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SERVICE MANAGER PRO

Program Introduction

Overview

Service Manager – Pro is a web based application for reporting, tracking and managing information about various service case activities on roof sections.

Service Manager – Pro works with the existing RoofPro Online and Enterprise versions providing additional functionalities to report and track service cases through the web with automatic updates to RoofPro once a service case is closed.

The highlights of the Service Manager Pro application are as follows:

- Authenticated secure access through the web via user name and password.
- Users limited to access of all or assigned facilities with user permissions controlling access to functions within the application.
- Comprehensive Service Case life cycle management
 - Up to 14 life cycle statuses to choose from
- Service Case dashboard for quick access to individual service cases
- Warranty Tracking
 - Flags users when service cases are reported for roofs with existing warranties.
 - Link the service case to the warranty if applicable
- Search Capabilities
 - Simple & Advance search tools for finding service cases and facility information.
 - Searches saved for quick retrieval
- Configurable Email Notifications
 - Customizable email messages for each step in the life cycle of the service case.
 - Service case status notifications via email for different users & groups on a need to know basis
- Attachments
 - Attach photos of work performed
 - Attach warranty, specification documents etc.
- QuickBooks Connector
 - Optional connection to QuickBooks for invoicing directly from Service Manager pro
- Reports
 - General Reports
 - Financial Reports

The generic life cycle of a service case in Service Manager – Pro deals with reporting a new service case, assigning it for inspections and work, tracking work progress, and then closing. As service cases are started warranty alerts display, work orders are generated and can be printed or attached to the email notification. Invoice information can be captured on completion. Service cases can be temporarily placed on hold or pending depending on circumstances.

Note:

Tools such as warranties, repair history help to identify and assign service cases against warranties for contractors/ manufacturers service, if applicable.

The following flow diagram depicts the tracking of a service case through various general roles in Service Manager – Pro

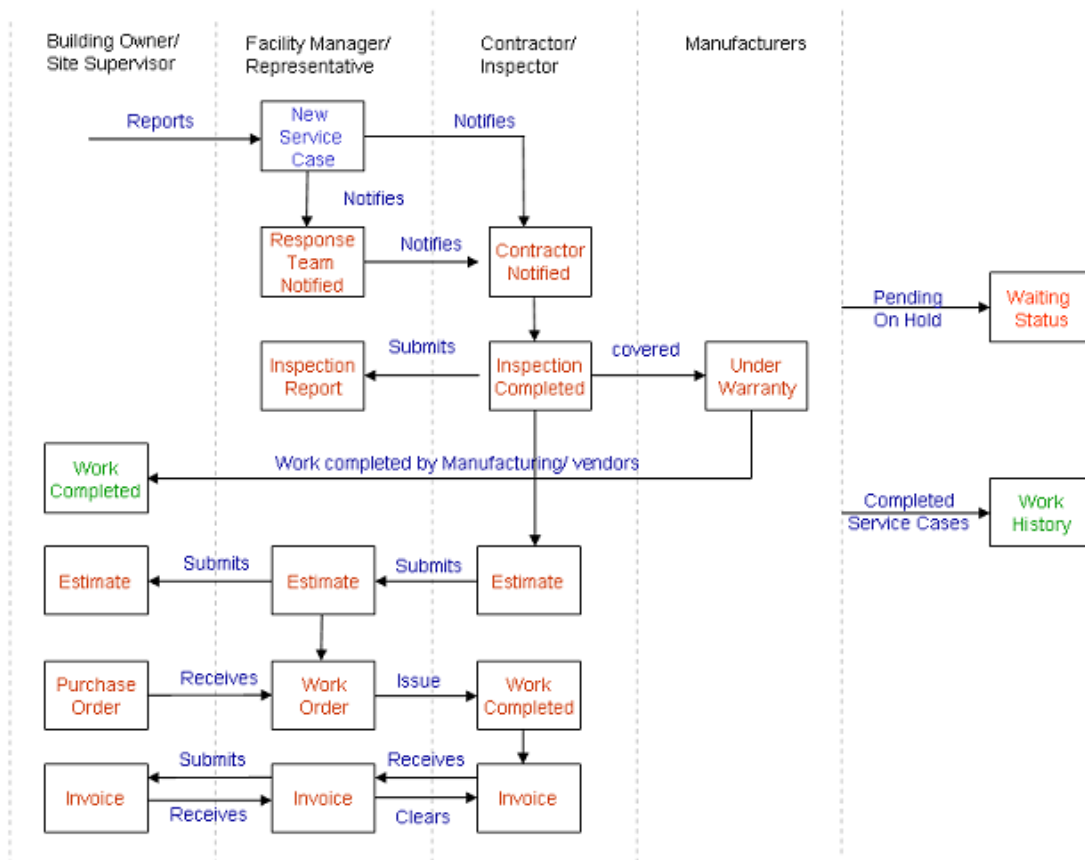



Figure 1 - Process Flow Chart

Email Notifications

Service Manager Pro provides an automatic email notification to notify service department personnel, client representatives and other stakeholders when a service case reaches certain statuses. An email ID is assigned to a service case status so that information will be sent to the interested party when the status is reached. An example of the email is shown below.

Subject: Inspection Completed - Service CaseID # 2009-1015

Attachments:  Work_Order[2009-1015].pdf (4 KB)

Hello

Service Case status has been modified from New Service Case to Inspection Completed. The details of the Service Case are shown below:

Service Case ID: 2009-1015

Location Details:

Client:	S & K Discount Stores
Facility Name:	Store#158
Facility Number /Brief Name:	S& K 158
City:	Detroit
State:	Michigan
Roof Section:	A

Service Case Details:

Service Case Type:	Repair Active Leak
Severity:	Critical
Current Status:	Inspection Completed
Reported Date:	04/17/2009
Reported By:	Administrator
Email:	admin@servicemanagerpro.com

Warranty Details:

Warranty Track Number:	FIR-92-0002
Issued Date:	04/07/1992
Expiry Date:	04/06/2012
Warranty Type:	Firestone\MANUFACTURERS
Warranty Company:	20 yr. manufacturer\MANUFACTURER WARRANTY
Warranty Notes:	

Inspection Details:

Inspected By:	James White
Inspection Date:	04/17/2009
Inspection Notes:	Leaks caused by several areas where membrane has split. Debris build up around drain areas was cleared durir inspection

Authorized users may logon to Service Manager - Pro application to view more details. <http://74.94.136.74/Chris/>

Note: This is an automated Email. Please do not reply to this Email.

Thanks and Regards,
Administrator - Service Manager Pro

Figure 2 - Sample Email Notification

Service Case Listing

Simple drill down navigation allows you to review lists of service cases for the current month or for a selected period. (See Fig. 3).

The screenshot shows the 'Service Cases List' page in the Service Manager Pro application. The navigation sidebar on the left allows filtering by Segment (S & K Discount Stores), Client (S & K Discount Stores), Facility (Store#158 (Detroit)\, Mic), and Roof Section (A - Shop area). The main content area shows a table of service cases for the selected filters. The table has columns for Service Case ID, Facility, Type, Reported By, Reported On, and Status. Two cases are listed: 2009-1013 (New Service Case) and 2009-1015 (Inspection Completed). The total number of service cases is 2.

Service Case ID	Facility	Type	Reported By	Reported On	Status
2009-1013	S & K Discount Stores\S & K Discount Stores\Store#158\A	Repair Active Leak	Administrator	04/15/2009	New Service Case
2009-1015	S & K Discount Stores\S & K Discount Stores\Store#158\A	Repair Active Leak	Administrator	04/17/2009	Inspection Completed

Figure 3 - Service Case Listing

Reports

Generate lists of service cases; service case detailed reports including photos; bills payable and receivable; service case lists under warranty, etc.


The screenshot shows a detailed report titled 'Willard County School Board\Oldershaw High School - Service Cases List'. The report includes a table with columns for Service Case ID, Facility and/or Roof Section ID, Service Case Type, Reported By, Reported On, and Status. Two cases are listed: 2009-1011 (Repair Coating) and 2009-1012 (Repair Active Leak). The report is prepared by the Administrator on 05/01/2009.

Service Case ID	Facility and/or Roof Section ID	Service Case Type	Reported By	Reported On	Status
2009-1011	Oldershaw High School, A	Repair Coating	Administrator	02/10/2009	Service Case Closed
2009-1012	Oldershaw High School, C	Repair Active Leak	Administrator	04/02/2009	Service Case Closed

Total Service Cases: 2

Prepared By: Administrator
Prepared Date: 05/01/2009

Figure 4 -List of Service Cases


Service Case Detail Report

Service Case ID #2009-1014

Service Case Details:

Reported Date: 04/15/2009
 Reported By: Administrator
 Service Case Type: Repair Periodic Leak
 Severity: Urgent
 Current Status: Inspection Completed
 Email: admin@servicemanagerpro.com

Location Details:

Segment Name: Hospitals
 Client Name: AAA Health Centers
 Facility Name: Trauma Center
 Roof Section Name: T-12 - Treatment Room

Address:

5694 Morgan Street
 San Francisco, California
 U.S.A., 94047

Service Case Description:

- Leak reported over rear entrance and in the corner of Trauma Room 1
- Check all areas for potential leaks
- Contact Administrator at ext 432 for access to theroof

Inspection Contractor Notified:

Contractor Name: White Roofing Contractors
 Inspector Name: John Smith

Inspection Completed:

Inspected By: John Smith
 Inspection Date: 04/17/2009
 Inspection Notes: Splits in various areas and build up of debris around drains is causing problems. Removed much of the debris during inspection.

Attached Photos:




Photo 1: Splits - 04/17/2009

Service Case History:

Seq #	Updated By	Status Change	Date
1	Administrator	New Service Case reported	04/15/2009
2	Administrator	Changed from New Service Case to Inspection Contractor Notified	04/15/2009
3	Administrator	Changed from Inspection Contractor Notified to Inspection Completed	04/17/2009

Prepared By: Administrator Prepared Date: 04/17/2009

Figure 5 - Service Case Detail Report

Summary

The Service Manager Pro solution provides roofing contractors, roofing consultants, and building owners with an easy and efficient way to report, track and manage information about roofing problems. Using Service Manager Pro's on line reporting, and automatic email notifications, roofing problems can be handled effectively and expeditiously.