

Field Service Management

Bross Group's Field Service Management (FSM) solution was created with the goal of optimizing processes for companies whose success is dependant upon technicians in the field. Our FSM solution focuses on implementing practices which will ultimately reduce calls between call centers and technicians; eliminate much of the administrative and manual tasking; improve business processes from the point a request for service is made; and manage your field service business in real time. This requires accurate and frequent views into Field Service Data to track work order status, technician productivity, and customer satisfaction among other things.

Bross Group has partnered with AMTECH, a leading provider of Enterprise Service Management Systems, to offer our client's a strong software infrastructure built with the latest Microsoft technology. **SERVTRAC®** is a suite of integrated field service management solutions that provide the tools your company needs to manage all aspects of service delivery.

Standard Components of SERVTRAC®:

- Call Center Management
- Graphical Call Boards
- Mobile Data - Wireless Field Service
- Web-Based Customer Service
- Order Management
- Contract Management
- Inventory Management

SERVTRAC® Software Solution

SERVTRAC® provides companies who depend on a mobile workforce a way to simplify business processes, reduce overhead, improve technician productivity, and improve delivery of services to their customers. Service organizations are able to:

- **Significantly reduce the number of calls between the call center and field service technicians.** In a field service environment that averages four completed calls per day, an average savings of 15 minutes per call per tech can translate into an annual saving of 2,080 hours for each group of eight technicians. A small company can gain the productivity of one technician with no increase in overhead. A larger company, with 160 field service techs, can gain the productivity of 20 technicians with no increase in overhead.
- **Significantly reduce administrative overhead associated with processing work orders and invoices manually after the technician turns in the "paperwork".** Electronic work orders that are processed in real time allow companies to recognize service revenue and account for warranty cost, contract cost,

and parts and labor cost in real time. Service history and technician productivity is also captured in real time.

- **Simplify and improve business processes.** Process improvement can flow from the point that a request for service is made through invoicing, posting, and accounting system updates via integration with accounts receivable, accounts payable and general ledger.
- **Manage their business in real time with a significant improvement in management reporting.** Proactive management of warranty cost, contract profitability, parts cost, labor cost, equipment mean-time between failures, performance against customer SLAs, technician productivity/profitability are just a few of the metrics that are available.

Call Center Management

SERVTRAC® Call Center Management has been designed to support multi-tiered service operations that need to handle inbound requests for service. Whether your customer calls are placed at a central call center, a field service office location, a customer web-portal, or a third party service provider, **SERVTRAC®** will provide the ability to easily manage customer service from a global, national, regional or local view.

Configurable workflow features enable end-users to tailor the software to their local needs and a rule-based alert feature allows the system to remind users of tasks that need attention.

Examples of system alerts include:

- Warranty and contract expiration
- Contract inspections that are due or past due
- Alerts to escalation of service call status
- Alerts to customer entitlements
- Sales Lead or Quote Follow-up
- Accounts receivable for collection activity
- Configurable algorithms for call planning
- Call Administration - Add or Update Call View
- Add/Update Call View is used to add new calls and to update existing calls

Graphical Call Boards

SERVTRAC® Call Boards are configurable at all levels of the enterprise, allowing the business to easily define their service organization to meet their needs. And, if requirements change, **SERVTRAC®** simplifies the process of redefining how the call center system will facilitate that change. Depending on user account roles and permissions, the Call Boards will provide access to the following service information:

- Global View of all call activities in the enterprise service area
- Regional View of calls in a user defined regional service area

- District View of calls in a user defined district service area
- Local View of calls in a user defined local service area

Each of these service activity Views may be configured to allow managers to drill down further to see clearer picture of service commitments. Within each service area calls may be filtered to show:

- Corporate service activity.
- Independent service company activity who perform service exclusively for the enterprise.
- Vendor service company activity who may perform service on an "as needed" basis for the enterprise.
- Callboards allow you to use drag and drop features for call assignment. You can also use the right click to un-assign, re-assign, recommend a technician or view calls via the Update Call View to make changes.
- Color views differentiate calls to make it easy for the dispatcher to see changes that are occurring due to expiring SLAs, call escalations or changes in customer priorities.
- As calls are assigned via any of the callboards, technician's qualifications are considered along with his current work schedule and allowable overtime to determine if he is capable of taking the call.

Mobile Data - Wireless Field Service

SERVTRAC® has been developed using the Microsoft® .NET Compact Framework, Microsoft® SQL Server 2000 CE runs on the industry standard operating systems for handheld computers, PDAs and other mobile client devices.

In addition, **SERVTRAC®** provides features that will allow field service personnel to utilize web-enabled cellular phones. Both platforms will offer a full suite of "mobile data" applications that will help eliminate the manual inefficiencies and paperwork that overwhelm technicians and administrative staff.

SERVTRAC® and Microsoft's® Windows Mobile™ software provides the following capabilities to be run on mobile devices:

- Receive assigned call list electronically, provides access to customer information and equipment histories
- Track travel and call completion times
- Account for inventory usage with quick access to stock quantities and pricing
- Complete work orders and reduce the redundancy of data entry, minimize errors and lost service tickets
- Work-order is a single point-of-entry; from the mobile device through general ledger
- Accelerate billing cycles, improve cash flow, and cost benefits through efficiency gains



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- Automatically update call and invoice information before end of day
- Barcode scanning capability for field generated invoice and physical count activities
- Capture customer signature electronically and print work-order

Web-Based Customer Service

SERVTRAC® is a web-based customer service program that may be used as an integrated component of the **SERVTRAC®** Field Service Management System. The suite of "customer web-portals" will allow you to provide e-commerce capability to your customers, offering them an alternative way to purchase your products and services.

SERVTRAC® Web-Based Customer Service provides your customers with the following capabilities:

- Secure and immediate access to their account information via web portals
- Secure access to the **SERVTRAC®** Dispatch system, allowing them to:
 - View their equipment records
 - Select equipment to be serviced
 - Submit a request for service
 - Request quotation for contract service
 - Track call activity "on-line" through call completion
 - Receive invoices via e-mail

Secure access to the **SERVTRAC®** Inventory system, allowing your customers to:

- View inventory availability and pricing
- Request a quotation
- Submit an order
- View order history, management reports

Customer reporting may also be published to selected customer accounts. **SERVTRAC®** will offer the ability for customers to:

- View service and sales history online
- Provide a powerful and unique competitive differentiator

E-COMMERCE provides the following benefits:

- Adding the Internet as an alternative way to provide products and services is convenient and greatly enhances your customers' service experience
- A less expensive communication method for customers to contact you, which helps streamline your operating costs
- The self-service concept of **e-SERVTRAC®** reduces the workload of the call center staff, sales staff and parts sales staff, and increases their productivity
- Instead of answering customer inquiries, employees can spend more time scheduling, dispatching, selling and servicing your customer needs

Order Management

SERVTRAC® Order Management system provides quotation processing capabilities for:

- Service Quotations
- Equipment Quotations
- Spare Parts Quotations
- Service Contract Quotations

SERVTRAC® Order Management system provides order processing and invoice capabilities for:

- Service Work-orders for warranty services, service contracts, time and material and non-billable such as call-backs
- Equipment Orders
- Spare Parts, Counter Sale Orders
- Service Contract Billing Orders

SERVTRAC® Order Management also provides the following capabilities:

- Invoice Print, Edit Print and Posting
- Invoice Register, Account Distribution
- Sales Analysis and Reporting

Contract Management

SERVTRAC® Contract Management System provides a comprehensive and flexible infrastructure for managing complex customers offers and entitlements for national or regional accounts, as well as a simple and easy to use system that can be used to manage locally administered contracts.

Features include:

- Contract Administration
- Contract Quotation
- Contract Inspections
- Contract Billing
- Contract Amortization
- Contract Renewal Administration
- Contract Analysis and Reporting

Inventory Management

SERVTRAC® Inventory Management Systems provides a comprehensive and flexible infrastructure for managing service inventory. Features include:

Inventory Control

- Supports all costing methods
- Customizable user settings such as colors, grid columns and function keys.
- "Add on the Fly" feature is built-in throughout the application.
- Export any grid to EXCEL spreadsheet with the click of a button.
- Item Maintenance includes information on parts, warehouses and pricing
- Grids are "customizable" by the end user so displaying "useful" information or sorting displayed information can be done easily
- Images of parts can be stored for easy access.
- Simplifies access to your data for analytical purposes. For example, select Movement Inquiry for one warehouse or all warehouses; one transaction type or multiple transaction types; one item or range of items; and the results will be displayed.
- To copy the information to Excel for further analysis, graphing or sorting, click the Excel Icon in the upper right hand corner of the grid and your data will be immediately transferred to an open Excel worksheet.
- Other similar features include ABC Analysis for ranking, Item Classification for Inventory Grading and Min/Max calculations.
- Simplified physical count process offers a variety of options, including cycle counts, with options to count warehouse, item, bin and/or product group ranges.
- One screen controls the whole process and shows current status of all warehouse counts currently in process.
- Reporting includes warehouse variance report and post report.
- Accounting entries can be assigned to reason codes setup by the user.

Purchase Order

- Reorder Advice allows you to request a report for one or more warehouses; for a range or all items in the warehouse or for a range of one or more product groups.
- Results of reorder advice can be used to create a PO, create an immediate transfer or to create a transfer request. POs are printed, e-mailed or processed though a web-service link.
- Reorder Advice allows immediate results to be viewed or printed, and makes it easy to modify the results.

Product Service

- Provides links to from local main warehouse and service vehicle inventory to other warehouses with access to the enterprise, either internal or external business partners.
- Provides Internet links (via Web Services) to parts catalogs, technical manuals, CAD library and troubleshooting guides, as they and other information are made available by the manufacturer.
- Simplifies transfers, purchase orders or sales orders by allowing you to build a "list" of parts or machines, and then automatically transfers the list to the appropriate application.
- Web-Based Product Services provides links to business partners and customers



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Inventory Analysis and Management Reporting

- Robust reporting module for analysis of all the data being captured throughout the application.
- Uses Crystal Reports, a powerful report design tool with built-in options to view reports before printing, and options to output to EXCEL, WORD or ACCESS.
- Custom reports can easily be added to standard “front-end” report writer, which offers a variety of selection criteria to the reports.

Back Office and Accounting Interface

Industry & Vertical Focus

Equipment Manufacturers who provide warranty, contract and ongoing service at their customer locations

Equipment Distributors who provide warranty, contract and ongoing service at their customer locations

Independent Service Companies who provide warranty, contract and ongoing service on behalf of distributors or manufacturers.