



Central

Superior Service Management Software

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Seratec Central service management system is an advanced yet highly affordable system that delivers outstanding productivity gains, improved customer service, improved cash flow and simplified business management.

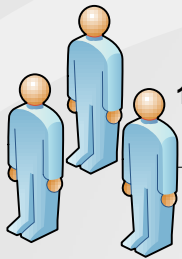
In-built workflow management coupled with high levels of automation ensure that human labour is minimised and productivity and reliability of processes is maximised.

It is suitable for most **service industries** including:

- Air-conditioning
- Appliance service
- ATM/Gaming/Vending machines
- Cleaning services
- Electrical
- Fire protection
- Help desk
- IT service provider
- Lifts/Escalator service
- Machinery service
- Pest control
- Phone system service
- Plumbing
- Printer/copier service
- Property maintenance

Job Management

Managing a job in Central is a simple process. Since Seratec Central is a single place for all data entry; there is no double entry into different systems and there is a logical flow of data between office staff, field staff & accounts.



1. Customer calls - reports a service call



2. Lodge job in Seratec Central

Record:

- Customer & contact detail,
- Job Nature,
- Description,
- Urgency,
- Site Address,
- Order Number,
- Linked asset(s)
- Etc.

3. Schedule Job

- Daily or weekly views,
- Unassigned job list,
- Move unassigned jobs to schedule,
- Reschedule/re-assign jobs,
- Create new job directly in schedule,
- View jobs for a day in Google Maps view.

Job Management

4. Field Tech receives job on PDA



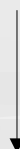
- View job details
 - site address,
 - customer contact details,
 - job description, etc.
- View past site job history



5. Field Tech performs job



- Complete any checklists (e.g. safety checklist),
- Use timers to track travel time and time on site,
- Add work details (what work was done),
- Add billing (time & parts),
- Take photo's and attach to job,
- Make drawing/sketches and attach to job,
- Get customer signature,
- Record any payment,
- Print job receipt,
- Close job.



Job Management

6. Office Staff – review/update job details

Date	Item	Qty	Price	Total	Total Cost	Markup %	Charge Client	Supplier
17/12/2010	A \ Hours > Travel time	1	\$179.25	\$179.25	\$75.00	139.00 %	True	
17/12/2010	12 Litres Widget type 3	1	\$15.91	\$15.91	\$10.90	45.96 %	True	

Total Summary

Total Labour: \$179.25
 Total Purchase: \$15.91
 Total Billing: \$195.16 (exc. GST)
 GST: \$19.52
 Total Billing (inc. GST): \$214.68 (inc. GST)
 Total Invoiced: \$0.00 (inc. GST)
 Total Applied: \$0.00

Profit Summary

Quoted Amount: \$0.00 (exc. GST)
 Total: \$195.16 (exc. GST)
 Charge Amount: \$195.16 (exc. GST)
 Total Cost: \$85.90
 Profit: \$109.26

- Review (and update if required) details entered into job by field tech.
- See margin/profit on job.
- Once approved send for invoicing.

7. Invoice Customer

Invoice Details

Invoice No: 2191 Finalise
 Date: 12/07/2010
 Bill To: [Company] - Seratec

Summary

Total Charged: \$2,429.09 (Exc. GST)
 Total Cost: \$876.69 (Exc. GST)
 Profit: \$1,552.40
 Total Charged (Inc. GST): \$2,672.00
 Balance: \$2,672.00

Task Ref	Name	Comment	Qty	Charge Amount	Total	Cost Amount
6869	Actron Inverter		2.00	\$909.09	\$1,818.18	\$225.00
6869	Glass Widget		3.00	\$203.64	\$610.91	\$142.23

Generate Invoice

Would you like to Email or Print any Invoices now? Emailing or Printing will save the current task first.

Email or Print...

This Invoice Only All Uninvoiced All Invoices

Email Print Nothing

- Generate invoice,
- Can generate staged invoices if required.
- Email or print invoice.

8. Export invoice to accounting system

Options

Full Sync

Contact Sync: Central > MYOB Companies only

Inventory Sync: Central > MYOB

InvoiceExport: Individual Only Actual Invoice Date

Move Exported Tasks

Purchase Order Export

Invoice Payments Export

Display Warnings: Yes

Log

- No double entry – entered only once into Central then exported to accounting system.
- Fully automated if use MYOB.
- CSV file import/export for other accounting systems.
- Custom development available to automate to other accounting systems.

Managing preventative maintenance jobs only involves setting up your schedules, the system takes care of the rest by automatically generating them at the scheduled date.

1. Create Schedule

- Set job template details:
 - customer,
 - site address,
 - linked asset,
 - fixed billing,
 - etc.
- Set cycle/pattern:
 - monthly,
 - weekly or
 - daily.
 e.g. every 6 months.



2. System automatically generates jobs based on Schedule



3. Schedule Job

Title	Priority	Ref	Assigned User	Sch/Due Date	App: Nature
Deliver a new Widget maker		6643		6/07/2010 9:46:00 AM	
Demo > Homegreen Friday Demo		6450		19/06/2010 10:30:00 AM	
Ice machine		6624			Appliance > Change co..
Inspections > Solar (checklist)		6791		9/07/2010 9:41:00 AM	Inspections > Solar (ch..
test		6677		21/07/2010 8:32:00 AM	
xxx				10/07/2010 10:27:00 AM	

- Once generated jobs to appear in unassigned list,
- Schedule job a per normal breakdown/service job.

4. Dispatch to field, review & invoice as per a normal breakdown/service job

Impress your corporate customers by providing them access to the customer web portal. Enabling instant job status lookup, lodge new jobs themselves without having to call your service desk.

Allow customers to see details about all of their jobs

Allow customers lodge their own jobs

- Free up time of your service desk staff from having to respond to job status enquires from clients.
- Provide customers with 24hr, 7 day a week access to their job details.

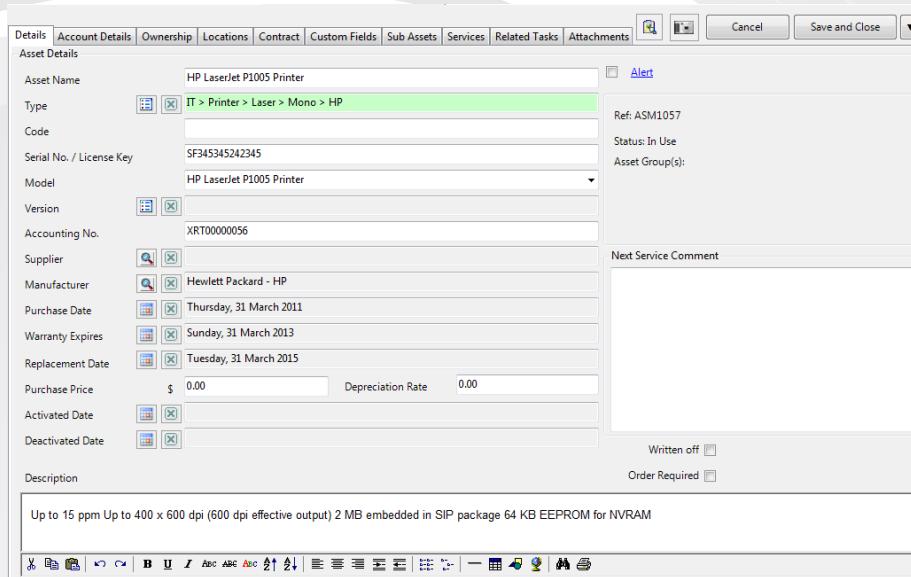
Post notices to customers

- Easily inform customers about new services, new products, special offers, etc.
- Post notices directly to individual customers or all customers.

Provide customers with self-help knowledge base

- Allow customer to search and find product manuals, how to documents, links to useful web sites, etc.

Seratec Central's asset management component allows you to track both customer installed assets/equipment and also your business assets/equipment.



The screenshot displays the 'Asset Details' form for an HP LaserJet P1005 Printer. The form includes the following fields and values:

- Asset Name: HP LaserJet P1005 Printer
- Type: IT > Printer > Laser > Mono > HP
- Code: (empty)
- Serial No. / License Key: SF345345242345
- Model: HP LaserJet P1005 Printer
- Version: (empty)
- Accounting No.: XRT00000056
- Supplier: (empty)
- Manufacturer: Hewlett Packard - HP
- Purchase Date: Thursday, 31 March 2011
- Warranty Expires: Sunday, 31 March 2013
- Replacement Date: Tuesday, 31 March 2015
- Purchase Price: \$ 0.00
- Depreciation Rate: 0.00
- Activated Date: (empty)
- Deactivated Date: (empty)
- Description: Up to 15 ppm Up to 400 x 600 dpi (600 dpi effective output) 2 MB embedded in SIP package 64 KB EEPROM for NVRAM

Additional information on the right side of the form includes:

- Alert:
- Ref: ASM1057
- Status: In Use
- Asset Group(s): (empty)
- Next Service Comment: (empty text area)
- Written off:
- Order Required:

Track serial number, warranty expiry date, model, supplier, manufacture, etc. of assets/equipment. Seratec Central will also allow you to track:

- Ownership History – track change of ownership.
- Location History – track moving of asset form one office location to another.
- Service History – track service history of asset.
- Tagging History – track tag & testing history of asset.
- Contracts – link asset to contracts to manage customers who are on contracts.
- Link asset(s) to jobs to enable reporting of assets/equipment requiring to most service.

Seratec Central comes with advanced inventory management capabilities. Efficiently track all your stock, including stock levels down to the vehicle. Seratec Central will enable you to better manage your ordering process to prevent overstocking of parts.

Features include:

- Items
 - serialised or non-serialised
 - stocked or non-stocked
 - diminishing or non- diminishing
- Multi-Locations
 - multi-warehouses
 - track technician /vehicle stock
- Link items to multiple suppliers (with different part no & purchase price)
- Setup and monitor minimum levels & reorder amounts
- Easily see locations that require restocking
- Transfer stock between your locations
- Perform stock takes
- Perform usage analysis based on past usage

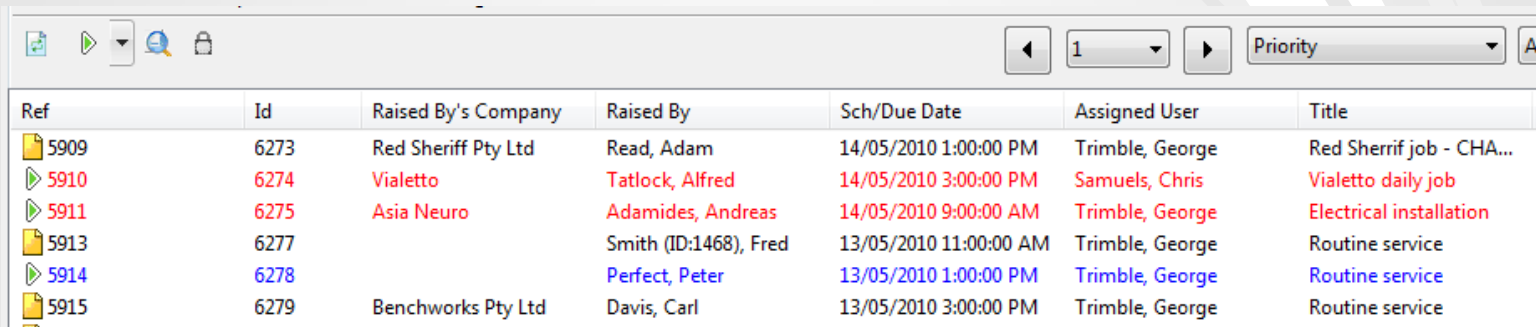
Ensure jobs are acted upon in a timely manner and hence increase customer satisfaction by implementing escalations.

Implement escalations to ensure:

- All jobs are acted upon in a timely manner,
- You meet your service levels,
- Never knowingly overlook a job,
- Proactively act upon jobs before customers contact you to complain.

Escalations can be based on:

- Job's creation date/time,
- Job's secluded date/time,
- Job's service level due date/time,
- The amount of time a job has been in a certain workflow state/status.



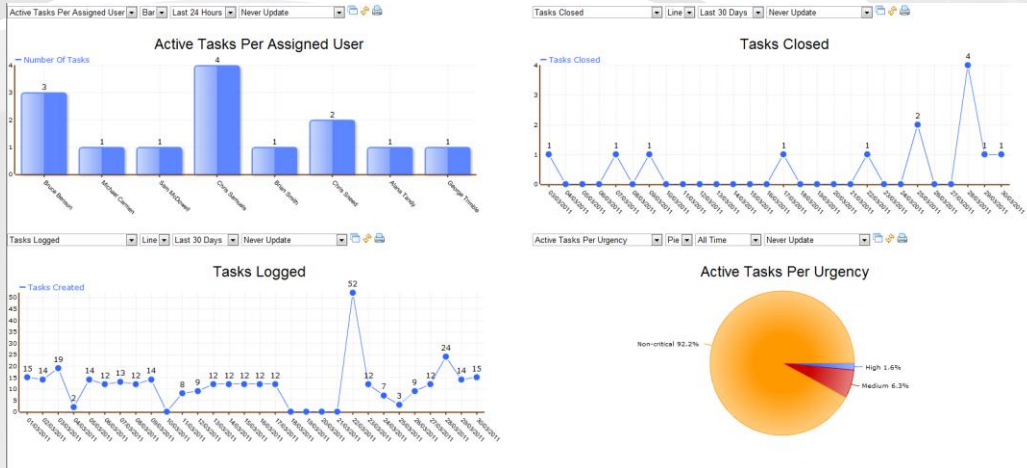
Ref	Id	Raised By's Company	Raised By	Sch/Due Date	Assigned User	Title
5909	6273	Red Sheriff Pty Ltd	Read, Adam	14/05/2010 1:00:00 PM	Trimble, George	Red Sherrif job - CHA...
5910	6274	Vialetto	Tatlock, Alfred	14/05/2010 3:00:00 PM	Samuels, Chris	Vialetto daily job
5911	6275	Asia Neuro	Adamides, Andreas	14/05/2010 9:00:00 AM	Trimble, George	Electrical installation
5913	6277		Smith (ID:1468), Fred	13/05/2010 11:00:00 AM	Trimble, George	Routine service
5914	6278		Perfect, Peter	13/05/2010 1:00:00 PM	Trimble, George	Routine service
5915	6279	Benchworks Pty Ltd	Davis, Carl	13/05/2010 3:00:00 PM	Trimble, George	Routine service

Examples:

- 2 hours after job is created and job still unassigned highlight in interface by changing colour to Blue.
- 4 hours after job is created and job still unassigned highlight in interface by changing colour to Red.
- 6 hours after the scheduled date/time and job not closed email goes out the assigned users manager.
- 24 hours after the scheduled date/time and job not closed email goes out the assigned users manager's manager.
- 30 day after jobs is moved into Awaiting Payment workflow state highlight in interface by changing colour to Blue.
- 40 day after jobs is moved into Awaiting Payment workflow state highlight in interface by changing colour to Red.

Dashboard

The dashboard enables managers to quickly monitor how your service desk is performing.



Projects

Manage large projects (e.g. large installs, etc.).

Can assign 'sub jobs' to different staff members.

Can setup dependency between sub jobs.

The project manager can monitor the progress of each 'sub job'.

The screenshot shows a project management interface for an 'Appointment' project. It includes a table of tasks and a Gantt chart below it.

Ref	Title	Type	State	Sch/Due Date	Assigned To
10113	MFG - Spec & Measure	Appointment	InProgress		Gray, Stephen
10114	MFG - Design/approve/order	Appointment	Pending		McGinn, Chris
10115	MFG - Build	Appointment	Pending		McDowell, Sam
10116	MFG - Delivery to site	Appointment	Pending		Nott, James
10117	MFG - 1st payment	Appointment	InProgress		Trimble, George
10118	MFG - 2nd payment	Appointment	Pending		Trimble, George
10119	MFG - 3rd payment	Appointment	Pending		Trimble, George
10120	MFG - Variations	Appointment	InProgress		Virasinghe, David

The Gantt chart below the table shows the timeline for these tasks, with bars representing the duration of each task. Red arrows point from the text on the left to specific tasks in the table and Gantt chart.

Email Listener

Automatically converts emails sent to a certain email address (e.g. support@company.com.au) into a job.

Determines customer reporting job from emails 'senders' address.

Sets the 'title' of the job to be the emails 'subject'.

Sets the 'job description' to be the emails content.

Attachments on the email become attachments on the job.

The screenshot shows an email client window with the following details:

- From:** David Virasinghe
- Subject:** Can't connect to printer
- Attachments:** printer_error_message.png (13 KB)
- Content:** Hi, I am unable to connect to the printer from my laptop, was able to do so yesterday. See attached screen cap.
- Signature:** Best Regards, David Virasinghe, Business Solutions Consultant, Seratec Pty Ltd

Red arrows point from the text on the left to the 'From', 'Subject', and 'Content' fields of the email.

- **Asset Management**
 - record all customer installed equipment
 - record all company owned assets (equipment/tools, vehicles, hardware, etc).
- **Company & Contact Management**
 - customer details
 - supplier details
 - customer & supplier contact details
- **Customer Web Portal**
 - allow customer to lodge jobs themselves
 - allow customers to view job status
 - allow customer to view installed equipment
- **Dashboard**
- **Email Listener**
 - generates jobs from emails sent by customers
- **Interactions**
 - job notes
 - transmittals
- **Inventory Management**
 - multi locations
 - manage min levels & restocking
 - stock transfers between locations
- **Knowledge Base**
 - share knowledge between your users and clients
- **MYOB Integration**
 - export invoices, purchase orders, invoice payments
 - sync inventory, customers & suppliers
- **Notice Board**
 - post notices to customers
- **PDA interface for Tasks**
 - complete jobs in the field
- **Purchase Orders**
 - manage PO's for jobs or inventory restocking
- **Quotes**
 - manage customer quotes
 - convert successful quotes into jobs
- **Reports**
- **Service Level Agreements**
- **Schedule Items**
 - recurring preventative maintenance jobs
 - recurring billing
- **Task Management**
 - core component
 - create job, assign/schedule job, enter work details, invoice, etc.
- **Task Templates**
 - setup common recurring job details
- **Timesheet Site**
 - for non job related time tracking (e.g. Training, Leave, etc).

Seratec Central is suitable for a wide range of industries from internal help desk to field service management.

We have a wide range of customers from small to large organisations, including:

- McDonalds Australia
 - Technical service division.
 - Used to manage field service of their store equipment.



- Brisbane City Council
 - Brisbane City Works.
 - Used to manage field service of street signs in Brisbane.

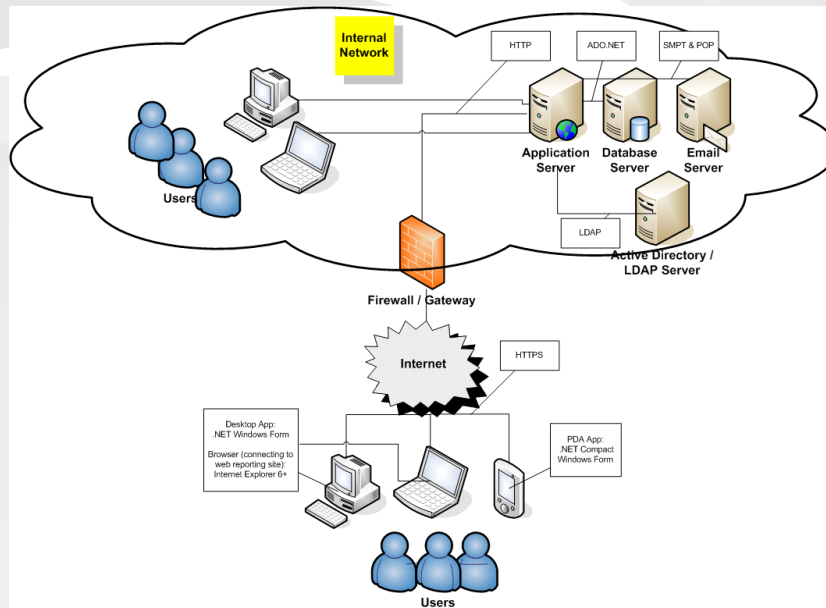


- Utility Asset Management
 - Division of UXC Limited.
 - Used for field service.



- Australian Vintage
 - Australia's third largest wine company.
 - Used by their internal help desk.





Network architecture diagram.

Core system

Seratec Central is developed entirely in Microsoft .NET (C#) and has a powerful XML workflow engine at the core of the solution. The XML workflow engine provides the solution flexibility of process modification without changes to software code.

Modular design

The system is built with a modular design that enables easy and practical expansion and extension of the system. All customers have the same software deployed on their server. Customisation is achieved by changing the behaviour and presentation of the software from site to site to meet each custom requirement through configuration. The solution is generally supplied as an out of the box solution that can be highly configured in a short space of time.

Web services

The system employs web services, which enables the application on desktop and PDA's to be a full fledged desktop GUI and yet use the simplicity of the internet as a connection mechanism. In this way, remote users do not need to use cut down browser based functionality, they can enjoy the power and flexibility of an internet enabled Windows system.

Customisation

A wide range of system attributes are easily customisable. Many are user definable. Some on a per user basis and some on a system wide basis by authorised users. A number of extended capabilities are customisable by Seratec.



- Increase Productivity
 - No double entry (single place for all data entry),
 - No time wasted transferring information between Office staff, Field Tech's and Accounts,
 - Easier and powerful job scheduling tool,
 - Easier tracking of technician profitability and productivity,
 - Optimises administration efficiency – less staff can handle more jobs,
 - Better transparently to managers.



- Increase Profits
 - Improve cash flow – by archiving faster billing cycle,
 - Never loose track of a job,
 - Ensure proper mark-ups are applied to job prior to invoicing,
 - Improved billing of parts – eliminate not invoicing parts used on a job,
 - Ensure no PM is missed,
 - Better stock control.



- Increase customer satisfaction
 - Improved customer retention through better service,
 - Ensure jobs are handled in a timely manner by implementing escalations,
 - Meet all Preventative Maintenance requirements,
 - For larger customers provide them web portal for instant lookup of job status.