

# Service Manager



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**Service Manager is a comprehensive and holistic workflow management tool integrated into ITQuoter. Both solutions have been developed by iSell, a management specialist to the IT industry, serving entry-level to full global enterprise B2B or B2C environments.**

With Service Manager you are able to store all key information about your customers and service jobs in a single interactive repository.

Accounts, contracts, sales leads, activities, job opportunities, quotes, purchase orders, project information, renewals, jobs, time sheets and general notes are available on-demand.

***“Doing business in Real Time is the secret to success!”***

Much more than a vault of critical information, Service Manager provides total flexibility to configure your own system. You can adapt it to your business' processes - including work flow, user-definable groups, categorising, tracking, cost rate types, progressive billing, time sheets and so on. User-views can be tailored to suit stakeholders' roles.

Service Manager makes it easier to manage service agreements by automatically publishing email alerts and event triggers to key contacts to notify them of approaching projects, deadlines, customer requests, faults, tasks, etc.

Communication between support/sales personnel and clients is enhanced by the automated capture of job histories, service technician details, etc. to produce detailed audit trails.

## **Pre Paid Contracts / Block Billing**

Bill your customers in advance for services and track all timesheet transactions until the contract expires or runs out of time.

The Pre-Paid Contract feature can also be setup to bill on a monthly basis for a certain amount of time for a particular value. You can even define what types of jobs are applicable to the contract so that high value services, eg. Project Management are not included.

## **NEW! Next Point of Action**

The Next Point of Action allows you to quickly setup exactly what has to be done on a Job/Ticket next, and when it has to be done, eg. Call customer back (date set to tomorrow), waiting on parts to ship (date set today at 2pm).

Next Point of Actions can be allocated to customers and engineers and easily tracked by users and management.

This is a fundamental component of the system and ensures you keep your service promises to your customers and that each job/ticket is.

# Service Manager

## Features

- Customer Service (Planned or Unplanned) Management
- SLA (Service Level Agreement) can be implemented generally over the system or on a customer-by-customer basis
- Service Contract Management for Standard Fixed Rate Contracts, Pre-Paid Contracts or Monthly Reoccurring Contracts
- Automatic scheduling of job creation with flexible reoccurring options on a customer by customer basis
- Knowledge Management (FAQs, How-to guides)
- Call Centre Support
- Adapt to your way of tracking and categorising jobs through a fully customisable tree menu structure
- Job billing function via user definable Rate Types, Progressive Billing, Travel time, Non-Billable job, and Billing period
- Detailed job history keeps logs of issues, notes, solutions and an audit trail of changes to each job/ticket in the system
- Event trigger mechanism for Jobs that can escalate and email warnings to key personal
- Automatically changes status and priorities of jobs that are not meeting your service expectations.
- Track and time multiple jobs simultaneously via timers sub-system to ensure even the briefest of calls are easily captured and billed

« Area9 IT Solutions is a Northern Territory IT Company delivering information technology Services to corporate and government clients. Founded on the ITIL service delivery methodology; Area9 IT Solutions delivers a comprehensive suite of IT Facilities Managed Services to small, medium and large enterprises.

We have used iSell IT Quoter, as our quoting application for a number of years and two years ago we went to the market for a Service Management System.

We were impressed from the beginning with iSell's Service Management tool. Since it is an ITQuoter extension, the learning curve was drastically reduced for our staff, and integrating it into our business was a breeze. It took our fifty engineers a very short time to become totally comfortable with the environment. Jobs are easily updated and time is recorded accurately against the jobs, our customers have visibility into the progress of their jobs via the Customer Portal and through use of filters the system is very easy to customise to meet our business requirements. The iSell support staff provides excellent support and are always willing to assist us in getting the best from our use of the application. »

**Mary McAlpine**, Director, Area9 IT Solutions

Product Features	Standard	Advanced
Real Time link to ITQuoter business databases	✓	✓
Service Level Agreements	✓	✓
Fully customisable tree menu system	✓	✓
Fully Flexible Billing System	✓	✓
Callout Fees and Travel Time	✓	✓
Billable and Non-Billable Rates	✓	✓
Next Point of Action Management	✓	✓
Multiple Tasks per Job	✓	✓
Store attachments, links to external websites and shortcuts to internal documents	✓	✓
Combine multiple Jobs/Tickets into a single project	✓	✓
Security Sub-System to control access to final billing, ticket closure and other critical management processes	✓	✓
KPI reporting on Billable and Non-Billable work for all Service Engineers	✓	✓
Timers for up to nine simultaneous sessions per Help Desk Engineer	✓	✓
Pre-Paid Service Contracts	✓	✓
Monthly recurring jobs/tickets		✓
Customer portal support via iSell Online eProcurement Systems		✓

FLOW

