.

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Shift Pattern

Employee Shift Pattern is a repeatable block of working hours over a set number of days that only needs to be defined once but is automatically repeated across a range of actual dates.

Shift Patterns are recommended when using the Service Centre five Call Diary.

Before an Employee Shift Pattern can be created a Shift Pattern Type must be created a Shift Pattern Day must be created and a Shift Pattern must be created (see below).

The **shift pattern** type categorises the type of shift pattern. It is used in the actual Shift Pattern set-up. For example, shift pattern type 1 could be the Standard Engineer Shift Pattern.

The **shift pattern** day categorises the type of day for the Shift Pattern. It is used in the actual shift pattern set-up, for example, D represents a Day shift, N represents a night shift, O represents a day off and B could represents a Bank Holiday and so on. A Shift Pattern Day, for example B will be used in conjunction with Holiday Dates when setting up a Shift Pattern.

Each day will have a start time and duration.

The **shift pattern** is where a rota of shift days are created against a shift pattern type, a Holiday date, if required and unique shift pattern days (shift pattern days are created for each shift pattern). The user can add shift pattern days as they create the shift pattern.

Employee Shift pattern is where a Shift Pattern is linked to an Engineer or Employee.

Escalation Template

Escalation Template allows a call to be escalated via emails to various levels of authority during its life, if responses are not met.

Escalation table holds a list of all email addresses, the time in which the email is meant to be sent and what type of Escalation it is, that are meant to be sent during the life of the call.

Escalation Type

This table contains a description of what Escalation is taking place e.g. Logging of call, 25% of SLA expired etc. Whether it is a Fixed time allocation or a Percentage of the SLA, and the unit of measure to look at the amount of time lapsed.

In the example below, the time type is cover, the response type is response time and calculated from is in date, then if 75% of time is reached calculated from the in date time to the response time based on the cover code response then an email will be sent to the email address stored in the Escalation Table ‘SCEscalation’.

Escalation Template

This table holds all the details of the above table, matching up the Call Type, the Field which is to be looked up (Field Engineer, Site, Customer) and the number – if no number is stated the procedure will look at the Site or Customer or Engineer currently assigned to the call.

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Service Report ‘Parts Request Exists’

When submitting a service report a message will pop-up if a parts request exists for this call.

Service Report Lines ‘Enable Part Pricing’

When adding a service report line with System Set-up Key ‘Enable Part Pricing Based On Customer Type’, set to **Yes** the part price is the price depending on the Customer Type and Part Type. If the customer type is End User then the price will be taken from the Part Repair End User Price field on a Repairable Part and Sales End User Price on a Disposable Part and so on.

With this System Set-up Key ‘Enable Part Pricing Based On Customer Type’, set to **No** only the Repair (R Part) or Sales (D Part) End User Price is used regardless of customer type.

This also applies to REA Service Report Lines and Task Lines.

Service Report Lines ‘Delete Related SRL’s’

Service Report Lines (SRL or FSRL) can be deleted individually, however if there are many SRL’s and the whole Service Report is to be removed this is time consuming. A System Set-up Key (FSR: Delete Related SRL’s when Deleting FSR Record, set to Yes) can be set to automatically remove all SRL’s linked to a service report (SR or FSR). This checks to confirm SRL’s have not been Invoiced.

Knowledge Base

Empowering the helpdesk

With the combination of legacy systems and new technologies managing knowledge and solutions, the IT helpdesk has never been more challenging. However, help is on hand with Universal, a state of the art knowledge management tool. Using sophisticated natural language, neural engine functionality plus integration with comprehensive technical packs from RightAnswers Universal provides the right answer fast.

Typically IT helpdesk have benefitted in the following ways:

- **Reduced call escalations from first line to second line**
- **Improved rate of first contact call resolutions**
- **Reduced call durations**
- **Reduced number of calls**

Empowering the call centre

Call centres are increasingly under pressure to provide an accurate, consistent and personalised service to customers – seemingly disparate objectives! However, Universal can help provide just this service by connecting the customer/call centre operator with the right answer quickly and efficiently using a variety of interfaces.

By implementing self-help to customers and a search engine on a call centre the typical call centre can expect to gain significant efficiency and cost savings in the following areas:

- **Improved rate of first contact call resolutions and accuracy of information provided**
- **Reduced call durations**
- **Reduced number of calls if self service is implemented**
- **Decreased training time**
- **Faster deployment of corporate information**
- **Genuine dynamic FAQs for fast access to common solutions.**

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Part 'Charge Rate and Excess %'

The Part Charge Rate % is used in Contract Charges for Usage and Block Meter Billing Contracts. The Part Charge Rate Excess % is used in Contract Charges for Minimum Meter Billing Contracts. These Rate % are pulled through to Contract Charges for Meter Billing Contracts. Refer to page 2.

Kit Component

A kit component can be set-up which lists mandatory and optional parts against a product number. This kit component will require a manufacturer, model and type which in the first case are free text input.

Once this manufacturer kit is selected in parts request, kit configurator, it cannot be created again in kit component.

Kit Configurator

A kit configurator can be set-up which lists mandatory and optional parts against a product number. This kit configurator will show the manufacturer, model and type from the kit component. Once this kit is selected in a valid parts request it will generate parts request lines and allocate where stock exists.

Sales Person Next Actions

When entering Prospect Centre the main Prospect Centre page appears, as above.

By attaching the employee number to the User login ID when entering Prospect Centre the main Prospect Centre the Sales Person Next Action page appears, as below. The employee can be changed if required and submitting this action a list of sales opportunities will be displayed.

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TRADEMARKS

References

Documents supplied with the Service Centre five Software

Service Centre five Release Notes

Service Centre five Installation Guide

Service Centre five Administrators Guide

Service Centre five System Guide

Service Centre five Licence (Registration)

Service Centre five Online Help

Remote Engineer Access Online Help

Remote Customer Access Online Help

Documents supplied with the Service Centre five User Training

Service Centre five Training Catalogue

Service Centre five Reference Guides (refer to the Getting Started Reference Guide, Tesseract Training Services for a list of Standard Course and Online Instructor led Tutorial Names and Codes).

Documents supplied by Sales and Support

Service Centre five Sales Brochures

SupportNews - Your monthly update from your service management software provider. Go to www.tesseract.co.uk for more information.

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