Service Management
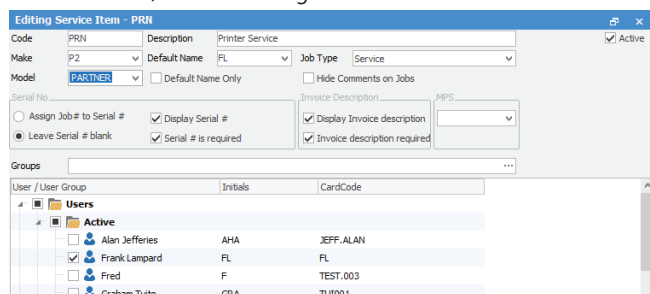Jim2® Business Engine

Fact Sheet

Define your Services

The Jim2 **ITEM** record allows you to define a given service (or sales) task. That definition includes:

Responsibility – nominate the user/s most capable of, or trained to perform this type of task.

Accuracy – specify what needs to be recorded each time this task is attempted, including Item serial number, fault description, 'fix' description.

Quality – set specific checklists for users to follow when given this task. These tests and checks must be 'signed off' and will automatically record time/date/initial for your records. This can include known ECO's for make/model servicing.

Inventory – predefine labour charges and inventory usage against a task to ensure all costs are captured and charged.

Monitoring – choose to track service items by make/model or by broader 'groups' to ensure relevant reporting.

Efficiency - Jim2 Reports include print/fax/emailable 'onsite' forms, personalised with the details of each specific job.

Live drill-down workflow overviews

- Staff and management can create their own lists of service Jobs to monitor and work from.
- Mouse-click drill down to individual Job records to view or edit.
- Jim2 includes 'live lists' that can be set to refresh at specified intervals, so users can keep an eye on Jobs as they change status.
- Easily sort columns using drag-and-drop to create your preferred views.
- 'Pin' lists in place to stop them being closed inadvertently.


Automated due date/due time

- Defaults can be set (globally) to calculate realistic turnaround (days and hours) for each new Job entered on your system. This sets the benchmark for your team to complete each Job.
- Your working hours are pre-set to ensure 'Due date' relates to actual trading hours. Jim2 will then calculate an expected due date and time using only valid trading hours.
- Sort your Job list by 'Due Date' or 'Status Due Date' to check performance (overdue Jobs will be listed in red).

In Object	In List	Active	Status	Responsibility	Comments	Due Days	Due Hours	Due Mins	Sec. Lew	Exclude from	Exclude from	Publish Status
✓	✓	✓	Booked	Us	This is the default Status applied to a Job when first added. All Jobs begin with this Status. In the case of a Service Job, the Item to be serviced would be placed on the relevant person's "Booked" shelf. In the case of a Sales Job, the Job is ready to be picked.			1		☐	☐	
✓	✓	✓	Burn In	Us	Service Job - The Item has been serviced and is undergoing tests, the results of which will effect the decision to return that item back into the workflow. After sufficient testing the Job would normally move onto FINISH.			1		☐	☐	
✓	✓	✓	Call	Us	The Customer needs to be contacted to make or confirm a decision about the Job. Service Job - Typically the Job needs to quoted.	5		5		☐	☐	
✓	✓	✓	CANCEL	Special	This Status is used internally by Jim2 when a Job is cancelled.			1		☐	☐	
✓	✓	✓	Checked	Us	This would be regarded as a qualified Booked. It's useful, especially when doing bulk serving of the same Item, to have a quick pass through all Jobs, and group the Jobs by the related faults. A Junior technician who would perhaps fix the Jobs he/she could and mark the others as Checked would typically do this.			1		☐	☐	
✓	✓	✓	FINISH	Invoice	The final Status of successfully completed Jobs. Service Job - The Item has been repaired and fully tested. Sales Job - The Job has been picked/built and is now completed.			8		☐	☐	
✓	✓	✓	Info	Us	A Supplier related to this Item needs to be contacted or further technical information is required to assist the technician repairing this Item.			1		☐	☐	

Process start/stop triggers

- Define STATUS (words) to describe the start/stop triggers in your workflow, using your common terminology.
- The Status Table you build includes a brief description of the actions required (e.g. if Status = Call, then call the customer to get a decision from them). The Status Table becomes a valuable reference or training guide for your staff.
- Status can also be set to a Strict Workflow. Users can only move from status A to status B, not straight to status C.
- Because Jim2 can use 'programmable event scripting', triggers such as Status change can be used to send a report to a client, to print a report, and so on. These event scripts are developed outside the core program, but triggered by a defined event to perform a task.
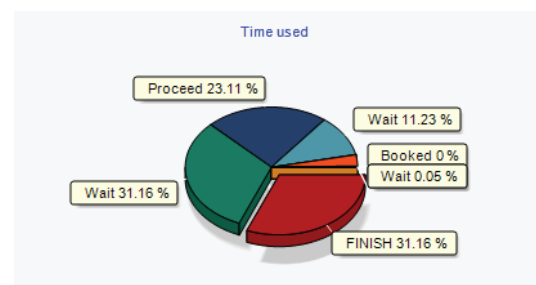
Actual vs. Billable Labour Tracking

- Because you can define your own labour types (travel, onsite, research, workshop) the Job Labour Grid builds statistics on what's really involved in a given task, to help you set selling prices more realistically.
- See a running day and week-to-date total of actual labour in the Jim2 status bar
- Use management reports to give you actual labour recorded for any given period, for any staff member/s.
- Set a realistic, generalised 'cost' on each different labour type you sell and use profit reporting to give you a true performance picture – without affecting the GL.
- Actual labour recorded does not automatically enter the (Stock)

Job Profit

Job#	26958	Cust#:	HAPP	Tax Paid:	☑
Date In:	14/04/2005	Inv No:	114084	Job Type:	Service
Date Out:	14/04/2005	Name:	John Watkins	Status:	FINISH

Stock Profit

Stock Code	Description	Unit	Value Sold	Cost	Profit
Stock					
A200721400	Targus Lappac 5 Laptop Bag	UNIT	71.8182	48.05	$23.77
A200769000	Warranty Toshiba TFT 3 Year	UNIT	271.8182	224.00	$47.82
A200777400	Toshiba Tecra A2 P-M 1.5Ghz Notebook Win XP Pro	UNIT	2250.0000	2025.00	$225.00
A505058510	Mouse MS Basic Optical OEM	UNIT	18.1818	13.7545	$4.43
C920808300	Norton Internet Security 2005	UNIT	135.4545	98.78	$36.67
K1131408000	Stapler Rapid StandUp Cobra Blue	UNIT	12.6818	8.78	$3.90
K1142640000	Staples Rapid 26/6 Box 5000	UNIT	2.4091	1.52	$0.89
			$2,762.36	$2,419.88	$342.48

Actual Labour Hours

Labour type	Hours
Research	0.6667
Sales	0.5
Workshop	2.5
	3.67 (3:40)

Time Analysis By Status
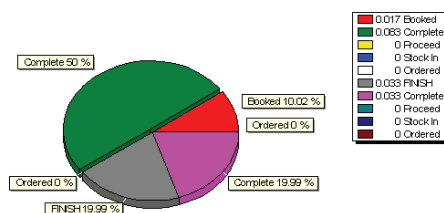
billing grid – it's your choice to add labour charges (or not!) to the Stock Grid for invoicing.

Service Contracts

Define the types of service contracts that suit your offerings:
- **Pre-paid blocks** of time/labour for ad hoc servicing.
- **Pre-paid maintenance contracts** for periodic onsite services.
- **Specific product maintenance** such as photocopier page count billing and servicing cycles.
- **Sub-contractor facilitators** – issuing service jobs to external contractors, and linking their charges directly to service jobs.

- **Service agency management** – including multiple jobs per invoice billing.

Productivity Reporting

- Use Jim2 Lists to give you a broad view of all work in progress, or use filters to narrow your view (for example, list only in-house service jobs in progress).
- Sort your Job List by Due Date or Status Due Date to check performance (overdue Jobs will be listed in red) and drill down to check who has done what and why.
- Identify process bottlenecks or improvements using real data – rather than gut feelings.
- The Jim2 'Follow Me' desktop feature means your staff can log in and work from any workstation in your network with their own desktop views and security intact. Automatic Jim2 log off (after x minutes of inactivity) can be set at a workstation level.
- Job List reports can include summarised details of work in progress (including fault and fix). This creates an invaluable reference guide for new technical staff looking to solve a problem that may have been previously solved. Drill down to actual Job details (including service notes).

See also: Workflow Fact Sheet
Stock Control Fact Sheet
Jim2 Mobile and Happen Cloud Fact Sheet

All our products are designed and developed in Australia.
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