# Job Control System – For Service Companies

## Introduction

What is the difference between data and information? We think of information as data made useful. Information should be easily accessible, easily searchable, and provide links to all other associated information. Our system has been designed primarily to supply you, the management of a successful service company, more information.

Our system has been designed with all service industries in mind. If you operate a day-to-day service business, with operatives working out on site or even in your own workshops, our system is for you.

A computerised system is only ever useful if it simplifies processes. We have built our system with this clearly in mind. Our philosophy is a quick route to information. Imagine the following questions….

*'You did a job for us early last year, we need a similar job doing, which engineer did you send then?'*

*'I enquired about one of your services last month, can you remind me what I was quoted?'*

How long would it take you to answer these questions? Where is the information? How long will it take you to locate it? With our system, answering questions like these can take you as little as seconds.

Operating in a single or multi-user environment to suit your needs, our system **will** improve your performance, but hopefully your profitability too!

## Our System in a Nutshell

- Control of your service work from order right through to invoicing
- Simple time scaling helps you measure and improve your response and completion times
- Logging of timecards, material usage, operations, travel, and other expenses
- Modules available for compatibility with recognised and bespoke Schedules of Rates
- Automated invoicing with export routines for Sage Line50 and Line100 systems
- Detailed measure of profitability at job level
- Simple linking achieves trace-ability of all documents and records back to job
- Support from detailed customer and supplier databases
- Log enquiries and produce formal quotations
- Raise purchase orders and maintain parts and materials database
- Searches, filters and browse screens achieve instant location of information
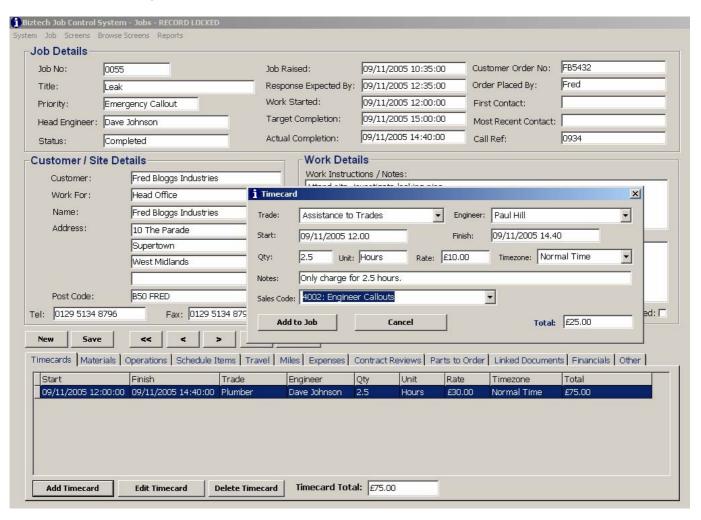
## Example of Who Uses Our System - William Gough Limited – Building Maintenance Company

*'The investment made by our company in this software has paid for itself tenfold! For many years, we have utilised IT systems where only a small proportion of the package has been used. The system supplied by Biztech has revolutionised our business with 95% of our work being procured using this system. Not only has our productivity increased, but through so many efficiencies we are delivering an extremely high level of service. This has ultimately increased our sales on one 3-year term contract alone by over 40% with the same level of overhead. We couldn't have wished for a better result!'*

*Andrew Lewis - Managing Director*

## Explaining Our System in More Detail

### Job Control

The core of the system is the Job module. A job is raised for every sales order received, be it a day-to-day callout, or a larger project. Timescales are set, engineers assigned. The job record is dynamically linked to the customer account in the customer database. As work is completed labour and travel time are logged, along with and material usage, plus indirect items such as mileage charges and on the job expenses. As such items are logged to the job, job totals are calculated showing detailed profitability analysis. Each item may also bear a nominal code, which is used when the invoice is raised and transferred to the accounting system. On final completion of the job, an invoice is raised drawing forward the charges from the job. As invoices, purchase orders, quotations and letters are sent relating to a job, automated and user placed links are added to the job to enable immediate access to information whilst the job is live, and in the future.



### Invoicing

Invoices are raised directly from the job module. A job may produce multiple invoices. When an invoice is raised, all chargeable items logged against the job (not yet invoice) are transferred to the invoice and NET and VAT totals calculated. At this point items can be edited, omitted or added if necessary. The invoice address defaults to the job address but can be simply re-linked if for example it is to sent to the head office instead of the job site. Finally the invoice is printed, and the invoice is set as 'ready to export'. At your leisure you then export a batch of completed invoices. Once this has been done, simple routine is run which logs into sage accounts, validates the export data, and if all is well, creates the invoice posts the invoice items to the designated nominal and departmental accounts. Once

invoices are exported they are no longer editable to avoid inconsistencies with your accounting system.



## Enquiries/ Quotations

As a service company, most of your work may be day-to-day callouts. However from time to time people may call 'on spec' or require a quotation for more extensive work. In these instances the enquiry / quotation module is used to log the clients requirements and if necessary produce a formal quotation document. The log of enquiries will help you keep track of potential work. When an order is placed it is possible to convert the enquiry into a job to avoid re keying of data.



## Purchase Ordering

In order to satisfy your stock and on-the-job material requirements, the system includes a purchasing module. This section enables you to raise an order to a selected supplier detailing delivery address and date and time requirements. Items are added to the order. For regularly ordered parts it is easy to select them from the materials database to avoided unnecessary typing. As prices change, the system automatically updates the materials database with new prices. Once your order is complete, a formal purchase order document is produced.

## Customer and Supplier Database

A high majority of your business will no doubt be conducted with established clients and suppliers. For this reason the system includes a detailed database of both. For each account the system allows unlimited sites, branches and contacts to be stored, which are automatically filtered for easy access. The databases support all other modules so that customers, suppliers and the corresponding site or branch can be quickly selected when raising a job, invoice, enquiry or purchase order. Needless to say the databases double up as stand alone modules for quick access to telephone, fax, email, and address details for your day-to-day business.

**i Biztech Job Control System - Customer Browse**

| Name | Customer ID | Address | Tel |
|------|-------------|---------|-----|
| Adoford Systems | ADO001 | Adoford House | 0435 34666 |
| Allied Recruitment Ltd | ALL001 | 7 High Street | 0208 12345 |
| Business Direct | BUS001 | 10 Parade Road | 0129 51347 |
| Cake Décor Ltd | CAK001 | 23 Coventry Road | 0634 34543 |
| Delta Security Ltd | DEL001 | Lighthouse Building | 0892 23434 |
| Diamond Windows | DIA001 | 45 Clear View Road | 0178 24932 |
| Direct Transport Ltd | DIR001 | 1 Cobblestone Road | 0345 76473 |
| Direct Cleaning | DIR002 | 1033 High Road South | 0343 23345 |
| Diskon Ltd | DIS001 | 64 Arrow Road | 0663 43543 |
| Doors 2 U | DOO001 | Doors 2 U House | 0673 43534 |
| Hybrid Cars Ltd | HYB002 | 45 Economy Road | 0945 43534 |
| Maztech Ltd | MAZ001 | 24 Bridgenorth Street | 0966 83983 |
| Phone World | PHO001 | 176 Meridian Road | 0845 84238 |
| Rainbow Paints Ltd | RAI001 | Colourful Avenue | 0663 23959 |
| Ultrasecure Ltd | ULT001 | Ultrasecure House | 0535 34535 |

**Customer Name:** [_____]     Find     Cancel

## Bespoke Modules

Whilst we have made every effort to produce a system that will seamlessly integrate into your operation, we realise that each business is different. Because of this, this is not a 'buy in a box' system. Should you require some bespoke elements to the system we will discuss with you your requirements and reach a solution together. Whilst many service companies operate on a time and materials basis, others choose to work from a schedule of rates such as NSR or even their own schedule. We have experience of incorporating both into our system.

## Where to go from here.

If you think our system may work well in your organisation, we will be happy to arrange a free demonstration. This can be performed at our offices, or we will be happy to visit you at your premises.

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