



Small Works Module

Plan it

Schedule it

Service it

Bill it

Overview

An integrated company wide management system – from call to cash.

Who is it for?

The Summit Small Works Module has been developed for organisations involved in high volume often-low value jobs such as:

- Small Works Maintenance
- Building Services
- Facilities Management

What does the solution cover?

The Summit Small Works Module covers the whole service process from:

- call management,
- control and scheduling of jobs,
- final job invoicing,
- profitability analysis on jobs**
- managing schedule of rates

The solution can be deployed in a flexible manner either fully integrated with **RedSky IT Financial Software**, or stand alone as required.

Which types of work are managed?

- Reactive Maintenance
- Day works
- Schedule of rates based work

** Where RedSky IT Financial Software is used

"The RedSky IT solution helps us to despatch invoices earlier, which has a dramatic effect on improving cashflow, facilitates customers' requirements for 'open book' accounting and we can now use the job history to tender more competitively for future work."

Roy Hunter, Finance Director, Withey Group

The Summit Small Works Module tracks the job from order through to completion and final invoicing. It is a seamlessly integrated solution to ensure data is not re-keyed at any stage and thus accuracy and control are maintained.

The Summit Small Works Module makes efficient use of technology to avoid high volumes of paperwork when managing jobs in what is traditionally a very labour intensive process. The solution automates the whole service process and offers a much clearer view of the business even when spread across several locations or regions.

Features include:

- Ability to control the priority of jobs to ensure target response times are achieved to meet any client imposed KPIs and Service Level Agreements.
- Improves client satisfaction by offering reports and documentation (such as invoices) in a format that suits them.
- Includes an option to offer clients access to the solution via a secure extranet link in order to review status of jobs.
- Invoice management – all integrated and automatically generated when jobs are completed – to ensure improved cash flow.
- Ability to view operatives' current workload.
- Easy to use Windows environment which integrates with common desktop applications such as Microsoft Office.
- Option for an entry level solution with pre-defined workflow.

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The Summit Small Works Module Offers:

- Multi-user solution
- Client/Server or stand alone
- Options to use in a web browser
- Call centre front end
- Integrated quotes/estimating
- Field based mobile solution
- Integration with a choice of RedSky IT financial software

Return on Investment

- More efficient processing
- Timely submission of invoices
- Quicker cash collection
- Proactive management against Service Level Agreements
- Avoidance of penalties
- Improved resource utilisation



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Core Product

At the heart of the product is a workflow linked to rules that allow you to track the current position of each job

1. Workflow

The Summit Small Works Module comes with a workflow incorporating the main stages of a small works job and its pinch points.

- Log Call
- Amend Call
- Allocate Operatives
- Print Job Ticket
- Awaiting Parts\SC
- Variation Order Required
- Access Denied
- Works Complete
- Add/Verify Measure Details

The screenshot shows a software window titled "Job Ticket Header" with a blue title bar and standard window controls. It has three tabs: "Basic Details", "Extra Details", and "Screen 3". The "Basic Details" tab is active, displaying a form with the following fields:

| | | |
|-------------|------------------|---------------------------|
| Job Number: | NH0000003 | The Resident |
| Customer: | N003 | North Herts Housing Trust |
| Order No.: | 1on6879g88v | |
| Status: | AWF | AWAITING PARTS |
| Site Name: | The Resident | |
| Address: | 72 BRIGHTON ROAD | |
| | NEWHAVEN | |
| | EAST SUSSEX | |
| Postcode: | BN9 9NS | |
| Contact: | JULIE BASSETT | Phone: 01273 611108 |
| Comments: | | |
| Report To: | | |

At the bottom of the window are "Ok" and "Cancel" buttons.

The screen shows the logged job details, including the current status of this job.

"On a day to day basis, the system allows me to get an instant picture of each job's status at the touch of a button."

**Shaun Salter, Small Works Manager,
Ellmore Construction**

Controlling rules determine what status (or range) that a ticket must be in before the system will allow the next stage to be completed.

2. Priorities

These are user definable by contract. Priorities can be on the basis of a number of hours (including when a day starts and ends) or a number of days. It will also account for working at weekends and Bank Holidays. This information is used to prompt the user on input of a work ticket with the anticipated completion date and time.

If **RedSky IT Financial Software** is being utilised, a contract is created automatically in the cost ledger.



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3. Tracking Status

The status of the ticket can be tracked using an enquiry program where the user can define tracking criteria. These criteria may show, for example, all orders for a depot that are in a waiting status (materials, inspection, access) or all orders that are within say 2 hours/days of their completion that are still outstanding. This enables a proactive approach to be taken by the management.

| Job Ticket | Site Name | Work Desc | Date Received | Date Target | Time Target | Priority | Order No. | Status |
|------------|------------------------|---------------------------------------|---------------|-------------|-------------|----------|-----------|-------------------|
| JC000003 | Evans & Co Ltd | CANNOT SWITCH UNIT ON | 18/10/04 | 20/10/04 | 21:38:48 | P2 | 0N7H775 | LEDGERS UPDATED |
| JC000004 | Evans & Co Ltd | AIR CON UNIT IS NOT CHILLING | 19/10/04 | 20/10/04 | 10:39:25 | P1 | 668 | LEDGERS UPDATED |
| JC000007 | 96 RED SQUARE | WORK | 22/10/04 | 22/10/04 | 14:25:21 | P1 | 777 | LEDGERS UPDATED |
| JC000002 | SUSSEX/BARN PUBLIC H | Repair to window | 29/10/02 | 11/11/02 | 11:41:40 | N | ABCK543 | LEDGERS UPDATED |
| LN000001 | Post Office House | ROLLER SHUTTER IN LOADING BAY | 22/11/04 | 16/04/04 | | 2 | 784JK1978 | CONFIRMED COMPL |
| LN000002 | Post Office House | Attend to leaking tap in kitchen | 22/11/04 | 18/05/05 | | 4 | Y1 | INVOICED |
| LN000003 | Vehicle Depot South | LOOSE KERBING O/S ENTRANCE | 23/11/04 | 13/01/04 | | 4 | 686 | QUOTE REQUIRED |
| LN000004 | Regional Call Centre | WORK | 23/11/04 | 23/11/04 | 14:21:25 | 4 | 797 | QUOTE REQUIRED |
| LN000005 | Central Sorting Office | Entrance door is sticking | 23/11/04 | 23/11/04 | 14:09:59 | 2 | 567958768 | INVOICED |
| LN000006 | Regional Call Centre | Leaking overflow pipe in kitchen wall | 23/11/04 | 23/11/04 | 14:13:17 | 2 | 0N795567 | INVOICED |
| LN000007 | Vehicle Depot South | Outside light non-lamp | 23/11/04 | 00/07/09 | | 4 | 7367 | JOB COMPLETED (N) |
| LN000008 | Regional Call Centre | Carport works as per Order | 23/11/04 | 23/12/04 | 20:48:31 | 4 | 6977895 | JOB COMPLETED (N) |
| LN000009 | Regional Call Centre | maintenance | 23/11/04 | 23/11/04 | 21:01:28 | 4 | 6888 | ORDER LOGGED |
| LN000010 | Regional Call Centre | Lock needs replacing on side entrance | 23/11/04 | 17/03/11 | | 4 | JK6868795 | ORDER LOGGED |
| LN000011 | Regional Call Centre | Drains are blocked in carpark | 23/11/04 | 24/01/05 | 21:08:24 | 4 | 657N1490 | CONFIRMED COMPL |

The tracking screen shows at a glance the status of all current work.

The ticket can be moved through the statuses. Priorities can be automatically re-calculated based on statuses i.e. if no access add X days/hours to the completion date

4. Print a Job Ticket

The industry standard Crystal Reports tool is used to print the job ticket; this allows a great deal of flexibility in the layout of work tickets.

5. Schedule of Rates

Multiple schedules of rates can be associated with each client/contract. These can be imported electronically.

| Item ref | Description | Unit price cost | Rate |
|----------|--------------------------------|-----------------|--------|
| 11001 | WALL 225MM CHEM INJECT DPC INT | 9.120 | 9.120 |
| 1101 | LAY NEW 127x25MM PCC KERB | 20.950 | 20.950 |
| 1103 | RENEW 127x25MM PCC KERB | 14.200 | 14.200 |
| 1105 | REBED ANY TYPE OF PCC KERB | 8.330 | 8.330 |
| 1301 | RENEW NE 250x125MM | 17.090 | 17.090 |
| 1303 | REBED NE 250x125MM | 9.390 | 9.390 |
| 1501 | LAY 50x152MM PCC EDGING | 13.260 | 13.260 |
| 1503 | RENEW 50x152MM PCC EDGING | 9.490 | 9.490 |
| 1505 | REBED - STRIGHT/CURVED | 6.390 | 6.390 |
| 1507 | RENEW 25x150MM TIMBER | 4.740 | 4.740 |
| 3001 | EXC H CORE 75MM CONC BED | 18.820 | 18.820 |
| 3003 | EXC H CORE 100MM CONC BED | 23.360 | 23.360 |
| 3005 | RENEW WITH CONCRETE 75MM | 21.820 | 21.820 |
| 3007 | RENEW WITH CONCRETE 100MM | 27.310 | 27.310 |
| 3009 | EXTRA NON SLP FINISH | 1.680 | 1.680 |

Schedule Items can be picked from the list at any time during the workflow process of a job.

"We use the system to track works through to completion and when each job is completed the software is used to invoice our clients. It also helps manage and schedule the proactive work such as garden and road maintenance. We can now review the whole Annington contract and ensure that we continue to meet the service level agreements in place."

Neil Oakey, Project Manager, MITIE Scotgate



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6. Enquiry

Work tickets can be enquired on using multiple search criteria including:

- Work Ticket number,
- Contract, Customer,
- Customer Order,
- Site Address,
- Status.

| | | | |
|-----------------------|--|-------------------|---------------|
| Basic Details | | Extra Details | Screen 3 |
| Customer: | POST001 | POST OFFICE | CB |
| Rec'd Date: | 24-11-04 | Time: | 07:51:47 |
| Ordered By: | PS | Order No.: | ON78947586 |
| Location: | 1 | Post Office House | |
| Address: | 23-53 Green Lanes Road Bromley by Bow London | | |
| Post Code: | E1 3GB | | |
| Depot: | HO | HEAD OFFICE | |
| Contact: | Peter Smith | | |
| Report To: | Office Manager | Phone: | 0208 776 7789 |
| Site Comments: | | | |
| Priority: | 4 | 4 Hour Response | |
| Target Completion on: | 24-11-04 | at: | 11:51:47 |
| Work Required: | Attend to Leaking Tap in Kitchen | | |
| Notes: | | | |
| Schedule Item: | | | |
| Category: | M | | |
| Order Date: | 24-11-04 | Time: | 07:51:47 |

This enquiry screen shows the main details of the job including the priority

7. Completion

The ticket is marked as completed and charge details can be added, this is achieved by reference to a resource list of labour, materials and plant costs. Uplifts and discounts can be applied to these and general text comments can be added to describe work. A minimum order value can be applied if the items on the order do not reach a set value.

8. Invoicing

Once the detail of what is to be invoiced has been input, the works ticket can be marked as ready for invoicing.

Invoices can be produced per work ticket or grouped over a time period by customer or contract. Where a 'bulk' invoice is input a backing sheet is produced giving details of the individual values

Invoice layouts are definable by client or by specific contract.

Where run as part of an integrated system, the Sales Ledger and Contract Ledger are updated with the invoice information.

The Next Stage in Service Management

** For those requiring greater flexibility and enhanced functionality [Summit Service Management](#) expands on the functionality of The Summit Small Works Module.

Additional functionality includes:

- Contract specific/User definable workflow
- Planned Maintenance/Service Scheduling
- Engineers diary for greater resource visibility
- Interim invoicing/ Credit Notes
- Email notifications on status changes
- User definable databases