ServiceTracker User Guide

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ServiceTracker Overview

ServiceTracker is a full end-to-end business software solution, including streamlined quote and order management, and real-time contract and pricing management. Customer Services teams and labour planners have full visibility of what's happening in the field and know exactly the location of all field staff with fully integrated scheduling and mobile workforce optimisation using intuitive drag and drop screens and fully interactive calendars

The ServiceTracker field service mobile app allows users to update service visits or create electronic service sheets / log books / Inspections which can be automatically sent to the customer upon completion.

Contracts, billing and one-off quotes are all integrated to ensure invoices are created and dispatched at the earliest opportunity. ServiceTracker can then be fully integrated to all core financial systems.

Follow-up Task creation and scheduling is easy together with the creation of service actions for new issues discovered while on-site and knowledge base searches if help is required.

Customers can have access to their own online portal account via ServiceTracker's online Communities and they can be automatically informed of any recommendations or non-conformances in real time to ensure there are never any surprises following a customer field service visit.

ServiceTracker is also a Revenue Management and ERP solution providing a holistic view of both the customer and internal resources through effortless reporting.

The standardised use of one application running across the entire business ensures increased efficiencies are realised as well as decreasing total cost of ownership (TCO) so that leadership will quickly see the benefit of reducing operational costs and improving company profitability.

ServiceTracker Definitions

User – Username, password and profile of a licenced ServiceTracker user

Resource – A member of staff or piece of equipment that can be associated with a Visit

Resource Category – The financial details of any given resource (Cost and Charge)

Skill – Certifications, licenses and training details for a specific resource

Service Territory – A method of grouping Clients and Resources for Servicing

Products / Price Books – The products, services and customer specific pricing for any items that are sold/provided

Client - Competitor, Customer, Subcontractor, Partner and Prospect Addresses

Contact – Individuals who Work at an Account

Inspection Item – Any Item to be inspected as part of a Service Contract.

Contract/Job – A written agreement for services provided to a customer

Schedule – Specific details of any services to be carried out as part of the Contract

Schedule Item – Inspection items specifically related to a schedule of work

Visit – Details, dates, record assignment, completion history of visits that are carried out as part of a Service

Inspection – Details of any Inspection Items that are inspected as part of a visit.

Action – Actions to be completed if required from each inspection or visit

Quote/Invoice/WO – Service Quotations, Invoice management and Work Orders

Report – Access to data stored in ServiceTracker

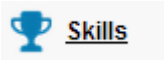
Dashboard – Visual representation of data collected and stored in ServiceTracker

1. ServiceTracker Setup and Configuration

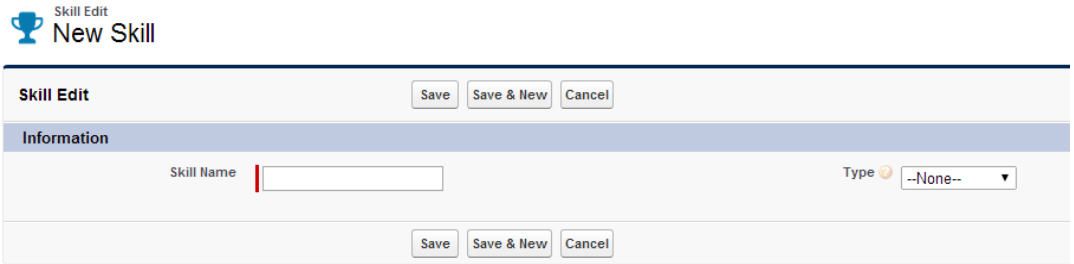
1.1 Creating New Users

To setup new users, profiles and roles, please see Salesforce Help and Documentation pages.
https://help.salesforce.com/htviewhelpdoc?err=1&id=admin_users.htm&siteLang=en_US

1.2 Creating Skills

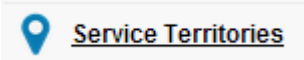
- From the **All Tabs** menu (**+** on the tab bar) click on the Skills Icon 

to access the skills view
- Click New
- Enter a Skill Name and select a correct Type from the picklist (See standard Salesforce documentation for picklist editing)

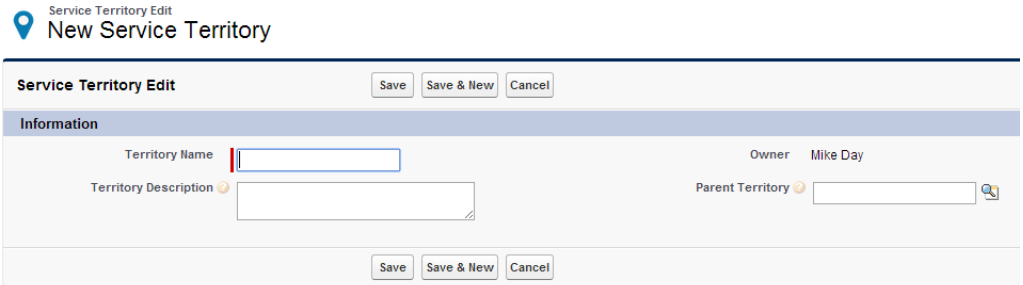


- Click Save

1.3 Creating Service Territories

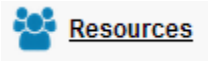
- From the All Tabs menu click on the Service Territories Icon 

to access the Service Territories view
- Click New
- Enter a Service Territory Name, Territory Description and Parent Territory if applicable

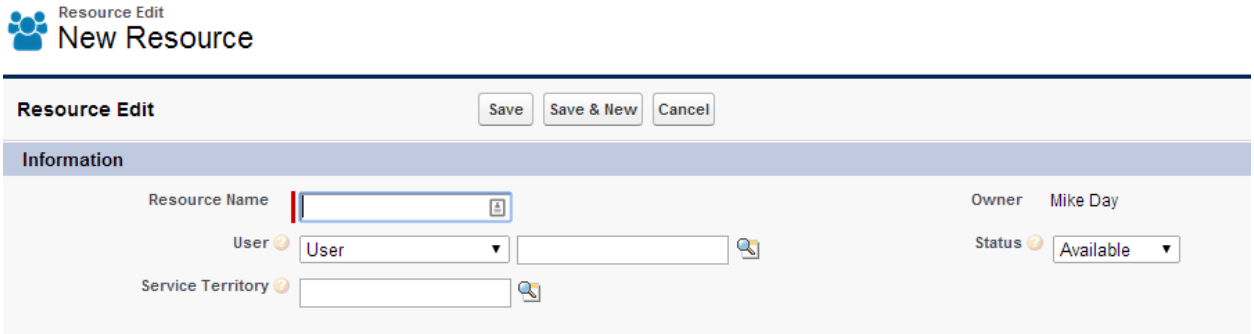


- Click Save

1.4 Creating Resources with Skills and Service Territories

- From the All Tabs menu click on the Resources Icon 

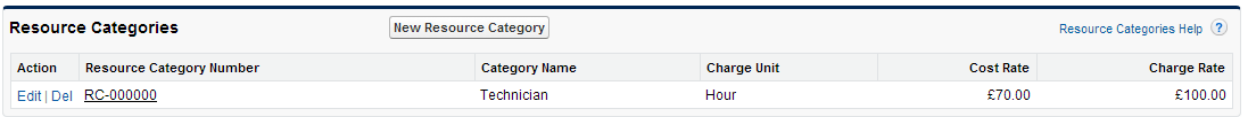
to access the Resources view
- Click New
- Enter a Resource Name
- Enter a User Name (if you are not setting up a sub-contractor or equipment)
- Enter a Service Territory



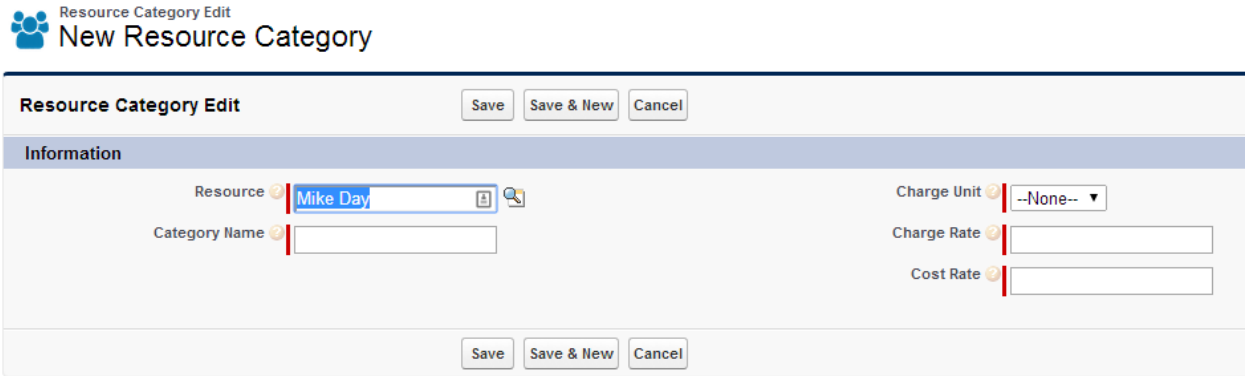
- Click Save

1.5 Creating Resource Categories

- From the new Resource detail page click the New Resource Category button



- Enter a Category Name (i.e. Standard Service), Select a Charge Unit from the picklist (See standard Salesforce documentation for picklist editing), enter a Charge Rate and a Cost Rate



- Click Save

1.6 Creating Products & Pricebooks

To add new products and pricebooks please see to the Salesforce Help and Documentation pages
https://help.salesforce.com/htviewhelpdoc?err=1&id=products_overview.htm&siteLang=en_US
for more information

2. Creating New Clients

2.1 Create a Client with a Service Territory and Pricebook

To create a Client (or standard Salesforce records), please see the standard Salesforce Help and Documentation pages
https://help.salesforce.com/htviewhelpdoc?err=1&id=account_overview.htm&siteLang=en_US

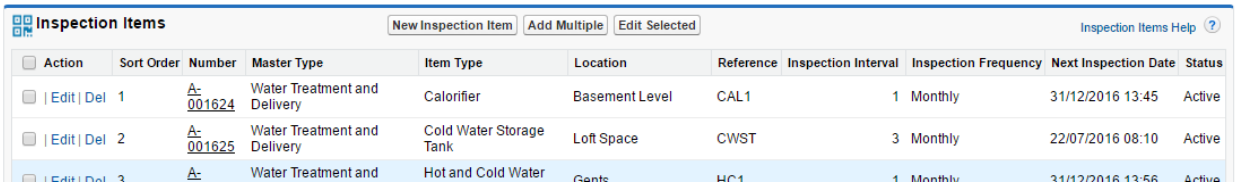
When the Account has been created, select a Service Territory and Pricebook from the lookup on the Client detail page

2.2 Create a Contact

To create a new Contact please see to the Salesforce Help and Documentation pages
https://help.salesforce.com/htviewhelpdoc?err=1&id=contacts_edit.htm&siteLang=en_US

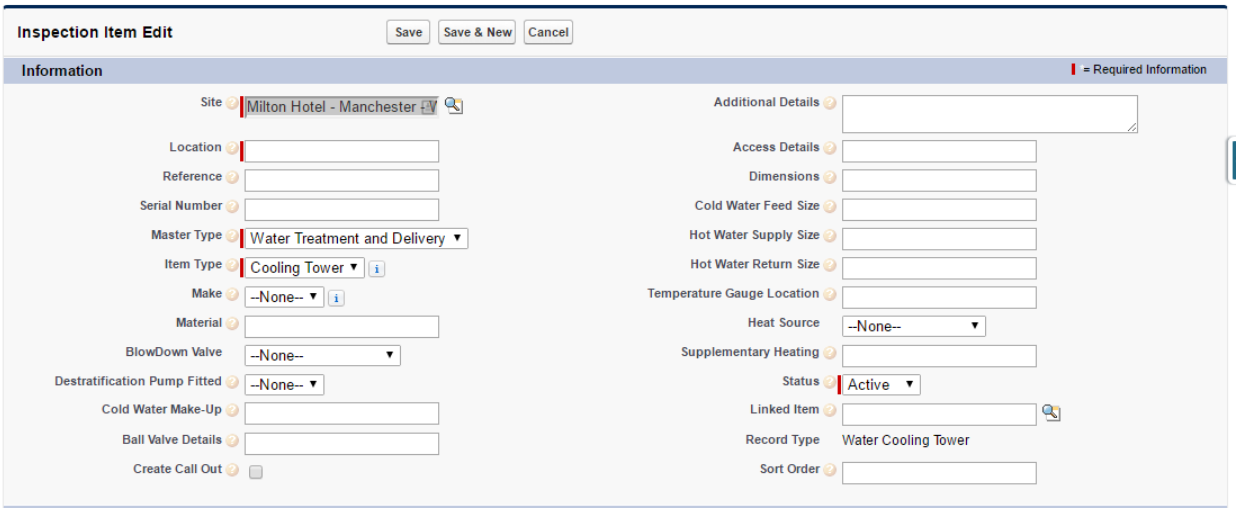
2.3 Create Inspection Items

- From the Client detail page click on the New Inspection Item button to create a single Service Item or click the Add Multiple* button to create multiple records at once



Action	Sort Order	Number	Master Type	Item Type	Location	Reference	Inspection Interval	Inspection Frequency	Next Inspection Date	Status
| Edit | Del	1	A-001624	Water Treatment and Delivery	Calorifier	Basement Level	CAL1	1	Monthly	31/12/2016 13:45	Active
| Edit | Del	2	A-001625	Water Treatment and Delivery	Cold Water Storage Tank	Loft Space	CWST	3	Monthly	22/07/2016 08:10	Active
| Edit | Del	3	A-	Water Treatment and	Hot and Cold Water	Gents	HC1	1	Monthly	31/12/2016 13:56	Active

- Select the Correct Record Type (if applicable) then select from the Master Type picklist, Item Type picklist and Make picklist (see Salesforce Help and Documentation for assistance on creating new picklist items)
- Enter any additional details, the Location, Serial Number, Inspection Interval, Inspection Frequency, Anniversary date and any Grace Days required.



- Click Save

You can edit all Inspection Items by selecting the Inspection Items from the list and clicking the Edit All button

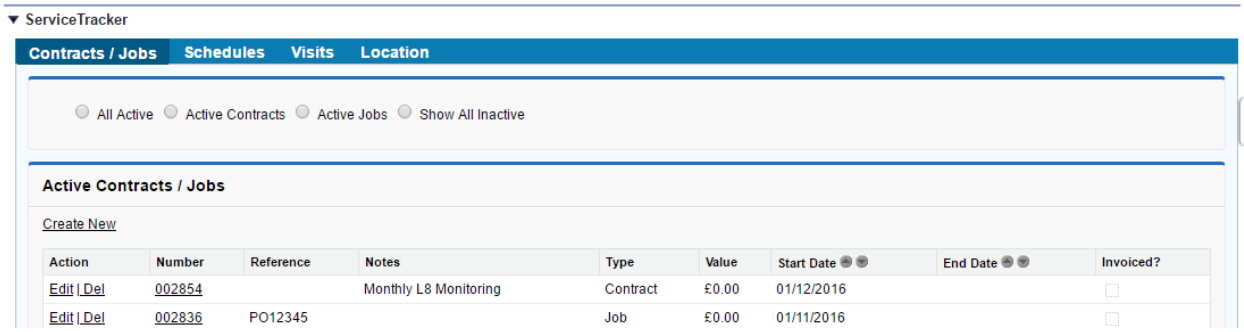
* Screens may vary from Single and Multiple record insert

3. Create a Contract/Job & Schedule

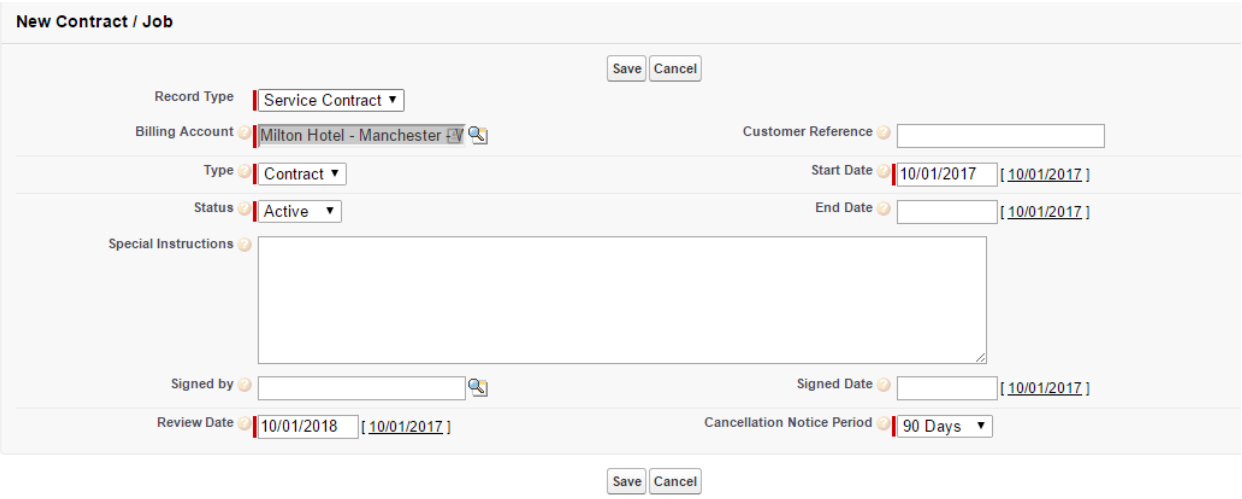
3.1 Create Contracts and schedules

Part 1 - Creating the Contract

- From the Client detail page (you must create the client first), go to the Contracts/Jobs section of ServiceTracker and click the Create New button



- Enter the Service Type, Customer Reference (if applicable), Start Date, End Date (if applicable), Special Instructions, Signed By name, Signed by Date, Review Date and Cancellation notice period. (see Salesforce Help and Documentation for editing picklist values)

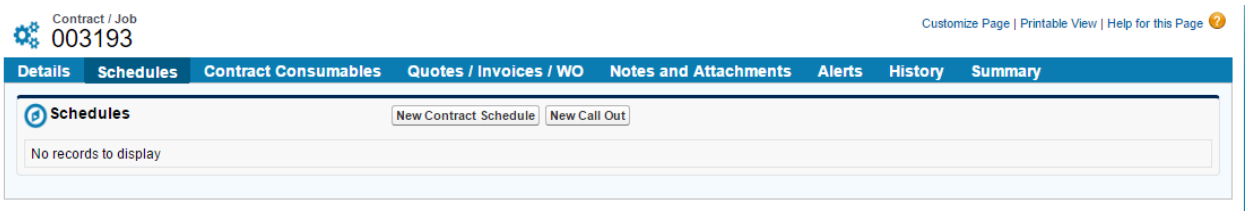


- Click Save

NB: You can add more detail to the contract such as Invoicing details, consumables, portal sharing rules etc. by editing the Contract once it has been created

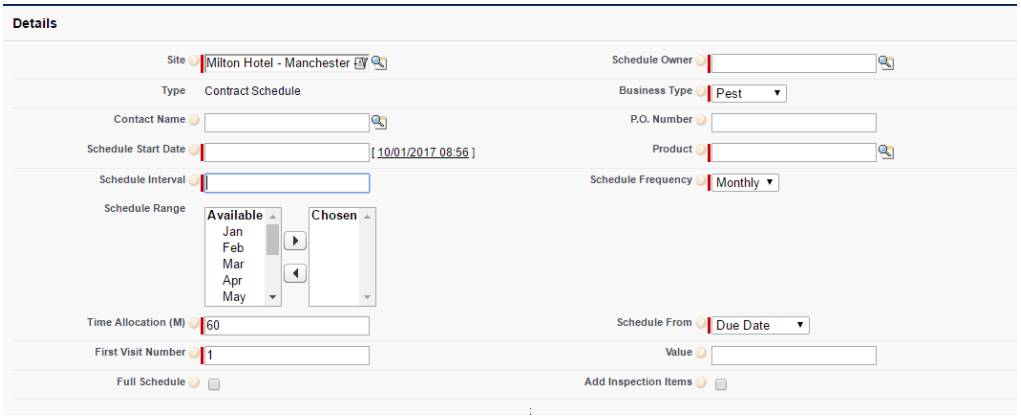
Part 2 - Create the Schedule

- Once you have created the new Contract / Job, go to the schedules tab within the new contract record and click one of the “New” buttons to create the schedule (these buttons will change depending on the contract type)



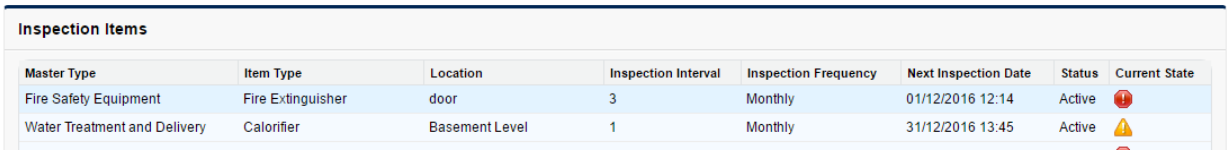
- Enter the details of the new schedule, including the frequency (a drop down list of date ranges) and the interval (the corresponding number to work with the frequency) together with any mandatory fields. Here are some tips:

  - **Schedule Owner** – This is the resource that is responsible for completing the visits. You can assign the schedule owner to a sub-contractor or a queue depending on how you have created your resources
  - **Schedule Start Date** – This is the date of the first visit
  - **Product** – This is taken from your product table and will be created at the setup/config stage. The product determines the price of the schedule and is taken from the pricebook on the client record
  - **Schedule Range** – This is only applicable when Monthly or Weekly is selected. You can choose the months or days of the week that any visits will be scheduled
  - **Time Allocation** - This is the time you would expect a visit to be completed. It can be changed at a later date if required
  - **First Visit Number** – This should be set to the current visit number if working with a calendar year. i.e. visit “7” of 12 if starting in July
  - **Schedule From** – The options here are to create the next visit from either the original planned date, the due date (if changed from the planned date) or the completed date
  - **Full Schedule** – This means all visits will be created when the record is saved. If you do not select this, only one visit will be created and the system will automatically generate the next visit upon completion
  - **Add Inspection Items** – This keeps adding any Inspection items from the account into the schedule and therefore the visits



- Click Save or Save and New to enter additional services for the Service Contract

NB: You can use the Inspection Items list at the bottom of the page as a guide to ensure you create a correct Service Schedule



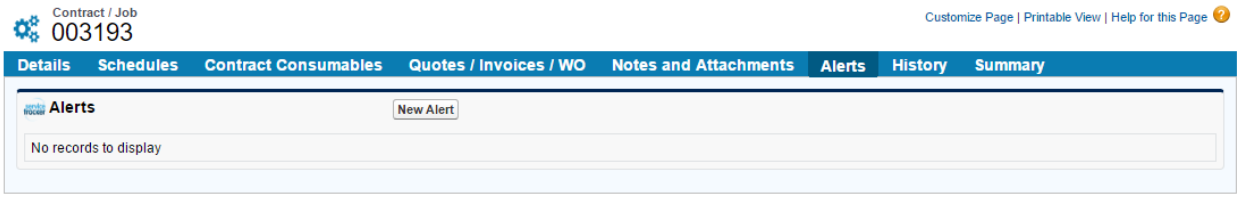
Inspection Items

Master Type	Item Type	Location	Inspection Interval	Inspection Frequency	Next Inspection Date	Status	Current State
Fire Safety Equipment	Fire Extinguisher	door	3	Monthly	01/12/2016 12:14	Active	
Water Treatment and Delivery	Calorifier	Basement Level	1	Monthly	31/12/2016 13:45	Active	

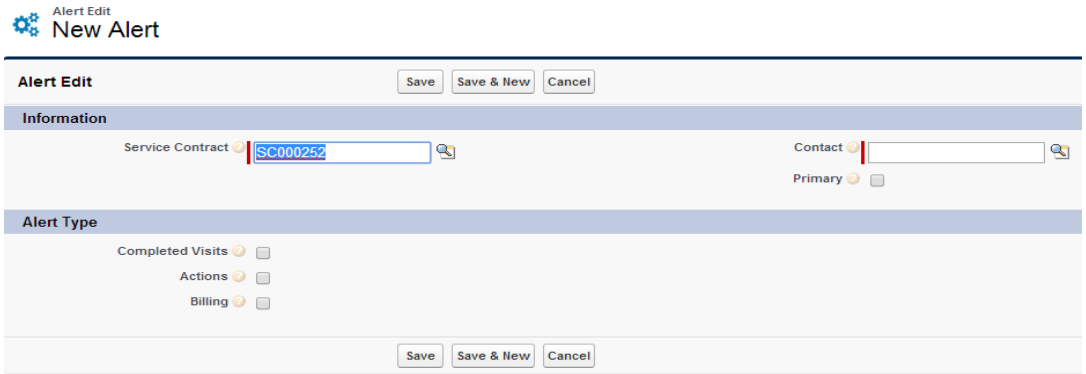
The Contract, Schedule and Associated visits have now been created and assigned to the Schedule Owner ready for completion or planning.

3.2 Create Alerts

- From the Contract/Job screen or the Schedule screen click the Alerts Tab and click New Alert



- Enter the Name of the person who will receive the Service Contract Alerts (you will need to create the contact record first as per 2.2) and Check any required boxes to state the type of Alert they will receive.

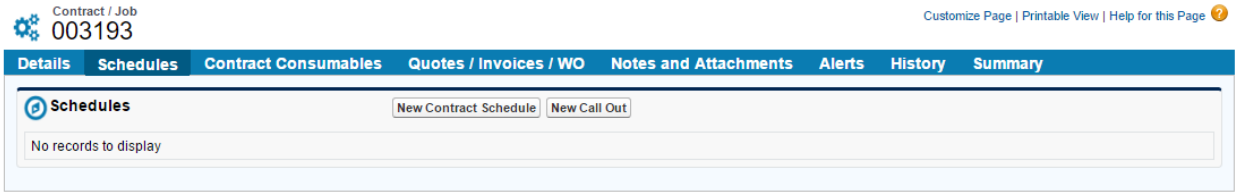


- Click Save

NB: If you are creating Alerts from the Contract/Job screen, alerts will be sent out for any associated schedules. If creating an alert for a schedule, the alerts will only ever get sent from that particular schedule

4. Create additional Schedules

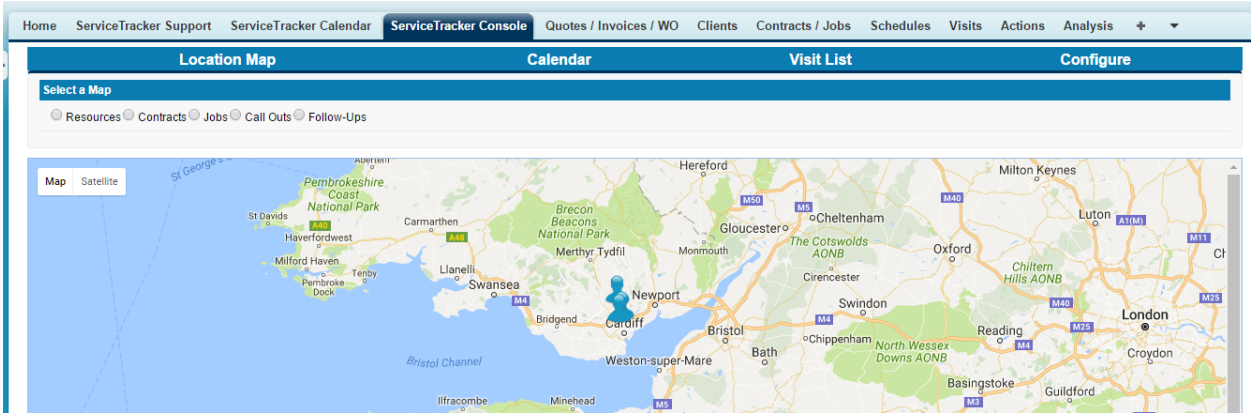
- Click on the Schedules Tab of the Contract/Job Detail Page and Click New Schedule



- Follow the steps listed in guide **3.1 Part 2** to complete the Schedule insert page

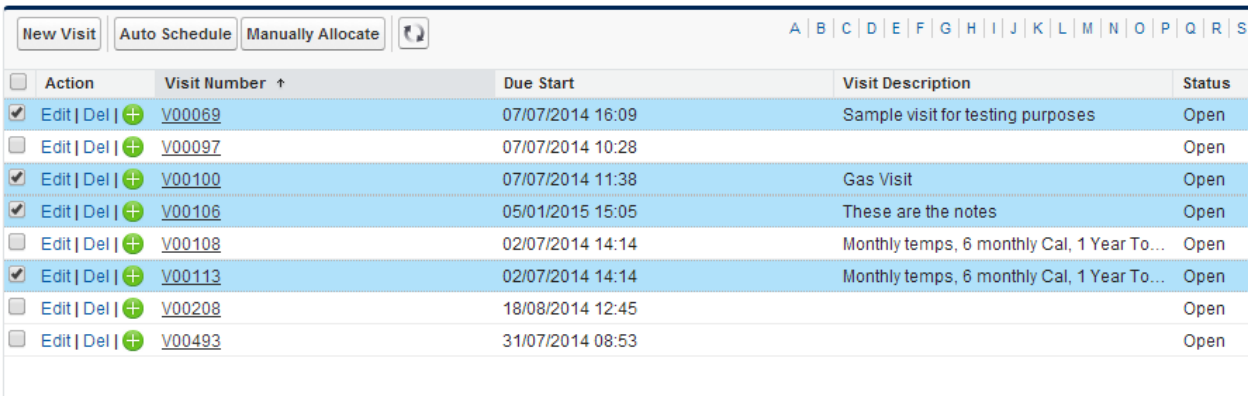
5. The ServiceTracker Console

Click on the ServiceTracker Console Tab along the Navigation bar (or go to the + button first and select it in the list of tabs). From here you can access the location map of all resources, clients, contracts etc, view all visits on a calendar, access the visit list or configure the system.



5.1 Automatic Visit Allocation using the Visit list

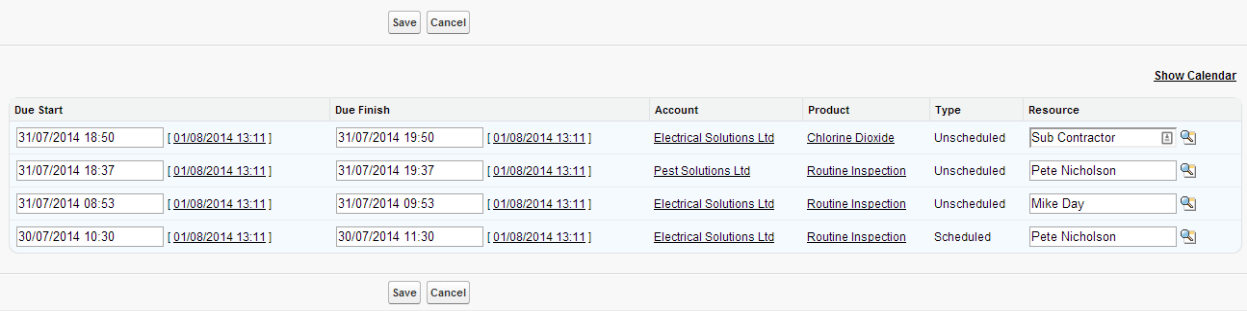
- Click on the Visit List at the top of the console
- Select or Create a new view (see Salesforce help for creating new views)
- Select the Visits to Automatically Allocate and click on the Auto Schedule Button



- This will now search for all Visit Service Territories and Assign the Visits to the Corresponding Resources with the Same Service Territory

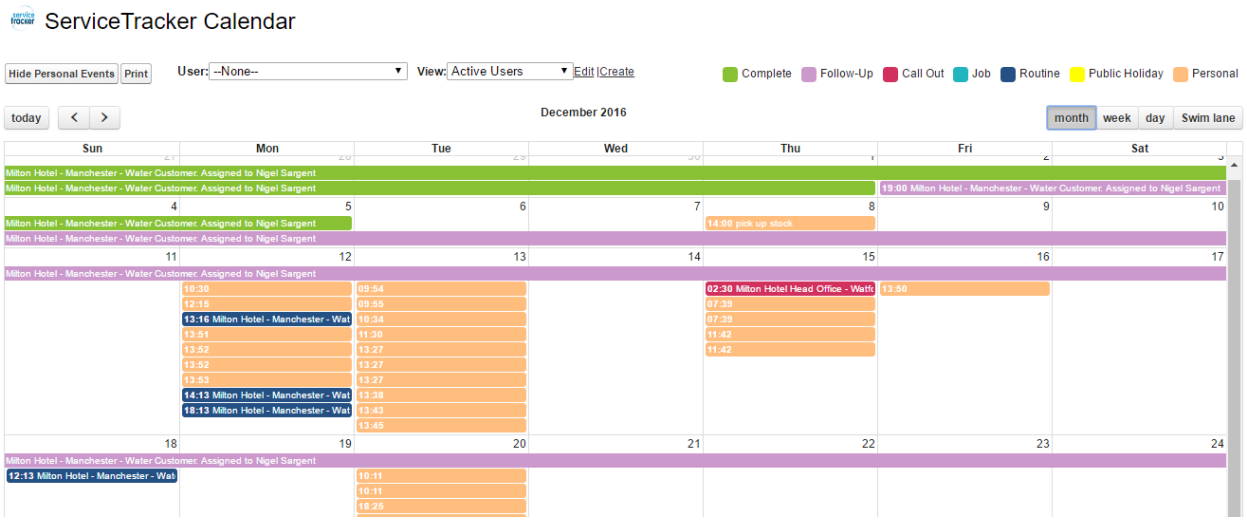
5.2 Manual Visit Allocation using the Visit list

- Follow the Steps shown for Automatic Allocation and click Manually Allocate instead of Auto Schedule from the View

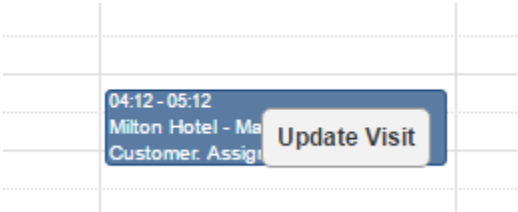


5.2 Manual Visit Allocation using the Calendar

- Access the Calendar by clicking the Calendar option in the ServiceTracker Calendar



- You can edit the Due Start, Due Finish and Resource by right clicking the calendar entry or, update the Due Start and Due Finish only by using the drag and drop features



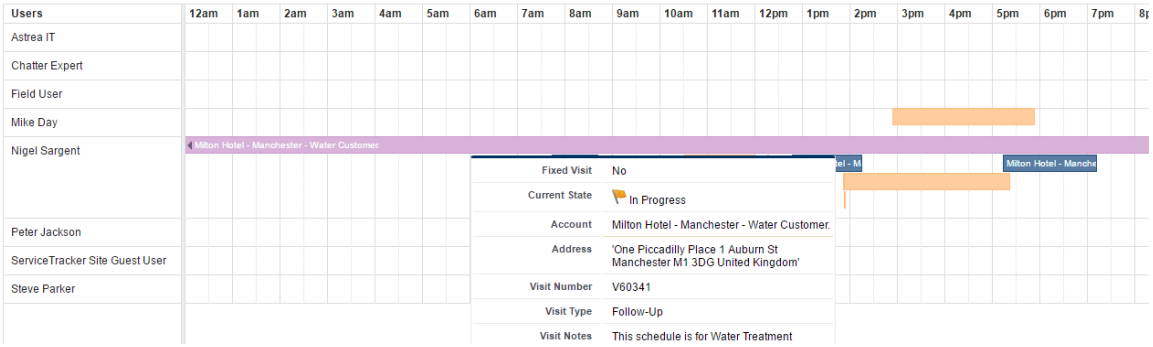
6. Managing Calendars

6.1 Using the ServiceTracker Calendar

- From the Calendar page you can select a particular user or a collection of users using the View. To create a new view see the Salesforce help pages

- Once you have selected either the user or the collection of users you can navigate the Calendar as follows:
  - Navigate the Days, Weeks, Months and years using the left and right arrows

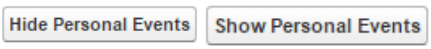
  - Select the Calendar screens using Month view, Week view, Day view or Swim Lane view (to see all users in a matrix)



Swim lane View

  - Use the Key to ascertain the types of visits being shown in the Calendar

  - Show or Hide and personal events, including public holidays, office appointments, sales appointments etc

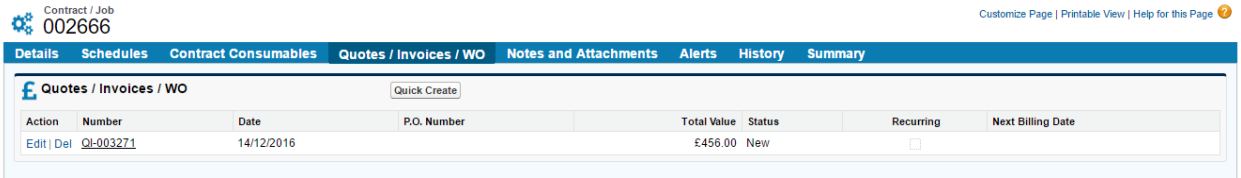


  - Roll your mouse over a calendar entry to view the detail and current state

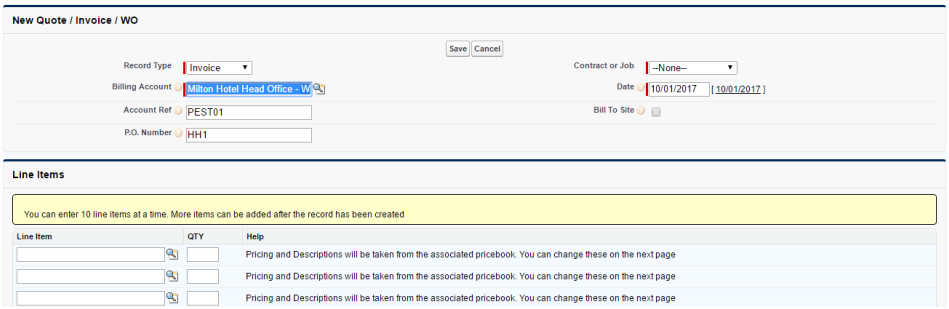
7. Creating Quotes, Invoices or Work Orders

7.1 Creating a Quote/Invoice/WO and Line Items

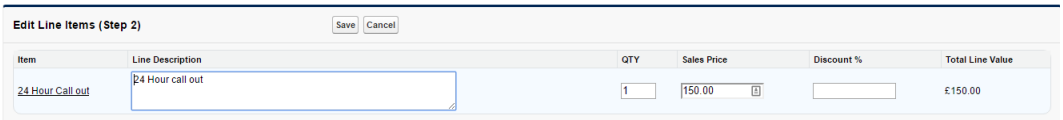
- From either the Client, Contract/Job, Schedule or Visit Detail pages click the Quotes/Invoices/WO Tab and click “Quick Create”



- Enter The RecordType (Quote, Invoice orWorkOrder), enter the date and select Contract or Job Work

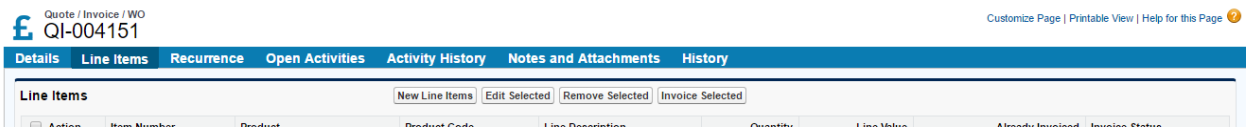


- Select any Line items using the Lookup to the product and enter and Quantity
- Click Save to go to the next step
- Enter the Line item description and add any discount, amend the price etc. if required



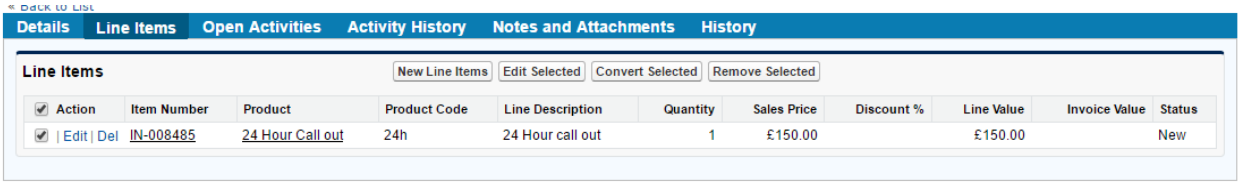
- Click Save to create the record
- Click Print or Email (Depending on your setup) to generate the document

NB: You can amend, remove or add new line items using the Line Items tab within the Quote/Invoice/WO record

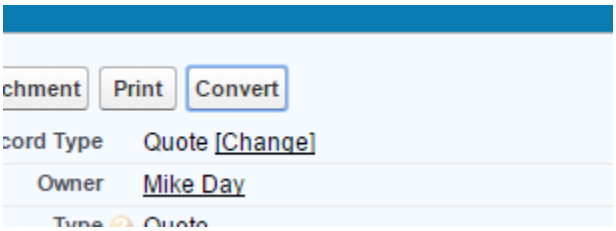


7.2 Converting a Quotation

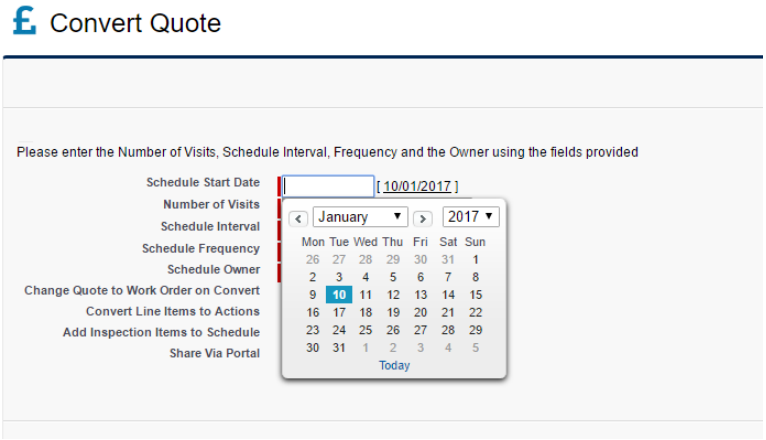
- To convert a quotation to an Invoice or Work Order, click on the Line Items tab and select the items you wish to convert



- Click Convert Selected (you will be prompted to accept the conversion then taken to the detail tab
- Click Convert at the top of the screen



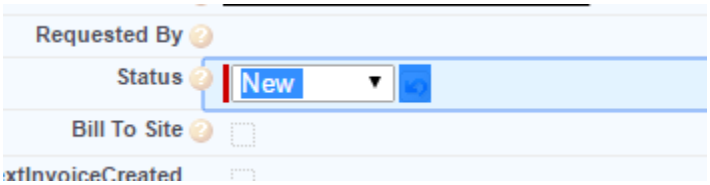
- Follow the on-screen wizard to create the contract, schedule and visits and to associate the quotation with the new record. At this stage you can change the Quote to a Work Order or leave it as a quote for another conversion



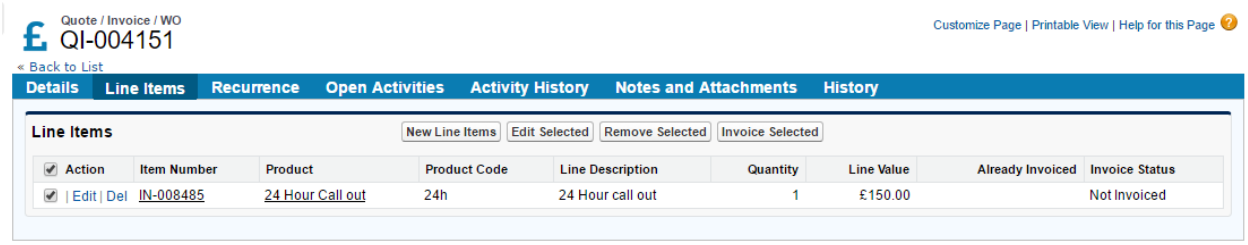
7.3 Invoicing

With ServiceTracker you can part invoice selected line items or the entire invoice depending on how the system has been configured to work with your finance system

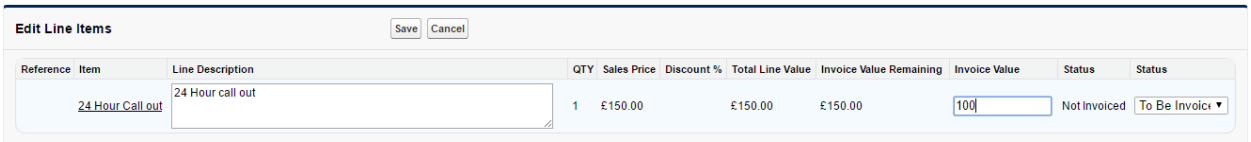
To simply invoice the entire record, you can change the status of the invoice to “Send to Finance System”. This will then mark the record ready for sending



To select specific values or items, firstly go to the Line Items tab, select the records you would like to invoice then click “Invoice Selected”

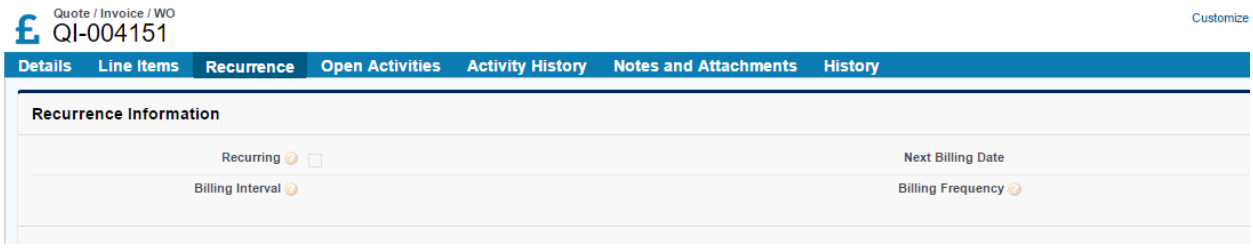


Enter the values you would like to Invoice, change the line item status to “To be Invoiced” and click save before changing the status of the invoice to Send to Finance System”.



7.4 Set Recurring Invoice reminders

- Click the Recurrence tab on the Quote/Invoice/WO record (The Quote must be related to a contract with the correct invoice settings entered see 3.1)

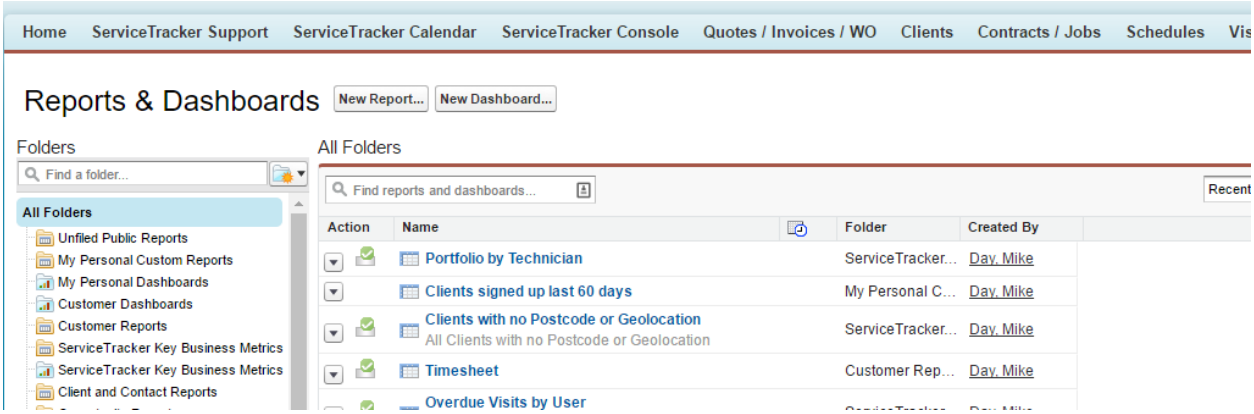


- Check the Recurring Flag so that the record appears in reports and set the Billing Interval, Next Billing Date and Billing Frequency
- Click Save

8. Reports and Dashboards

8.1 Accessing the Report features and individual reports

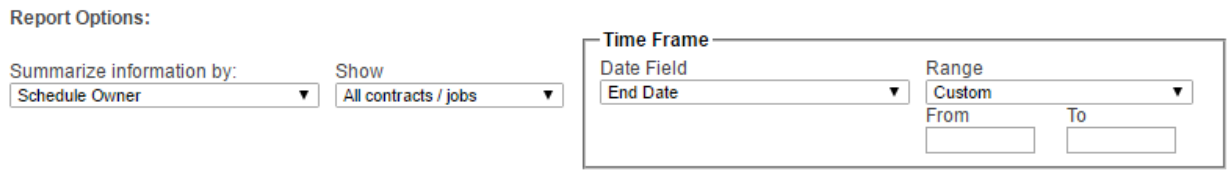
- From the Tab bar (or the + at the top) select “Reports”



- You can search for a folder using the left pane and search area or for a specific report/dashboard using the right pane search
- Click on the Report or Dashboard you would like to view

8.2 Running a report

- Once you have selected the report you can change some of the parameters using the date ranges and filters

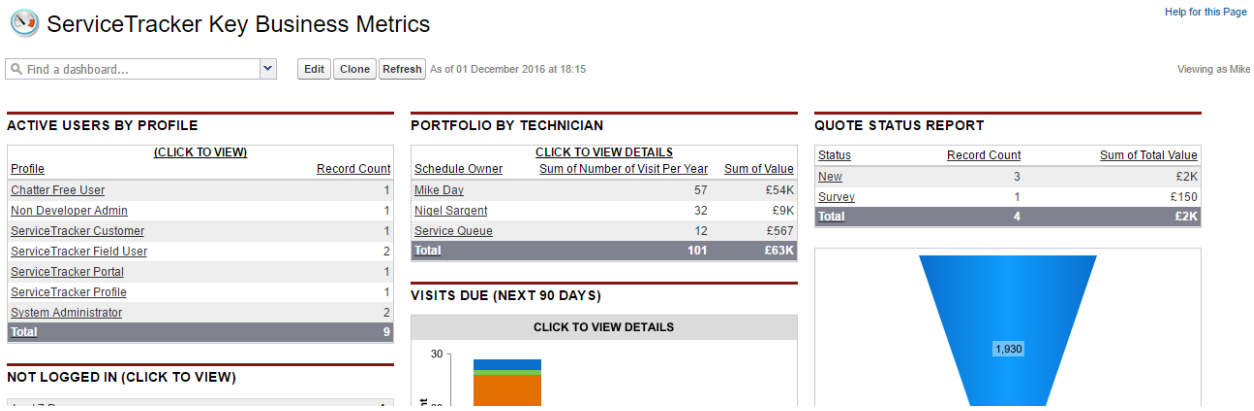


- Once you have selected your report options you can then click the “Run Report” button to view the changes

- You can also export all the details to an Excel or CSV using the Export Details button or Printable View

8.3 Viewing a Dashboard

- Once you have selected the Dashboard you would like to view from the Reports list you can then drill down into the detail by clicking into any of the charts



NB: You can also change Dashboards using the “Find a dashboard…” area at the top of the screen

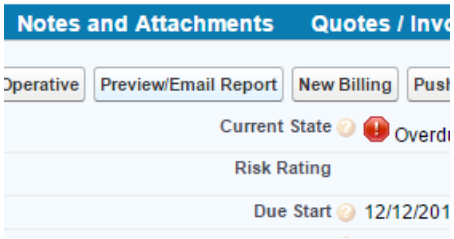
9. Documents, Certificates and Files

ServiceTracker is capable of creating and storing many different types or records. You can generate and send quotations, invoices, service sheets, certificates, contract documents and much more depending on how your system has been setup

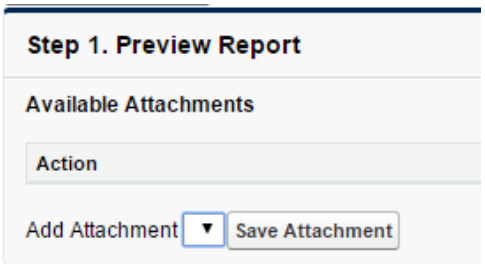
ServiceTracker also acts as a document repository/E-Log book for customers and mobile users.

9.1 Generating and sending Visit reports / Service Sheets

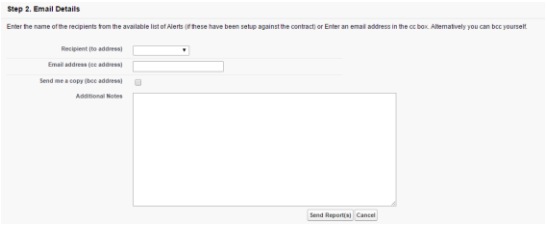
- Within a visit record you can click the Preview/Email report button to access the document screen



- Select the Report you would like to generate using the list of available reports and click Save Attachment

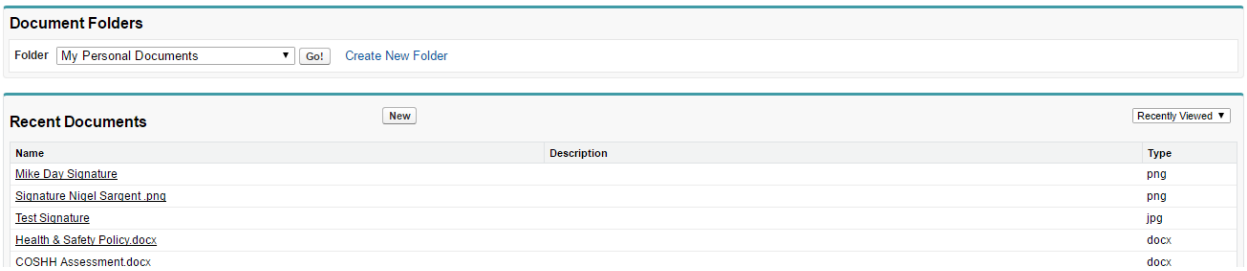


- You can now either view the generated document or send it via email using the email feature in Step 2 of the page

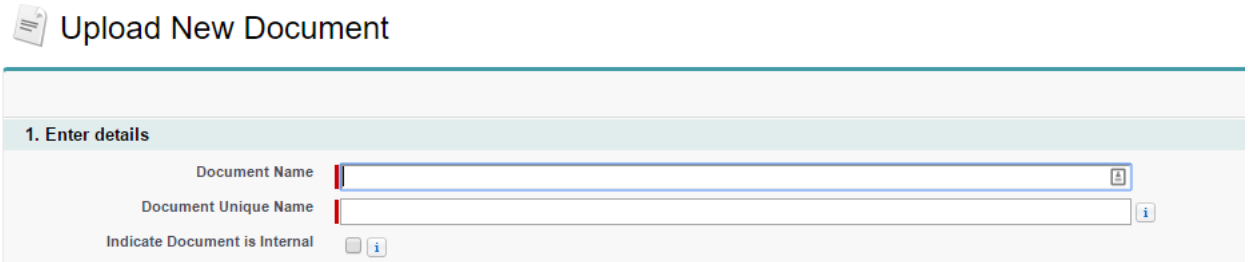


9.2 The Documents tab

- From the tab bar (or +) click Documents



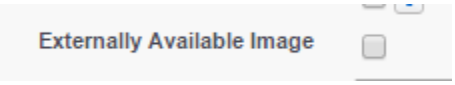
- Select or Create a new document folder
- Click on the document to view the detail or click “New” and follow the steps to upload a new document



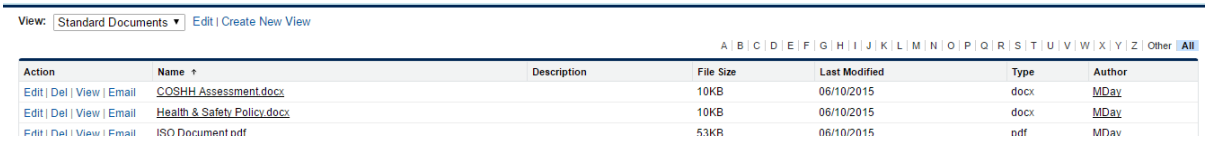
9.3 Standard Documents (for mobile and portal users)

Standard documents are used to allow mobile and portal users visibility of your documents such as Health and Safety, COSHH, MSDS etc.

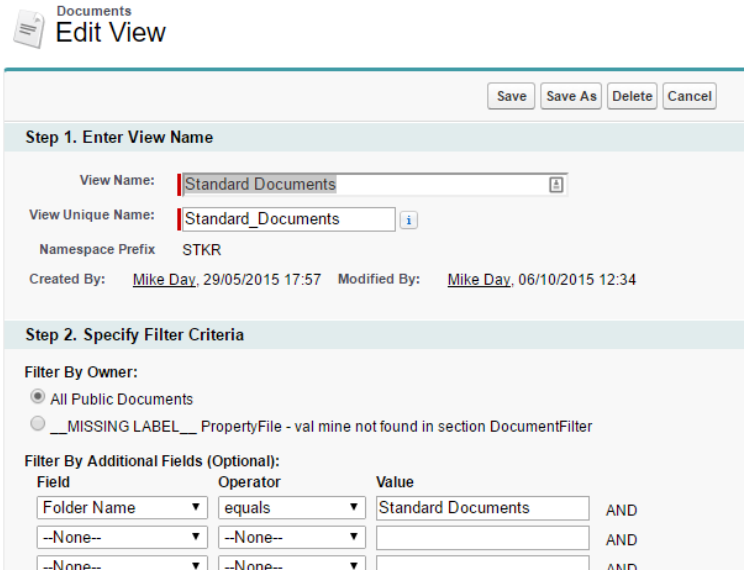
- Ensure that you have created a document folder and the document you would like to share exists and has been given permissions for external access



- From the tab bar (or +) click Standard Documents



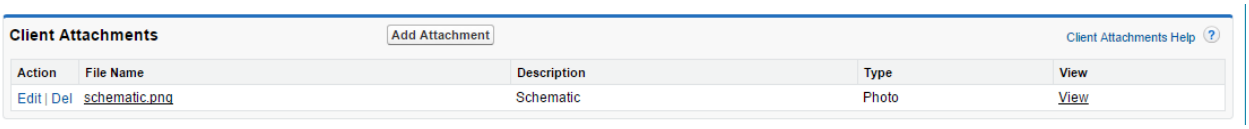
- Create a new view to the folder you would like to share



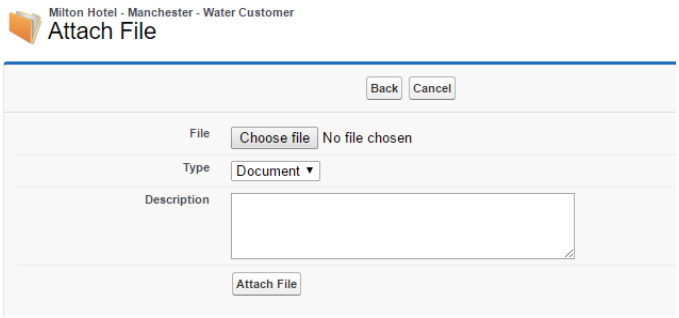
- Give the view a name, select the folder you wish to share and allow permissions for all users to have visibility
- Click Save

9.4 Client Attachments

Client Attachments are files related specifically to a client or site for reference via the web, portal or mobile. These would typically include schematics, contract documents or important information related to the site.



- Click the View link to access the file
- Click Add Attachment to upload a new file



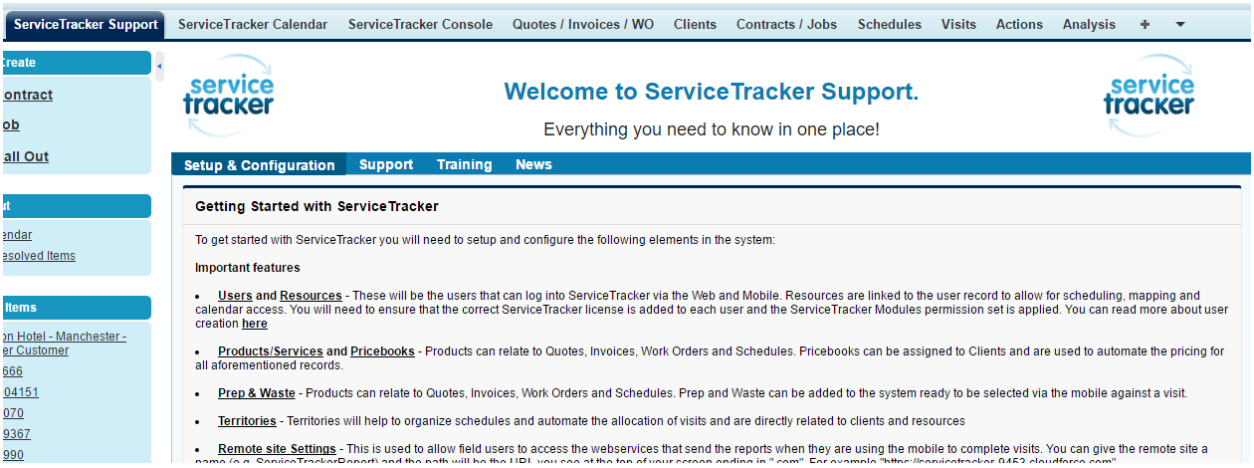
10. Other Information and Features

We are constantly updating the ServiceTracker application depending on our customer requirements and as such there are many features not covered in this manual or yet to be developed.

You can always check the release notes on our website to keep up to date with new features and changes and we will send a mail-shot when changes are due to be applied

http://www.servicetrackersystems.com/blog/support/

The ServiceTracker support tab (accessed at the top of the screen or using the +) will provide you with all the important setup features, training, news and access to the support console



For any other support related queries, comments or feature requests, please email us at support@servicetracker.uk.com