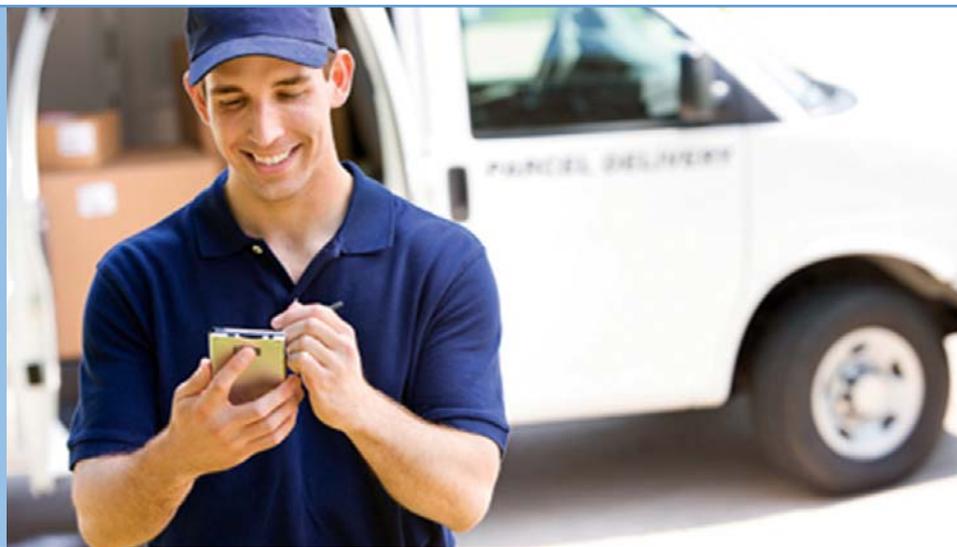




Opera

Service & Helpdesk Management

Enhance
the quality
of your service



Service & Helpdesk Management

Pegasus offers a fully integrated, end-to-end Service & 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 the CRM application, Service & Helpdesk Management offers tracking from the original sales opportunity (CRM) 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 Helpdesk Management to allow swift entry of information such as time, parts, expenses and customer signatures.

Service & Helpdesk Management integrates seamlessly with other Opera 3 and Opera II applications and eliminates the need to run multiple software packages so that you can instantly benefit and improve your processes by having all your 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 and 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 documents related to Service and Helpdesk

SERVICE MANAGEMENT

PROJECT PROCESSING

Description	Start Date	Planned Comp	Actual Comp	Budget	% C.	Calls	Call Ref	Call Comp Due	Owner
Purchase & Recv Ph...	20/11/2008	19/12/2008	19/9/2009	3000.00	100	0			Kevin McAlester
Arrange Airtime & S...	10/12/2008	20/12/2008		30.00	0	1	1049	21/12/2009	Kevin McAlester
Log S.no's & Setup	10/12/2008	20/12/2008		0.00	0	0			Kevin McAlester
Arrange Fitment wit...	20/12/2008	22/12/2008		0.00	0	0			Kevin McAlester

Won Sales Opportunities can be progressed from CRM 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

Service Contracts Processing enables you to maintain a record and full service history 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 make it easy to audit and post 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 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.

Contract No.: COM1001 [Inactive Contract] Customer Ref.: PO1003277

Description: Monthly Contract on Unit 1

Contract: Roger Davies - Abington Hire Limited
 00000005 - Abington Hire Limited
 Orion Way
 Kettering
 Northants
 NN15 6PD
 Tel: 01536 495002 Fax: 01536 495003
 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

Resource Requirements:
 Man Hours: []
 Staff Req: []

Service Area: ADB Midlands
 Billing Priority: 1 Kettering Head Office
 Owner: Kevin McAlester - Orion Vehicles Limit
 Require Purchase Order on Helpdesk Call

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

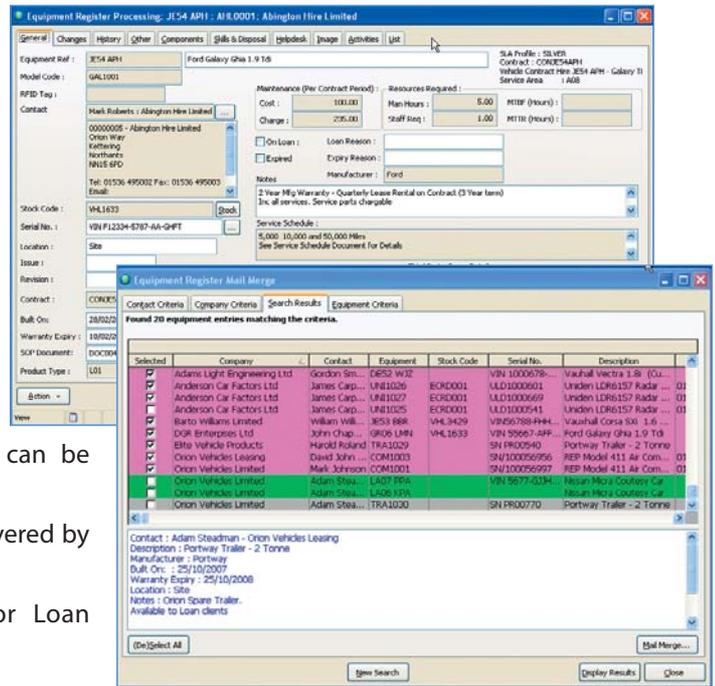
Special Instructions:
 Cleaning of Office Unit Only

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

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 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, to help resolve future issues more quickly.

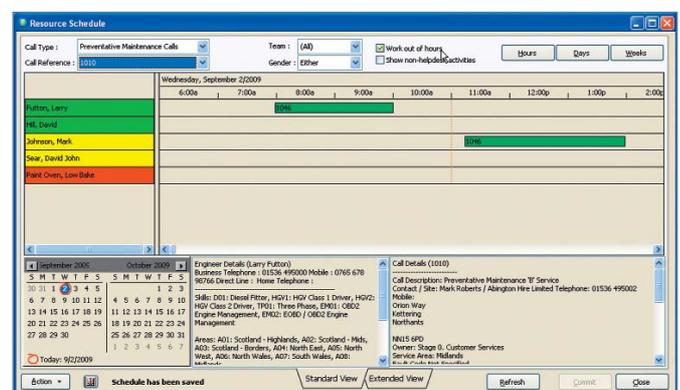
RESOURCE SCHEDULER

The Resource Scheduler provided with Helpdesk Management allows for complex planning of engineers, staff and other resources, so they can be allocated efficiently.

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.

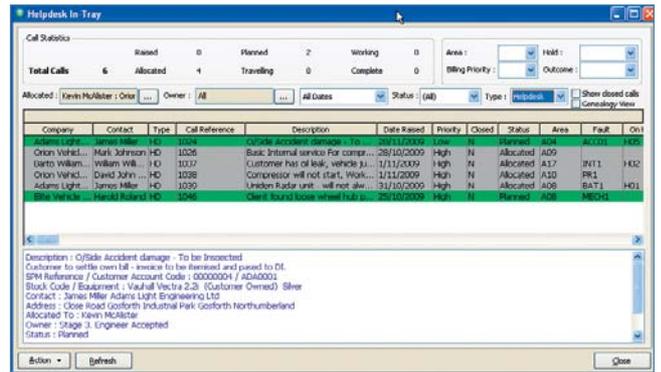
Rooms, machines, workshop space and so on can be allocated, with clear visibility showing exactly what resources are free at the required time.

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 Helpdesk Management so that information such as time, parts, expenses and customer signatures can be entered quickly.
- Create custom fields to record additional call information, which can then be analysed.
- With Engineer and Resource Scheduling, staff and other resources can be 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 3 and 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, e-mails 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 & HELPDESK MANAGEMENT INTEGRATION WITH DOCUMENT MANAGEMENT

Service & Helpdesk Management integrates seamlessly with Pegasus Document Management, enabling electronic storage of 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 storage space, reduce costs and paper waste, and make office procedures much more efficient.



Pegasus Software, an Infor™ company Orion House, Orion Way, Kettering NN15 6PE
T: +44 (0)1536 495000 **F:** +44 (0)1536 495001 **E:** info@pegasus.co.uk www.pegasus.co.uk