Service Sight



MAKE TOTAL BUSINESS MANAGEMENT OF THE SUPPLY AND MAINTENANCE OF EQUIPMENT EASY



MAXIMISE YOUR BUSINESS PERFORMANCE

Service Sight

Contact our business management specilaists who will be happy to assist you

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MAXIMISE YOUR BUSINESS PERFORMANCE

Drive operational efficiencies and reduce costs with the powerful end-to-end office and mobile software application that has been transforming service and maintenance businesses.

Release management and administrative staff from the high levels of paperwork associated with supplying, installing, maintaining and hiring equipment.
Free up valuable time that can be better spent on more productive and profi table activities such as pursuing new business.

Mobilise your workforce to work smarter and improve the quality of your customer service.

Want to know how?

Read this brochure to find out how satisfied customers use Protean Software's end-to-end office and mobile solution to:

- Streamline business processes and operations to drive efficiencies and reduce costs.
- Have the management information they need to make informed decisions.



"Servicesight has saved us time and money, easy to navigate round the programme and great for field engineers booking and planning calls." - **Gavin, Director**

Service Sight

WHY SERVICESIGHT MAKES SENSE FOR YOUR BUSINESS

Make it easy to simplify business processes so that you can maximise your potential.

Since 1996, Protean Software has helped companies involved in equipment supply, installation, and maintenance to:
• Drive efficiencies with adaptable software that addresses the complete service life cycle, from lead generation and project quotation through to service billing and asset retirement.

Improve the way they work by:

• Simplifying business processes so that they can make time and cost savings.

• Providing easy storage of job-related documents and reducing the risk of human error.

• Providing the intuitive tools they need to deliver better customer service.

• Make informed decisions, with easy to reach, easy to read management information

Your next step

Bring together all the tools you need to manage your operations and grow your customer relationships.

Find out how Protean Software can help your business. Book a demonstration today.

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Website: www.proteansoftware.com
www.proteansoftware.com/our-products/servicesight-pro-software/



''We have had a positive experience with Servicesight, overall they have delivered exactly what we required as a reactive service lift engineering company. We would recommend Servicesight to any company that has reactive field service engineers.''

Service Sight

MAXIMISE YOUR ROI WITH PROFESSIONAL TRAINING AND CONSULTANCY SERVICES

ServiceSight has been designed to be as easy to use and setup as possible. However, like any software, ensuring that it is setup in the best way to support your business processes is absolutely key to ensuring your company fully realises the benefits of ServiceSight.

SERVICESIGHT'S IMPLEMENTATION METHODOLOGY



Supported Implementation Package

The Supported Implementation package is suitable for established companies who have previously used and managed a service management software package and can therefore manage system configuration themselves. Ideally, companies embarking on this methodology will have a key person or persons who are very familiar with managing field service software.

This person or persons will lead the implementation and need to dedicate significant time to configuring the system, entering any required data and testing. It is envisaged that this methodology would only be adopted by very small, established companies with 1-5 users who have clearly defined, simple requirements, well aligned with current Service-Sight functionality.



Supported Plus Implementation Package

The Supported Plus Implementation package provides established companies who might have slightly more complex requirements with a little more expert advice and support to manage system configuration. Ideally, companies embarking on this methodology will have a key person or persons who are very familiar with managing field service software.

This person or persons will lead the implementation and need to dedicate significant time to configuring the system, entering any required data and testing. It is envisaged that this methodology would only be adopted by smaller, established companies with 1-5 users who have clearly defined, simple requirements, well aligned with current ServiceSight functionality.



SIM (Servicesight Implementation Methodology)

The ServiceSight Implementation Methodology is a fully managed implementation service specifically designed to ensure ServiceSight is fully implemented for the customer in the best possible way to support your business and ensuring your users are fully trained to use the system including any bespoke or industry specific processes. Whilst the implementation is fully project managed by the implementation consultant the process does require a high level of engagement from the customer in areas like user training, data entry and user acceptance testing.

The SIM package is suitable for any customer and each project is tailored to explore, document and support the customer's specific requirements and business processes.

''The key areas we wanted Service Sight to address were - getting rid of paper work, tracking team performance, reduce administration, improve quality of information and the quality of the reporting that we provide to our customers whilst supporting our other applications.'' - **Richard, Ops Manager**

Service Sight

HOW SERVICESIGHT CAN SUPPORT YOUR BUSINESS

OPTIMISE TIME AND RESOURCES TO DELIVER A HIGH VALUE SERVICE

Access your data from anywhere
With our state-of-the-art cloud solution you are free to work anywhere, at any time. No infrastructure, hardware or capital outlay are required. You can even use your existing Android or iOS devices to run the engineers mobile app.

Effectively manage parts control
Minimise downtime and loss of productivity by controlling and monitoring parts leaving your warehouse. Have the ability to maintain the most appropriate stock levels, so that you can free up cash flow. Be alerted when supplies are low.

Mobilise your workforce
Connect field teams with the UK's leading mobile engineer communications and tracking module. Then enjoy the benefits of being able to track, communicate, collaborate with and schedule your team's activities easily and effectively. Whether you're on-line or off-line.

Easily manage service agreements
Reduce the cost and complexity of administration. Create and record your own contracts. Define tasks, checklists and expenditure (such as labour costs, mileage, travel time, parts, etc.). Then raise invoices simply, at the click of a button.

Reduce risk and keep track of equipment
Replace unnecessary paperwork with the equipment register. Track equipment supplied to customers under warranty, maintenance contract or neither. Use stored equipment finance and insurance information for profit analysis.

Understand the value of client relationships with the CRM/marketing module
Prioritise resources, and safeguard and grow your most profitable accounts. Use the powerful prospect database to increase lead generation, manage your sales pipeline, makeaccurate sales forecasts and predict cash flow.

Streamline job management
Get the 360° visibility you need to manage contracts and projects and increase productivity. Easily access essential job/contract/project information, anytime and anywhere it is needed. Access information about equipment, parts, customer history, service scheduling, invoicing and more, simply and quickly.

Manage the sales process from enquiry through to quotation, order and invoice
Convert quotations to sales orders. Then create service and warranty agreements. Take advantage of a fully automated parts reordering system that helps you to forecast demand.

Empower your customers with a powerful and easy to use web portal
Allow your customers to self-serve via a simple portal that they can access from anywhere. Give your customer the ability to Log jobs, request quotes, view and download invoices, job sheets & certificates, run KPI reports and see complete service histories.

Have the operational intelligence you need to manage your business
Get easy access to the management information you need to improve your company's productivity and profitability. Put your data to work with fully definable business intelligence dashboards. See your vital KPIs as easy to read charts and graphs.

View and download invoices, job sheets and inspection sheets. Leverage the detailed profit analysis facility that provides revenues and costs month by month, by equipment ID, make/model, equipment type, hire contract, service contract, customer, site and more.

Keep customers informed
Save money & delight customers with real time updates delivered automatically as their jobs progress to completion ensuring maximum efficiency and customer satisfaction.

"My experience so far has been fantastic, the customer support has been great. We have gone from using numerous spreadsheets to just using this software and it's working great!." - Katie, Director

REALISE YOUR BUSINESS GOALS WITH SERVICESIGHT BY TAKING ADVANTAGE OF A RANGE OF TRAINING AND CONSULTANCY SERVICES.

	Supported	Supported Plus	SIM
Full Project Scoping & Process Analysis			
Database Pre-Configuration			✓
System Provision & Kick Off	✓	✓	✓
Implementation Planning Support	✓	✓	✓
Configuration & System Setup Support	✓	✓	✓
Help with Data Import ***		✓	✓
Hire Setup	✓**	✓**	✓
Acounts Package Intergration Setup	✓*	✓*	✓
Remote Pre - Go Live Checks (Days)	✓	✓	✓
Consultancy - Post Go Live Follow-Up	Optional	Optional	Optional
User Training - Exclusive Training /Workshop Days		2 x Sessions	All Sessions
User Training - Open Virtual Classroom Training	✓	✓	
Telephone and Email Implementation Support	✓	✓	✓
Access to Online Resources, Webinars and Videos	✓	✓	✓

Key

- - Exclusive Consultancy Sessions
- - Additional Services
- - Open Classroom Based Sessions

* - If Accounts Intergration included

** - If Hire included

*** - Using the standard built import routines

''Easy layout great team that provide the service. It helps me construct my service and delivery to client and my clients love my system and how it works.'' - Ade, Business Owner

Service Sight

CRM

CRM at a glance

Make your organisation customer focused. Use the CRM module to communicate with your customers more effectively. Identify new opportunities, spot trends, save time, reduce costs and ultimately sell smarter and work more efficiently.

Key benefits

Seize the potential of your customer/ prospect data

Take advantage of a full customer, prospect and enquiry management system that can assist you in marketing and selling your products and/or services.

Develop a powerful database of prospective customers

Use key information stored for follow-ups.
For example, know:

- What types of equipment the customer uses.
- When equipment is next due for replacement.
- Who a customer's current provider is.
- Dates for contract renewals.

Set task management activities and reminders

- Use the information for telemarketing, field sales and sales management.

Move prospects efficiently through the buy cycle

Easily convert:

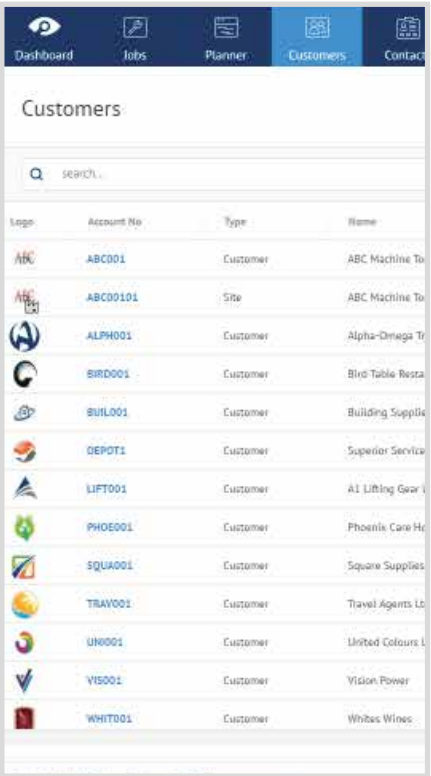
- Prospects to customer accounts.
- Quotes to sales orders, jobs or contracts

Build customer relationships

- Enhance your customers' experience by making communications personal and proactive.
- Gain access to instant visibility of prospect history, including direct access to historic correspondence.

Be in control of your sales pipeline

- Get access to all the information you need to monitor, forecast and plan your sales campaigns.
- Organise your contact strategy and ensure every lead is followed up.
- Categorise sales opportunities by (for example):
  - Likely decision dates.
  - Values.
  - Probability %.
  - Lead sources.



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Quotations

Quotations at a glance

Create quotes for jobs, contracts & sales orders easily. Have customer view & accept them via the Customer Web Portal to create the necessary job, contract or order as needed.

Key benefits

Create quotations quickly

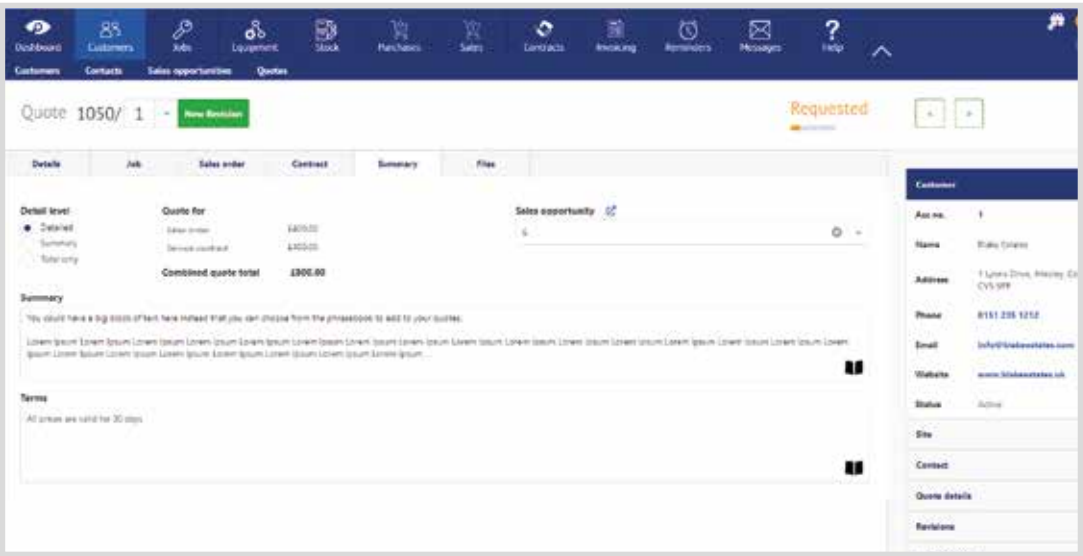
- Choose to quote for a job, contract or sales order – or any combination
- Add labour hours & parts needed which can update to the job if won
- Take advantage of the Phrasebook feature to quickly add blocks of text to quotes

Have the flexibility to:

- Allow your customer to view and accept quotes online to improve turnaround times
- Quote for jobs & contracts on the same quotation to save time
- Quote for work on the engineer's mobile app whilst on site
- Create revisions of your quotes with one click in response to customer amendments

Have confidence that:

- You can win a quote with one click and the necessary forms are raised for you
- Your customers will love the flexibility and visibility available to them



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Job Management 1.1

Job Management at a glance

Have all your job management information in one location. Easily plan, track and manage jobs, teams, parts, resources and time. Reduce the admin involved in project costing, scheduling people and equipment and client billing. Reduce travel time & fuel costs, making sure your engineers are as efficient as possible. Then access all the essential information you need about equipment, parts, customer history, service scheduling and invoicing, anytime and anywhere it is needed.

Key benefits

Get the visibility you need to manage projects and increase productivity

• Use the fully integrated task management system to increase operational efficiency.

• Know whether jobs are unallocated, allocated, awaiting parts, site attended or awaiting details, etc.

Easily assign jobs from the unique customer web portal

• Log and track progress on maintenance tasks.

• Notifications received in real-time.

• Utilise a powerful but simple drag and drop planner board



Schedule field engineers efficiently

• Create efficient work schedules.

• Schedule unlimited engineer visits to a job.

• Prioritise jobs to maximise efficiency.

• Improve coordination with powerful response times and hit and miss ratio analytics.

Effect smarter, faster resource/equipment planning

• Define your own inspections and checklists.

• Provide engineers on call-out with full information about equipment on-site.

• Have the ability to schedule unlimited items of equipment to be serviced per job.

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Job Management 1.2

Reduce manual intervention and keep track of parts requirements

• Save time by automating the processes of:
- Raising orders and parts requisitions.
- Scheduling services due.
- Requisition of parts needed for service jobs.

• Know when jobs await parts.

• Eliminate problems caused by engineers omitting to identify parts delivered directly.

• Be confident in the knowledge that jobs cannot be completed or invoiced whilst purchase orders remain outstanding.

Minimise downtime with intelligent early warning systems

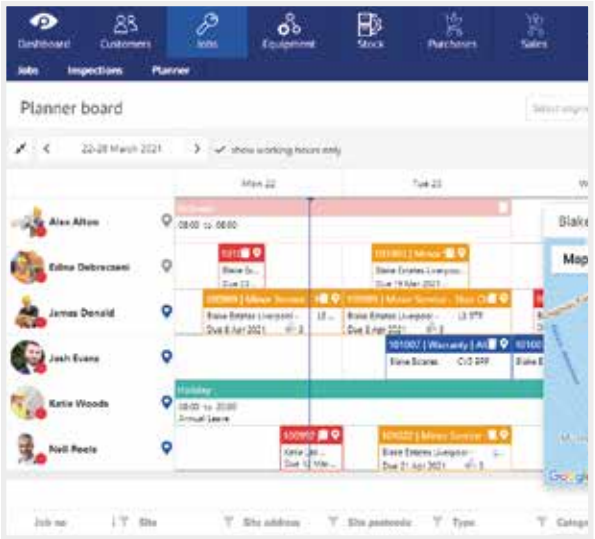
Keep on top of:

• Customers on credit hold or over credit limits.

• Maintenance schedules.

• Equipment under warranty or with a high number of recent jobs.

• Customers flagged as 'order number required',preventing either allocation of engineers or the raising of invoices until an order is received.



Keep on top of job costings

• Save time by automating the calculation of job charges, based on job type and customer agreement.

• Set up permission based user roles to give senior managers the authorisation they need to override costings.

Payments

• Allow engineers to invoice and collect payments on site. You can also enable customers to pay by secure online transaction.

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Mobile Engineer Application

Mobile Engineer Application module at a glance

Connect field teams to the back office. Schedule, dispatch and track your team and their activities easily and effectively. As a result speed up your response.
Reduce drive time and fuel consumption. Get more jobs done... every day.

Key benefits

Schedule jobs efficiently

• Plan ahead. See availability of engineers.

• Track mobile engineer locations.

• Map customer locations.

• Optimise mobile worker routes.

Get 360° visibility of all jobs allocated

• Easily access equipment details, equipment job histories and technical manuals.

Track essential parts information

• Identify details of any additional work required, as well as extra parts needed.

• Easily identify parts with bar code reading.

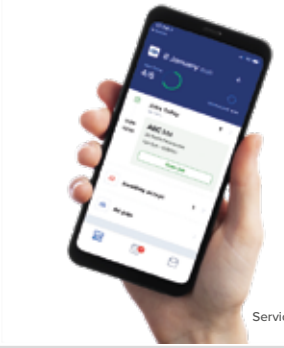
• Have access to parts availability information throughout your company.

Dispatch jobs simply

• Easily allocate resources.

• Utilise a powerful but simple drag and drop planner board

• Connect mobile engineers to the back office with real-time allocation, updating and completion of field service jobs.



ServiceSight Mobile App

Maximise mobile engineers' efficiency

• Guide mobile engineers to their locations with Google Maps.

• Track mobile engineers with GPS technology. Pinpoint their locations on a map and overlay maps with jobs.

• Reduce drive times. Plan the most efficient way for engineers to move around during their working day. View historic travel routes, show times and speeds at each data capture point.

Manage jobs efficiently

• Give mobile engineers target times per job (optional).
Include additional activities such as making trips to suppliers, the dentist, etc. Set activities up as paid or non-paid.

• Minimise mobile engineers' data entry with a phrasebook facility or report dictation.

Communicate critical information and photos easily

• Capture customer signatures on site.

• Capture images on site.

• Automatically email signed job sheets.

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Equipment

Equipment Register at a glance

Gain full control over equipment throughout its lifecycle. Easily search and retrieve the equipment information you need from a simple, unified repository. Reduce time spent wading manually through spreadsheets.

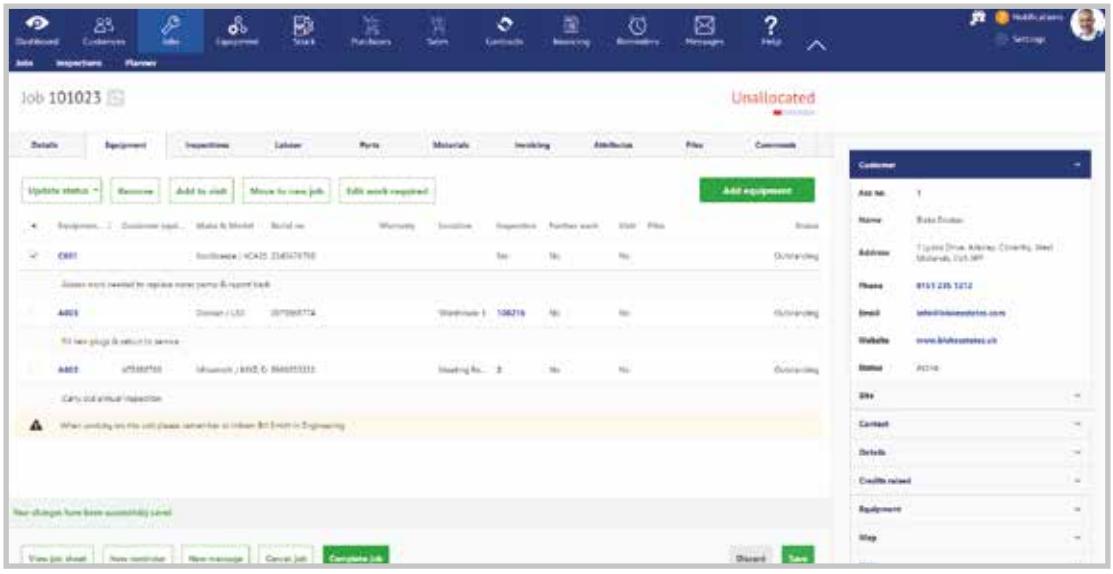
Key benefits

Store unlimited information about equipmentmakes and models
Easily add new pieces of equipment to the database.

Easily access equipment information, including:
- Service levels.
- Parts used.
- Equipment specification.

Keep track of equipment you have supplied, including:
- Warranties.
- Service plans and related contracts.

Gain direct access to equipment records detailing:
- Job history.
- Parts used history.
- Warranty details.
- Maintenance or hire contract.
- Financial summary.



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CRM
Quoting
Job Management
Mobile Engineer App
Equipment
Service Contracts
Recurring Jobs
Stock Parts
Order Processing
Business Intelligence and Reporting
Client Web Portal
F-Gas

Service Contracts

Service Contracts a glance

Reduce the time, costs, risk and compliance issues associated with the creation and administration of customer service agreements.

Solve the administrative problems associated with selling, servicing and hiring equipment, as well as managing mobile engineers.

ServiceSight provides the complete business solution for:

• Reducing the costs and complexity involved in running disparate software packages.
• Streamlining operations and driving operational efficiencies.

• Connecting business processes and workflows seamlessly.

- Modules include job management, order processing, mobile engineers, service agreements, hiring, equipment register, parts control, reporting and marketing.

• Making labour and materials cost savings and improving the bottom line.

• Providing better centralised control.
- Managing communications between the back office and the field. Also scheduling and tracking activities.

Key benefits

Chose from options including

• Labour profiles are unlimited and cover unlimited engineer types.

• Include factors such as overtime and weekend rates.

• Customise rates for individual contracts.

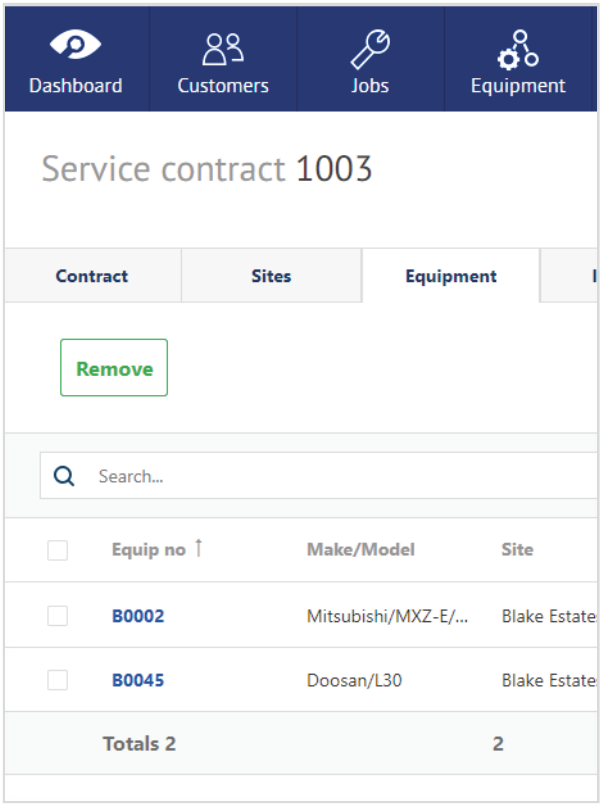
• Set up different charging structures for different job types, such as labour, mileage, travel time and parts.

• For example, set up service jobs as fixed charge, or fixed charge plus consumables.

Then charge parts separately on call-outs.

Have the flexibility to:

• Configure your chosen invoicing cycle
- Daily - Weekly - Monthly - Quarterly
- Annually



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Recurring Jobs

Recurring Jobs at a glance

Create custom service schedules at site, asset group or equipment level to manage your repeat work and preventative maintenance visits.

Key benefits

Create customer service schedules

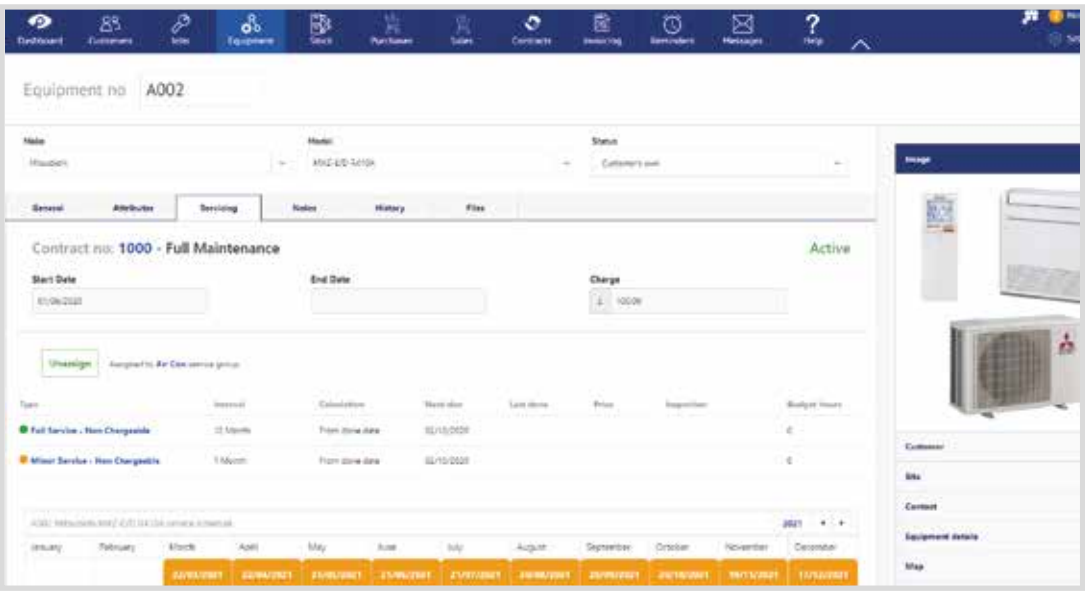
- Plan your repetitive work easily at Site, Asset Group or individual Equipment level
- See the service calendar for any year to check your schedule easily
- Service Groups enable ensure assets remain together for servicing purposes resulting in increased efficiency

Have the flexibility to:

- Assign service parts to each schedule for materials to get added to jobs automatically
- Choose inspection documents to be added to jobs as they are raised by the system

Have confidence that:

- Jobs are raised by the system in advance so parts can be ordered, and appointments made
- You will never miss another service appointment again



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Stock Parts

Parts Control at a glance

Make a positive impact on your cash flow by efficiently managing stock control. Replenish parts quickly and simply. Furthermore improve the efficiency of your field engineer workforce by avoiding unnecessary trips to purchase missing parts.

Key benefits

Track stock simply

• Including by serial number, so that you can speed up warranty control.

Manage van stocks

• Replenish van stocks automatically and intelligently using a van stock level calculator.

Manage stock prices ... simply

• Use the flexible automated parts re-pricing facility.

• Take advantage of numerous parts pricing options available, including:
- Discount matrices.
- Special customer prices.
- Cost plus percentage per product category.

Set up unlimited stock locations

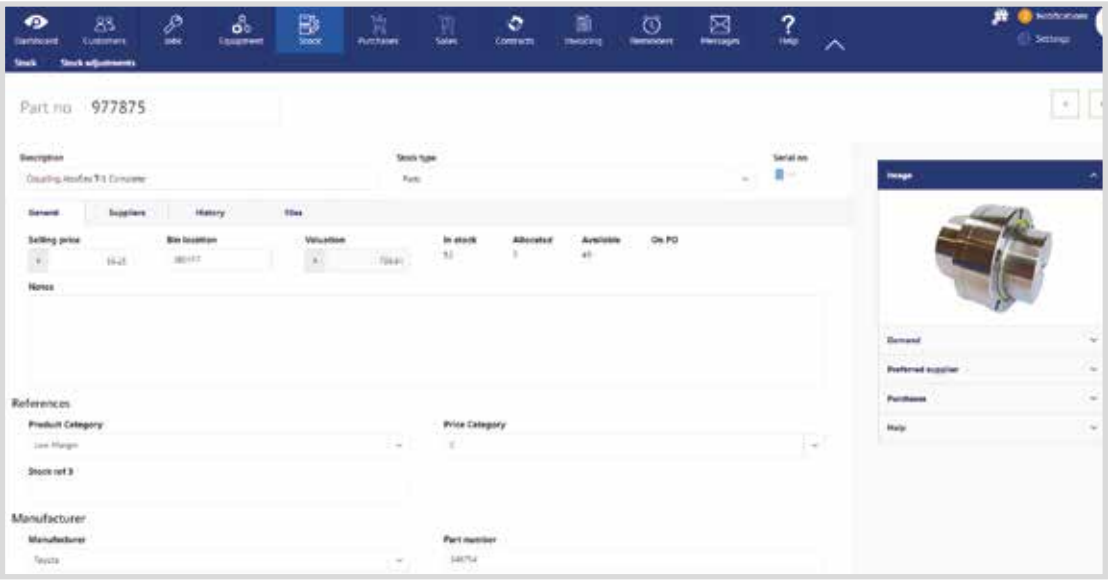
• Choose between warehouses and vans, also bin locations within each warehouse.

Set up unlimited suppliers for each product

• Include suppliers' part numbers, minimum order quantities and lead times.

Harness intuitive stock requisition functionality

• Intelligently link stock requisition to the Job Management Module.



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Purchase Orders & Sales Orders

Order Processing at a glance

Effectively manage orders from quotation through to fulfillment. Streamline the sales process. Empower management with improved forecasting and reporting. Use the order processing functionality to manage purchase orders, sales orders and over the counter sales for parts and equipment.

Key benefits

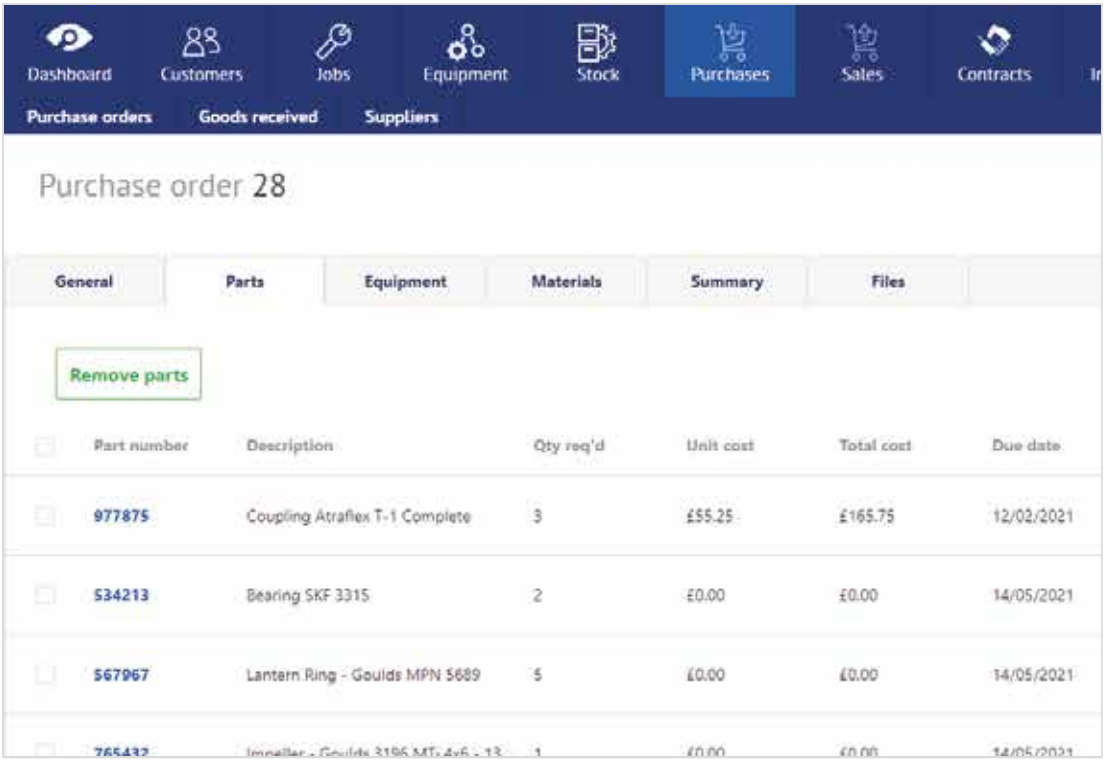
Streamline the sales process
• From enquiry through to quotation, order and invoice.

Generate fast equipment quotations
• Use the advanced equipment quotation feature to pre-configure makes and models with all available options.

Convert quotations into sales orders
• Then automatically create service agreements, with warranty details transferred.

Support multi-currency purchases
• Automate procedures for apportioning special costs to imported goods (e.g., shipping, duty, agent's charges).

Gain 360° visibility of your entire purchase order system
• Save time and increase accuracy with electronic on-screen invoice checking



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Business Intelligence and Reporting 1.1

Business intelligence and reporting at a glance

Improve the quality and quantity of management information and make informed decisions. Have the information you need to plan and control operations and reduce operating costs. Enhance the quality of internal and external communications. As a result deliver high quality customer service.

Key benefits

Have vital business information at your fingertips

• A large libary of easily generated standard ServiceSight reports covering the various modules of the system, then get the information you need to make informed decisions.
• Take advantage of a detailed profit analysis facility, which reports:

- Revenues and costs month by month.

- At all levels including equipment no., make/ model, type of equipment, hire contract, service contract, customer, site etc.

Improve communications with a userfriendly customer web interface
• Allow selected customers to get online access to information about:
- Equipment.
- Maintenance agreements.
- Job updates in real-time as well as complete service histories.
• Use the customer web interface to allow your customers to:
- Log jobs.
- Request quotations.
- Enable your customers to view or download invoices, job sheets or inspection certificates whenever they need them.

Set permission based user roles
• Make use of user definable menus to manage levels of access/authorisation

See the big picture with visual data provided by ServiceSight
• Make it easy to absorb information and measure and analyse performance.

• Customise dashboards based on departmental needs.

• Identify trends, plan and set targets for KPIs.

• Choose from over 30 pre-defined charts and graphs in which to display data.

• Drill down deeper to find more answers.

• Refine data and focus on specific areas.

• Compare the success of one part of the business against another.

• Immediately see and understand your business's strengths and weaknesses.

• Be able to adapt quickly to market changesand business needs.

• Make informed decisions.

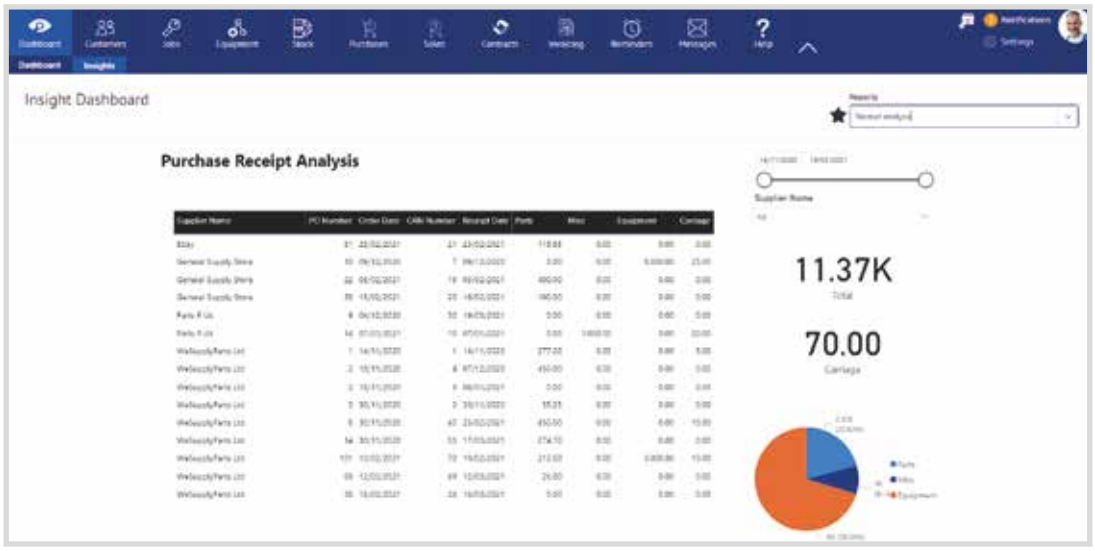
Get critical information to the right people at the right time
• Set automatic reminders, text messages or e-mails to provide early warnings of:
- Overdue purchase orders.
- Response times being missed on a job.
- And more.

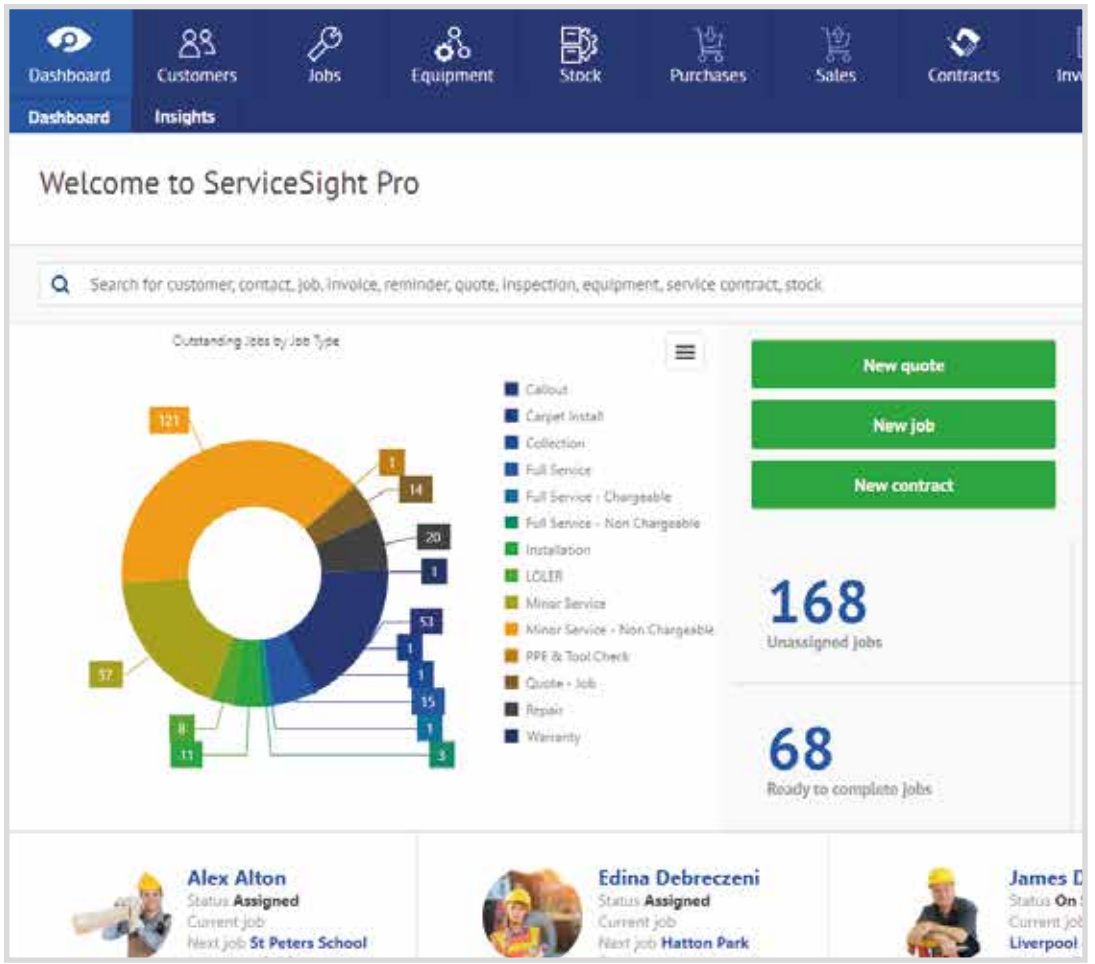
• Define the events ServiceSight checks for and how often it checks them.

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Business Intelligence and Reporting 1.2





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Client Web Portal

Client Web Portal at a glance

Enable your customers to self-serve and grant them access to key data from any device at any time, including KPIs, requesting jobs, accepting quotes or paying invoices

Key benefits

Allow your customers to self-serve

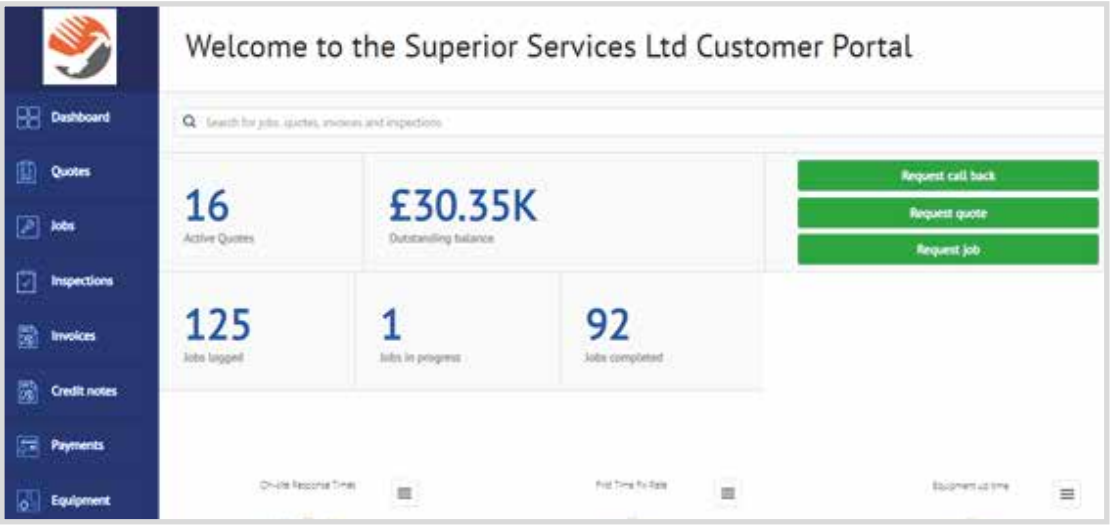
- Choose to enable customers to request jobs and see the details in your system immediately
- Customers can view, download & accept quotes online even when you are out of the office
- All jobs sheet, invoices & inspections are available for download at any time
- Enable customer to pay invoices online with our secure Stripe integration

Empower your customers with live KPIs

- See Live Jobs count
  - Open quotes
  - Monies Owed
- First-time Fix Rates
- Response Times
- Equipment Watch List

Delight your customers

- Enjoy live job updates & information
- Give them access to their data on your system safely & securely
- Log in is at Contact level and supports Sites, Customers & Managing Agents
- Can request a call back via the portal



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F-Gas

F-Gas at a glance

Get complete control over your refrigerant gas tracking and compliance. Manage built in and custom cylinder types and produce F-Gas logs for your customers with ease.

Key benefits

F-Gas logs

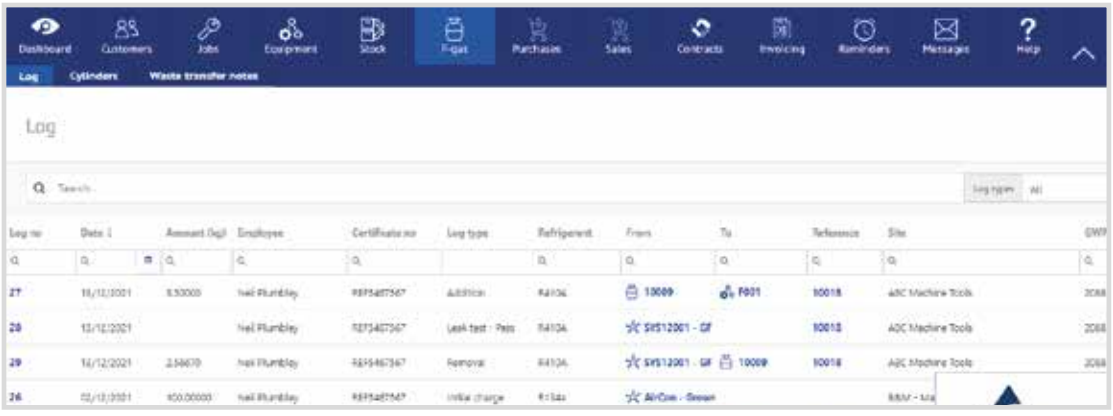
- Search and filter a master log to find any F-gas entry
- Drilldown available into each F-gas movement
- F-gas log available at Asset, System, Site, Customer and Managing Agent level
- Allow customer to view online in real-time

Gas cylinder management

- Create, import, or buy in cylinders
- Current weight and value updated automatically
- Minimise rental charges with return date tracking
- Complete cylinder movement history
- Full returns management from office or mobile
- View f-gas per cylinder

Manage refigerant types

- Add the refrigerant types you need
- Unique cylinder identification design system
- See refrigerant quantity and value in stock at any time.
- Set up supplier pricing options including cylinder sizes



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CRM/ Marketing
Equipment Register
Hire Agreements
Job Management
Mobile Engineers
Order Processing
Parts Control
Reporting
Service Agreements

ServiceSight FAQs

Is training available?
Choose from a range of training options including on-site, classroom and virtual. Elsewhere take advantage of an integrated help system that provides step by step 'how to' topics and pop-up help boxes for every field and command button on every screen.

What reports are available?
Easy to reach and easy to read management information is provided by standard charts & report dashboards providing you with the up-to-date information you need to make informed decisions.

What are the technical specifications?
Our solution is hosted securely in the cloud for you so all you need is access to a web browser such as Chrome, Safari, MSEdge or Firefox.

Does ServiceSight integrate with other software?
ServiceSight integrates with a variety of acounting systems including Sage 50, Xero & Quickbooks Online . Transactions in ServiceSight generate automatic updates into accounts system ledgers (sales, purchase and nominal). In addition ServiceSight can be integrated with many modern 3rd party applications via a full suite of API's.

Supported Browsers

Supported Integrations

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