

# ACCU-CALL - Call Management

## Overview

ACCU-Call is a sophisticated call management software package that is designed from the outset to manage your engineering calls, while giving you accurate costings per job, engineer and contract.

However, without controlling your stock, it is not possible to give accurate costs per job.

Therefore, we have designed the software from the outset to incorporate our ACCU-Stock package for controlling your stock, in both stores and vans.

A new directive from the DTI talks about Key Performance Indicators (KPI) as the method by which the performance of service companies will be judged, and new contracts issued based on this information.

The critical element from all sides is to provide information. This information is vital to the contractor, the client (housing association, local authority, MOD) and the tenant.

All information stored in the system can be accessed via standard reports, or you can use the Crystal report writer, the most widely used Windows based report writer in use in the world today, to generate your own reports.

The onus is on you, the contractor, to prove you are performing to the terms of your contract. To do this, you must log all calls in to a system, and whenever the status of the job changes, the client and tenant must be informed as to why, and when the new status is likely to be completed.

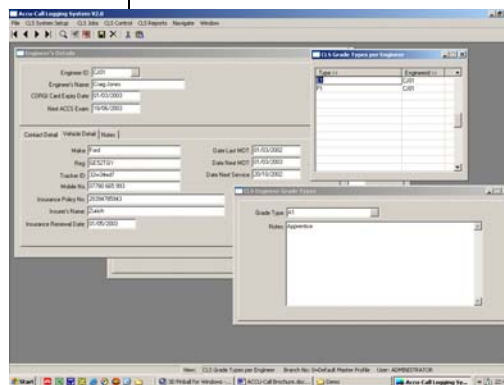
For example, if your contract says an emergency call must have an engineer on site within 1 hour, and your engineer turns up and he can not gain access, then a new job is recorded, and a letter is sent to your client saying that an engineer did arrive within the contracted time, and that they are now waiting for the Tenant to re-arrange a visit. The letter to the tenant tells them an engineer arrived, but couldn't gain access, and requesting them to telephone and make a new appointment.

In many service organisations, this does not happen, and results in the contractor not getting paid, the tenant not being happy, and the client may start to think about looking for a new contractor.

## Engineer Records

You can record up to nine qualifications against each engineer, each with an expiry date, as well as his vehicle details, including when an MOT, insurance renewal or service is due.

When the due date for any of these is approaching, as you allocate work to the engineer, the system gives you a warning, and can generate a job allocated to that engineer requesting him to do whatever task it is.



The system allows you to record the engineers Corgi registration number, Driving Licence details, Next of Kin and photograph.

You can store diarised notes on each engineer, with flag on each note to say it must be displayed when booking work. This can be used

to indicate parking tickets, warnings issued, tribunals attended etc.

You can record the skills of each engineer, helping you to allocate the most suitable person to the work required.

You can record absence for holiday and sickness, and when an engineer is absent, the system blocks you from allocating work to that person. You can generate a report on the number of days an engineer is absent.

## Client Records

The system can be configured to cater for clients that are individual house owners/occupiers, and for clients such as housing associations and local authorities that may own and/or maintain many properties.

The property is always treated as the key. People can move on, the property is always the constant point of referral.

The properties can be tied to contracts for individuals, or for the large clients, so you are able to report on the profitability of work carried out on a property, a contract and a client.



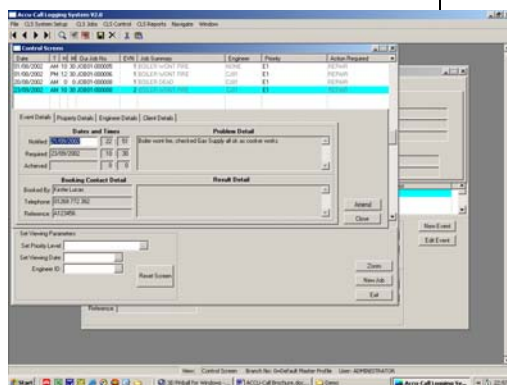
You can print a report detailing all temporary equipment that is on loan. If the equipment is never returned, the cost of the equipment can be included on the cost of the job. You can then generate a letter to the client and/or tenant, demanding the return of the equipment, or requesting payment for it.

You can print a customer satisfaction document with every job sheet. This is left with the tenant after the visit; the tenant then returns the form to the client, allowing the client to monitor the tenant satisfaction with your performance as the contractor.

## Controlling Jobs

If an engineer phones in sick, or is unable to cover the allocated work for whatever reason, this is recorded in his diary file for that day, and all jobs allocated to him are un-allocated and returned to the control screen, with a special priority so the controller knows this is work that has been promised, so it needs to be covered as a matter of urgency.

The jobs appear in order of priority, with the oldest jobs at the top, and the latest jobs at the bottom.



Each job has a date and time due, and this figure counts down as the time left for someone to attend nears.

The job is displayed in summary form, with an area code, a job type, abbreviated details, and client code, and you are able to zoom in on the job.

You can change the way the work is viewed on the fly. For example, the controller may be looking at the work to allocate for today, then switch the display to show the jobs for tomorrow that are waiting for spares to be delivered, then to work that is being done (i.e., work in progress by Engineer, Client, Property, Area)

To allocate a job to an engineer, you press a key or button, and a list of engineers appears. If the job type has been filled in, then only engineers that have that job type listed in their skills list appear.

The list is sorted so that engineers with no work on appear at the top, followed by engineers with the earliest appointment break.

You can look at each engineer's appointments for the day (tomorrow, the whole week ahead) so you can work out whether you are able to schedule in another job.

Once a job is allocated, it is taken off this screen so the person allocating work only sees jobs not yet allocated. However, you can recall the job by client, tenant, telephone number, engineer, job number and date range, so that if someone comes on the phone to ask where their engineer is, it is an easy task to find the job. Once found, if it has been allocated to an engineer, then the user should be able to see at a glance the other jobs that the engineer has got on, giving an indication as to when he might get to the job in question.

At some stage in the future, we may be able to link to the Tracker system, allowing the controller to see exactly where the engineer is in relation to the call.

You can un-allocate the job from an engineer, and/or re-allocate it to someone else. This allows you to cope with breakdowns and emergencies, and ensures the job details and costs are apportioned to the engineer that actually carries out the work.

Jobs can also be flagged as having been deleted, but are never deleted.

As each job is completed, it is flagged as done, awaiting parts, no access, so you know that the engineer is off that job and on to the next.

If the job requires parts, then the system checks your stock. You can see at a glance whether the required part is in your stores, or on an engineers van. If there is stock at head office, it can be allocated to the job and engineer, if it is on another van, the job can be issued to that engineer, or if it needs to be ordered, then a purchase order requirement is set on the product.

At a predetermined time, you or your storeman calls up a screen that shows all of the items that need to be ordered, and from the displayed list, you set about placing the purchase orders. The job reference is automatically added to the purchase order line item, so you can track when it is delivered to aid in completing the job.

If the item required is in stock but on another van, then the user needs to decide what to do, they may transfer the stock to the first engineer, enabling him to complete the job, or they may re-allocate the job to the second engineer that has the item on board.

When a job is completed, you can assign a category to the job, allowing you to report on potential problem areas. For example, you could run a report to tell you all the faults where a new PCB has been required on a certain make and model of appliance.