



# Service & Helpdesk Management

Enhance the quality of your service



# Service Management

Part of the Opera II CRM suite of modules, Service Management is designed to maintain and renew maintenance contracts with customers. Working with Opera II Sales Pipeline Management (SPM) and Sales Order Processing (SOP), Service Management can provide end-to-end service and maintenance management, from Quote and Order through to Delivery, Installation, Contract, Service, Breakdown and Billing. The contract information includes value, equipment covered, billing periods and renewal date. You can also log activities such as site visits and helpdesk calls against a contract, so that you have a complete picture of the contract, all in one place.

## Product highlights

- Service Level Agreement (SLA) call monitoring plus engineer and resource scheduling
- Skills Matching, Service Areas and Fault Analysis, with comprehensive reporting capability
- Contracts, Period Renewal Billing, Pro Rata Charging, Planned and Preventative Maintenance
- Equipment (Assets) Components, Variable Service Types, Warranty and Loan Equipment
- Time, Expense and Parts Recording and Billing.
- Installation Projects and Scheduling
- User-defined fields: add your own data and terminology to key forms
- Complaints, Problems, Change Requests: full Helpdesk and knowledge base

## PROJECT PROCESSING

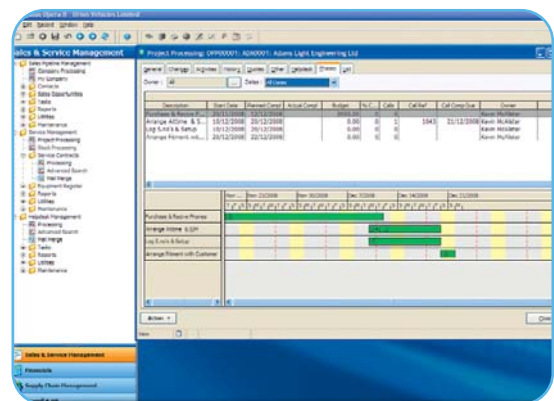
With Project Processing you can progress sales opportunities from SPM to an installation project in Service Management. Project Processing is used to plan and track engineers working on the delivery and installation of items sold.

The project can contain different phases such as design, preparation, groundwork, installation and so on. Each phase can be given a timescale and budget and have Helpdesk calls assigned to it. You therefore have full visibility and control over every sales opportunity or prospect and can track their progress right through to acquisition and installation.

## SERVICE CONTRACTS AND BILLING

With Service Contracts and Billing you can maintain a record of your service contracts with your customers. All calls, visits and equipment used are logged against each contract. Service contracts can be invoiced and documents posted to Opera II.

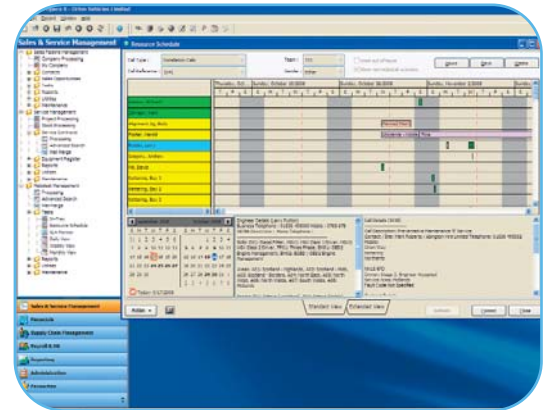
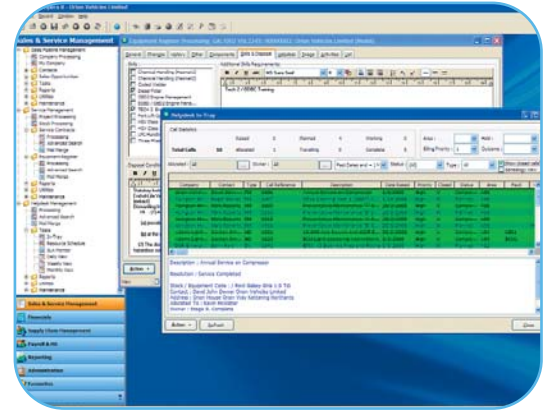
- Sales Opportunities can be converted to installation contracts
- Contracts include Service Level Agreements (SLAs), contract values and multiple equipment items and renewal dates
- Documents and e-mails relating to a contract can be attached to it
- Activities such as site visits and helpdesk calls can be logged against a contract. Activities can be chargeable or free of charge
- Preventative Maintenance Schedules can be maintained against a contract
- Profit analysis of a contract and its Periods
- Invoices can be calculated on the full contract value or based on a pro rata value.
- Invoices for chargeable items and time can be batch-posted in the Invoicing or SOP modules.
- Time taken can be recorded against an activity, allowing time analysis
- Renewals are processed to SOP
- Integration with MS Word®
- Flexible billing periods
- Contracts can comprise single or multiple items



## EQUIPMENT REGISTER

Maintains a register of individual products that are covered by service contracts to enhance equipment reliability and availability. It also enables the tracking of components exchanged on-site and generates relevant stock transactions.

- Complete service history for products on maintenance contracts
- Product records can be associated with Asset code serial number, original customer invoice number and/or delivery note number
- Maintain a bill of materials for individual product records detailing serial numbers of sub-assemblies, version, bug and fix information and components
- Maintain components within the bill of materials following maintenance or repair visits by recording the new serial numbers of replaced components
- Replacement components can be moved out of stock and returned components moved into stock or scrapped
- Cost analysis of component exchanges
- Warranty Tracking and Loan equipment
- Equipment can be based on pre-defined models
- Equipment and History can be transferred to new owners



# Helpdesk Management

With Opera II Helpdesk Management you can log calls against a company and individual contacts and track them through to resolution. The Helpdesk provides a central point for recording problems, customer complaints, installation and preventative maintenance visits. The Helpdesk is used when these issues need to be tracked, planned and resolved. Each call can have activities and notes or documents associated with it. Access is also provided to a knowledge base to aid swift resolution of the issue. In addition, any further calls can be linked to an original call and easily viewed.

Calls can progress through various optional stages:

- Raised:** any person can raise calls
- Owned by:** the call can be owned by a person or stage, such as WIP, Workshop etc
- Allocated:** the call is routed to a controller for validation, planning and action. After it has been allocated, a call can be scheduled for an engineer
- Planned:** the call is loaded onto the scheduling board and an engineer is assigned to it
- Travel:** the engineer is on the way
- Working:** the engineer is working on site
- Completed:** work is done and the call is closed

## AVAILABLE CALL TYPES

**Helpdesk calls** are individually numbered, date recorded and measured against configurable SLAs. These calls initiate, collect and cost work carried out, parts used and can be raised against contacts and contracts. Call data can also contain equipment register and part coding.

**Preventative Maintenance calls** are service-related calls with a planning date. These appear in the scheduling system and are also visible when organising Helpdesk calls (in case the engineer can do both at once).

**Installation calls** are planned visits to install or set up equipment and can be scheduled.

**Change Requests** are used for changes to the design of equipment or software which need formal control. This type of call needs planning and has documents and time spent on it. It provides a useful change history to items such as parts or Assets (Equipment) as calls progress through key stages.



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