



# Service Management



## Feature Highlights

- Service/support contracts
- Supported equipment lists
- Ticketing
- Time tracking
- Ticket auto emails



## Available in

- Service & Support Package
- Solution Provider Package



03303 800 601



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## Overview

OscarOnline® (Oscar) has been designed to be simple to learn and easy to use, aimed at meeting the needs of UK small businesses.

The Service Management module is ideally suited for businesses that offer service contracts to their customers and need to keep track of what service tickets are active and what actions have been taken.

## Contracts

You can create contracts with your customers and record essential information such as start date, minimum term, notice period and invoice terms. You can also define invoicing intervals and upload a signed contract document if applicable.

To make invoicing easier you can also create the line items that go on your regular invoice to the customer. If between invoices new items are added to the contract, they can be changed straight away and they will automatically be included in the next invoice.

## Serviced Equipment Lists

Whatever you service or support, you can keep a list of the supported equipment against the contract e.g. if you support computers, you can create a list of the computers supported along with serial numbers, specification etc. Oscar then allows you to view the date the equipment was last worked on and any scheduled date for a service. You can also view the history of all work carried out on the equipment.

## Tickets

Service/action tickets can be created on contracts to indicate that a problem or regular maintenance is being worked on. Engineers/support staff can then record the actions they perform, the time spent, set follow-ups and upload any supporting documents against the ticket. Tickets stay open until an action is performed and the ticket is marked as closed.



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## Contract Communication

Any discussion with your customer relating to their contract with you can be recorded against the contract if required. This could include discussing renewal or adding equipment to the contract. This makes it easy for you to see the history of who said what to who and when so that nothing gets forgotten.

## Linked Quotes, Orders & Invoices

Extras quoted and ordered, and all relevant invoices can be linked to the contract so that a full history of the work generated under the contract can be easily provided.

## Service Visor

A visor can be attached to your dashboard which allows quick updates to action tickets and the creation of new tickets without having to first navigate to the action ticket page. This is ideal for users if providing support is their primary role.

## Automated Ticket Response Emails

Action ticket policies allow customised emails to be sent to your customers when they open a new ticket and optionally when the ticket is updated. It's also possible to email your customer when their input is needed on a ticket and set the ticket to auto-close if you don't hear from them after X many days.

## Automated Ticket Communication Emails

Your contracts can be set to email your customers on a schedule you define, based around the start date of the contract and the expiry of the minimum term. This is useful, for instance, to automatically provide your customer with information relating to the contract after X days from the contract start. You can also email the customer X days before the expiry of the contract with a reminder to renew, if you choose.



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## Automated Tasks

Your contracts can be set to remind you to perform tasks on a schedule you define, based around the start date of the contract and the expiry of the minimum term. For example, you could set a reminder to phone the customer and check they are happy with the service 30 days after the start of the contract. The task would appear on your dashboard on the right day and stay there until the task is marked complete.



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