

SERVICE & ASSET MANAGEMENT



KEY BENEFITS

- Manage your help desk more effectively
- Escalate customer support calls to field service requests
- Provide rapid answers
- Service levels agreements
- Flexible contract types
- Secure data access
- Change management

Providing excellent service, while managing problems and ensuring solutions are provided in an effective and timely manner is a critical process that requires careful resource planning and effective IT systems. The Greentree Customer Service suite is ideal for providing solutions to these issues, with a proven methodology and highly effective approach for organisations of any size.

Manage your help desk more effectively

The Customer Service suite manages the typical functions of a Customer Service "help desk" with call tracking problem analysis and resolution time frames. Incoming calls can be easily reassigned to the appropriate person or team and tracked through to completion. Follow-up calls or actions required can also be monitored ensuring all outstanding customer issues are effectively resolved.

Escalating Customer Service calls to field service requests and logs

The Field Service capability extends the Customer Support function by allowing calls to be escalated to a field service team via the creation of "service requests." These requests can then be assigned to a service person or team for action, while being monitored as part of the original call. Optional integration to the Greentree Job Cost and Inventory modules is also provided for those organisations requiring detailed tracking and analysis of costs.

Providing rapid answers

Help desk staff are able to work primarily from a single, highly functional screen within Greentree - with instant access to libraries of information. This makes staff more effective in their role, with calls answered and completed efficiently. Staff can also record follow-up actions or additional calls that may be required, send emails or other communications, enter timesheet and disbursement details or escalate the call to a service request if a site visit or other action is required.

Service levels agreements

If required, service levels can also be agreed and implemented as part of the Contract Management process. This allows the response and resolution times to be defined, and then tracked against each support call received. Flexible calendars can be created, to allow for public holidays and nonworking days, and service level monitoring can correctly account for non-service time periods.



“It really is the integration between all the financial modules, as well as the CRM interface, that makes [Greentree] stand apart.”

David Goodwin, Group Financial Controller, The PA People

Contracts

The Contracts module allows specific Customer Service or maintenance contracts to be defined and managed. This includes the products they cover, the contract period and the cost per contract period. Parent/Child contracts are supported for more complex organisations with either multiple contracts or multiple sites.

Flexible Contract Types

A maintenance contract can cover a specific “class” of asset, a defined customer location, or individually specified items. Multiple contracts can be defined for each customer, if required, and contracts can be easily renewed and invoices created.

Secure Data Access

A number of security levels and options are available across Greentree that provide extensive control over access to information via user and team profiles. This ensures individual staff members are permitted to access, view and edit only the information relevant to their work focus.

Workflow Integration

Field Service is fully integrated with Greentree Workflow providing comprehensive views of open or outstanding Customer Service requests and who they have been assigned to.

Presented with this live information, staff and management can monitor and also easily reassign requests to the preferred service technician. These views may be easily customised to provide relevant live information to front line staff, supervisors or management.

These capabilities increase your customer retention rates, helping you to achieve best possible service levels by knowing what’s happening at all times.

Asset Management

Keep costs to a minimum and avoid costly equipment failure with Greentree’s Asset Management module. Track usage and maintenance schedules of physical assets, including those within your organisation and optionally any that are serviced at external locations. External assets may include items that you have sold and are now maintaining under a warranty or service contract agreed with your customer.

Asset Management tracks asset locations, service requests, exchanges, loans and custodial/ownership details. Asset Management module can optionally integrate with Greentree’s Fixed Assets module for depreciation management, Job Costing module for maintenance work and Inventory for parts swapping or exchanges.

Multiple Asset locations can be defined and details of the relevant maintenance contract can be specified per location if Contracts are used.

Scheduled Maintenance

Regular maintenance work can be scheduled and service requests automatically generated as milestones approach. These may include the number of hours a machine has been used or a quarterly maintenance cycle.

Knowledge Base

Links to the Greentree Knowledge Base module assist in researching issues immediately. Products can be linked to specific Knowledge Base library areas with context-related information available on-line and linked directly to a service request.

Customer issues can be resolved more quickly and relevant help documents can be forwarded via email, fax or mail directly to the caller.

KEY FEATURES

Calls and Service Requests

Easily differentiate between requests that can be managed by your help desk team and those that need to be escalated requiring specialist service attention. Greentree's Customer Service module caters to this providing both support calls and service requests. This allows you to provide the best possible service to customers through an effective help desk team and service requests actioned by your service team in the field. Both capture the caller, who the request is for, detail on the problem and solution.

You can also relate the call or service request to an asset or inventory item as well as the appropriate service contract to be used. Support personnel can be scheduled and time worked can be recorded against the support call or service request and flow directly to Greentree's Job Cost system for timely billing and financial management by account.

Logs

Ensure consistency in your development processes and quality product releases. The Log management component of Customer Service is useful for software service and development organisations to manage the progress of a development task through a well structured lifecycle.

Making use of a number of user and system defined fields, you can tailor this development cycle to suit your business needs. You can also define your own software products, modules, versions, log status, code changes, test plans, documentation, business requirements, cause and effects, design information, and specifications.

Schedule Maintenance

Manage the servicing and maintenance of your own assets or those of your customers with scheduled maintenance on Organisation and/or Location level, with the additional option of selecting a Contact. Greentree allows for creation of Scheduled Maintenance Cycles. The cycle is linked against the selected Schedule Maintenance and used to automatically generate Service Requests.

Service Planning

Inbuilt into Greentree's Workflow is the ability to allocate service requests to your employees on a graphical calendar plan. This shows you at a glance which employees are free to take on the next request, and also which employees are over and under utilised and reallocate work with a simple drag and drop.

Interface to Microsoft Project®

Save time and improve the accuracy of your data, with this Job Cost sub-module, to provide a two-way interface between Microsoft Project plan tasks and Greentree service requests including resources and task progress.

Mobility

Companies that provide best in class service performance are two times more likely to use Mobile field service solutions for work order management. Make your service personnel self-reliant with immediate access to their next work request, parts availability, and able to capture time and materials on the job without unnecessary travel time and paperwork.

Integration with other Greentree Modules

Greentree's modular system builds upon and integrates with all other modules to ensure that every drop of business intelligence is extracted from every transaction right across the business – nothing goes to waste. This translates into aggregated business value and you need only purchase the modules that best fit your business.

Information from calls/service requests can be updated to other Greentree modules thus providing comprehensive and immediate control over resources and planning. Customer Service integrates in real-time with these Greentree modules:

- Contacts and Relationships
- Asset Management
- Contracts
- Knowledge Base
- Job Cost
- Inventory
- Accounts Payable
- Purchase Orders
- Workflow (Planner)
- Mobile Field Service

For more information about
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