

## TESSERACT

*Tesseract is a field service management (FSM) solution that speeds up service delivery, cuts costs and delights customers by integrating, automating and optimising the different parts of your service chain.*



## **JOB MANAGEMENT & SCHEDULING**

Plan, manage and schedule jobs faster, increasing engineer productivity and customer satisfaction

---

## **PARTS MANAGEMENT**

Track and manage parts in any location to accurately record costs against jobs and boost first-time fix rates

---

# **TESSERACT – AT A GLANCE**

## **TESSERACT WILL EMPOWER YOU TO:**

- Do more work with the same or fewer people
- Have more control over your costs
- Eliminate paper in the field and back office
- Invoice more hours and more materials and make sure nothing gets missed
- Calculate contract prices correctly
- Accelerate your service-to-cash cycle
- Improve response times and service quality
- Monitor and increase profitability
- Future-proof your operation, so that you can change, develop and grow as the market does
- Help your customers deliver a better service to theirs

This guide will tell you more about the different components of Tesseract and how they can transform your field service operation from a cost maker to a profit maker.

## CONTRACT & ASSET MANAGEMENT

Increase service contract profitability and improve how engineers deal with problems

## CUSTOMER PORTAL

Reduce incoming calls and increase transparency by giving customers the ability to log calls and access key information

## WORKSHOP MANAGEMENT

Get control of internal repair workflows and maintain asset integrity more easily

## REPORTING

Create insight-rich reports in minutes instead of days

## INVOICING

Save time and boost cash flow with automated calculations and instant data

## MOBILE WORKING

Empower engineers to perform better in the field by giving them the ability to complete and sign off jobs electronically, in real time

## SALES MANAGEMENT

Bridge the gap between sales and service and make both more effective

Tesseract is an end-to-end solution that unites the different branches of your field service operation, eliminates errors and delays, and makes your entire organisation work smarter, not harder.

Its integrated modules are cloud-based, easy to use, accessible on any web browser and can be implemented in full or in increments – depending on the needs of your business.



# CONTRACT & ASSET MANAGEMENT

*Our fully integrated database of assets and contracts improves service quality, customer care and profitability.*

## **CENTRALISE YOUR DATA**

Service contracts, asset lists and all associated service information are securely stored in one place. This prevents you from having to rely on paper, spreadsheets and point solutions and risk misfiling information or losing it down the back of a filing cabinet.

## **ELIMINATE DUPLICATE DATA ENTRY**

You only have to enter customer, contract and asset data once and the information is automatically fed through to the rest of the service chain.

## **FIND INFORMATION QUICKER**

With all your data in one place, anything you or your customers need to know about an asset, site or service contract is quickly and easily surfaced.

## **PREVENT REOCCURRING PROBLEMS**

Engineers have access to the full service history of an asset, including installs, breakdowns, repairs, replacements and planned maintenances. This improves their ability to identify and prevent reoccurring problems by recommending long-term solutions rather than short-term fixes.

## **ALWAYS KNOW WHAT TO INVOICE**

Full visibility of what is and isn't included in a service contract ensures all work is properly charged for.

## **NEVER MISS A RENEWAL DATE**

When a service contract is due to expire, an automated alert enables you to start the renewal process in plenty of time and avoid losing out on a year's worth of revenue.

## **GENERATE NEW CONTRACTS EASILY**

The system automatically generates ready-made service contracts using data collected by the sales team, saving you from having to input the data manually into a template.

## **IMPROVE PROFITABILITY**

Full visibility of which contracts, customers and machines are profitable and which are not enables you to make strategic decisions about your pricing.



# JOB MANAGEMENT & SCHEDULING

*Our powerful job management and scheduling system saves time and hassle and improves customer satisfaction*

## **IMPROVE RESPONSE TIMES**

Reactive calls are logged and queued according to contractual obligations and the urgency of the job. Automated alerts notify dispatchers if a response time is going to be missed so they can take action. Dispatchers and engineers can monitor and update job status in real time to ensure that response times are met. This helps comply with service-level agreements (SLAs), minimise machine downtime for customers and enhance your customer relationships.

## **ALLOCATE RESOURCES IN PLENTY OF TIME**

Dispatchers use the live diary to schedule planned maintenance visits in advance. This allows plenty of time to assign engineers, allocate resources and agree the visits with customers.

## **SCHEDULE ENGINEERS QUICKLY AND INTELLIGENTLY**

Instead of looking at spreadsheets, whiteboards and paper-based diaries, dispatchers receive an automated list of recommended engineers based on skill set, location and availability, along with automated alerts if there are clashes. This cuts scheduling time in half and saves dispatchers a mountain of confusion as they try to work out what, who, when and where.

## **ALWAYS KNOW WHAT'S GOING ON**

Everybody in your organisation has full visibility of call statuses at all times. This allows you to keep customers informed on when an engineer is due to arrive, if a part is needed, when they can expect to receive an invoice, and whether additional work is required. Your team can see if a customer's account is on hold or if an outstanding quote for additional works needs agreeing. They can also tell if something's a repeat call or a warranty call, which may require different actions and billing processes.

## **TRACK CALLS EASIER**

A wide choice of diary view parameters allows you to customise the system to your company's requirements, making it easier to manage and track calls.

## **AVOID UNNECESSARY ADMIN AND DATA ENTRY**

Seamless integration with our contract & asset management module automatically retrieves machine data such as the serial number, contract entitlement, location and service history as soon as a call is logged. This reduces admin and saves dispatchers having to enter the data again.

# INVOICING

*Our intelligent invoicing solution empowers 1-click billing, speeding the transformation of service into cash*

## **AVOID RELYING ON PAPER**

Finance teams no longer have to wait for stained and hard-to-read worksheets to come into the office by post. When an engineer completes a job, the data is automatically fed through to the back office, cutting out delays of several days – if not longer.

## **ERADICATE UNNECESSARY DATA ENTRY**

Seamless integration with our parts, contracts and job management modules enables invoices to be automatically pre-loaded with data, saving finance teams from having to manually enter it.

## **MISS NOTHING**

Automated extraction of data from other parts of the service chain means that every opportunity for revenue is captured and nothing gets missed.

## **ELIMINATE HUMAN ERROR**

Service contract costings, ad hoc job costings and costings based on actual or estimated meter readings are automatically calculated and inputted, eliminating human error from the process.

*/ The good thing about Tesseract is their enthusiasm for customisation. /*

Jack Fleet, Severn Trent Services

## **GET PAID FASTER**

Accurate and complete invoices are achievable in 1 click. This empowers finance teams to make and send an invoice in minutes rather than days, accelerating your service-to-cash cycle and positively impacting your cash flow.

## **INTERFACE WITH YOUR OWN FINANCE SYSTEM**

Asolvi is a certified Sage Partner and Tesseract will interface directly with Sage accounting products. It can also be integrated with an array of other 3rd party accounting and finance systems. The interface allows job, customer and parts information to be exported seamlessly from Tesseract so you can preserve your existing processes.





# PARTS MANAGEMENT

*Our advanced multi-location stock control system improves the effectiveness of field engineers and warehouse operators*

## **BOOST FIRST-TIME FIX RATES**

Unlimited stock locations, ultra-efficient parts tracking and full integration with the rest of your service chain empowers warehouse operators to get the right parts to the right engineer at the right time. This increases the likelihood of a first-time fix, saving on return visit costs and reducing downtime for customers.

## **REQUEST PARTS QUICKER**

In a few clicks an engineer can request a part remotely without the need for phone calls and/or emails to the warehouse.

## **PROCESS SALES AND PURCHASE ORDERS FAST, WITH LESS ADMIN**

A directory of preferred suppliers, standard prices for each part number and the sorting of parts into part kits, parts by product and alternative parts significantly reduces admin. It makes the process of buying and selling parts quicker and easier for warehouse operators.

## **AUDIT STOCK MORE EFFECTIVELY**

Many stock control programs have only one stock location, creating a time lag whenever a part is used or moved. This makes it difficult to audit stock with any real accuracy. The capacity for unlimited stock

locations with Tesseract enables you to monitor your stock wherever it may be – warehouses, vans, customer sites, even different bin locations within a warehouse. This eliminates time-consuming logistical problems when it comes to stocktaking.

## **INCREASE PROFITABILITY**

Complete stock traceability across multiple locations and integration with our invoicing module means that all parts are properly charged for, nothing gets missed and no parts go astray.

## **KEEP CUSTOMERS INFORMED**

Real-time visibility of parts allows engineers and back office teams to keep customers informed on when parts are due to arrive and when work is likely to be completed.

## **INCREASE STOCK TURNOVER AND CASH FLOW**

Overstocking and obsolescence are reduced by automated vehicle stock valuations, full visibility of broken and slow-moving stock, and the capacity to rotate stock quickly. Van stock can be organised more effectively, increasing stock turnover and cash flow and maximising engineer productivity.



# SALES MANAGEMENT

*Our sophisticated sales tools put your sales and service teams on the same page*

## **MAKE YOUR SALES PROCESSES MORE EFFICIENT**

Streamline communication and cooperation among your sales team by logging all sales actions in one place. All salespeople have full access to the history of a sales enquiry or status of a quote and are able to take appropriate next steps without phoning or emailing colleagues for updates. This ensures that the process stays in motion and no time is wasted.

## **HARMONISE YOUR SALES AND SERVICE ACTIVITIES**

When selling new equipment and service offerings to existing customers, sales teams need to know how much money those customers are already spending, and on what. Our sales management module gives salespeople instant access to equipment histories, service entitlements, purchased parts and service contract costs and profits without having to speak to the service team or pull the data from elsewhere. Complete visibility of all sales and service activities in the same system allows salespeople to be fully informed when pursuing a lead.

## **MANAGE QUOTES MORE EASILY**

Creating and agreeing quotes for parts, service contracts and ad hoc works is a simpler, faster and more transparent process. The sales team has instant access to existing contracts, old quotes, price books and other sales activity data to help them generate a new quote. Quotes are quickly and easily inputted using simple prompts and can be tracked and evaluated at all stages between creation and

acceptance/rejection. Salespeople can use actions, notes and to-do lists to help coordinate their sales activities.

## **GENERATE NEW CONTRACTS IN 1 CLICK**

Once a quote is accepted, our quoting tool will automatically convert the data into a ready-made service contract. This eliminates the time-consuming task of manually generating and formatting new contracts.

## **KICK-START YOUR SERVICE CHAIN**

When quotes for ad hoc jobs and new parts are accepted, the data is automatically fed through to our job and parts management modules. This kick-starts the service chain, allowing service visits to be scheduled, engineers to be assigned and parts to be shipped immediately.

## **STRENGTHEN CUSTOMER RELATIONSHIPS**

If a quote is rejected, the salesperson is prompted to give a reason. This information can be used by the sales team to manage customer expectations and strengthen relationships by pitching quotes at the right level.

## **AVOID THE NEED FOR A SEPARATE CRM SYSTEM**

The ability to monitor all sales and service activities in the same system allows organisations to manage their customer relationships without the need for separate CRM software.





# MOBILE WORKING

*Our easy-to-use mobile solution empowers frontline field workers to complete more jobs in less time*

## **STREAMLINE ENGINEER WORKFLOWS**

Engineers can do everything they need to do electronically, from checking parts availability to writing service reports. When they log in, all the information they need is at their fingertips: job specs, site details, service histories, stock information, even the location of other engineers should they need help. This saves them from having to source the information via phone calls and emails to various different places. Engineers can dedicate time saved on admin and information-gathering to billable work, increasing the number of jobs they get done in a day.

## **ELIMINATE PAPERWORK**

Engineers are no longer required to fill in handwritten worksheets and post them to the office. Instead they can add, complete and send real-time service reports using their mobile devices, eliminating paper-based delays and postage costs. Photos and external documents can be added to reports to help the back office understand what work has been done. This can also act as proof of work and/or misuse in the event of a dispute. Field-based e-signature capture prevents engineers and/or back office staff from having to scan signed reports and email them to customers.

## **IMPROVE PROBLEM MANAGEMENT**

Engineers can view the full call history of an asset through our mobile solution. This enables them to identify reoccurring problems and recommend solutions that might be more appropriate than a simple fix.

## **CAPTURE TIMINGS EXACTLY**

When an engineer accepts a job, a travel time clock runs until the engineer arrives on site. When he does, a work time clock runs until the job is completed. This enables you to capture work and travel times exactly, improving accuracy for invoicing and reducing the likelihood of a dispute with the customer. Engineers can also add timesheets for non-work activities if they need to evidence their time to the office.

## **CONTINUE WORKING OFFLINE**

Engineers can continue working even if they lose internet connection; the system will automatically update with their data as soon as they come back online.

## **GUARANTEE COMPLIANCE**

The solution includes a service checklist to help engineers ensure that certain things that have to happen, do happen. This aids compliance. It also has a facility for their answers to be inputted automatically into a compliance certificate.



# CUSTOMER PORTAL

*Our simple self-service web portal reduces calls and increases transparency for customers*

## **REDUCE INCOMING CALLS**

Your customers can report faults and breakdowns and monitor outstanding jobs directly through their own web portal. This saves them phoning your office for updates and allows you to concentrate on delivering excellent service instead of handling phone calls.

## **SAVE TIME FOR YOUR CUSTOMERS**

Reducing the need for phone calls doesn't just benefit your back office teams. It benefits your customers too. It saves them being put on hold while busy operators endeavour to find answers to their questions.

## **GIVE YOUR CUSTOMERS MORE VISIBILITY**

Customers have full visibility of job escalation in real time. They can see updates logged by the engineer as regards arrival times, job status, parts required and the need for a return visit. They can also run live reports based on data you give them and get a detailed insight into the service they receive. This aids and strengthens understanding, communication and transparency between you.

## **GIVE YOUR CUSTOMERS MORE FLEXIBILITY**

Enable your customers to add new site locations and move assets between sites, thereby maintaining control of their assets' integrity.

## **WIN MORE CONTRACTS**

More and more customers are expecting to have a web portal through which they have full visibility of the service you are providing them. Offering a customer portal is becoming a prerequisite of winning service contracts.

*/ Tesseract has given us a new USP. When we approach sales prospects, we proclaim the virtues of the Tesseract system, and how much it will make their lives easier and service better. /*

Dan Sewell, Espresso Service



# WORKSHOP MANAGEMENT

*Our purpose-built workshop tool expedites internal repair processes and ensures that they are in step with the rest of the system*

## **BOOK IN NEW REPAIR JOBS QUICKLY AND EFFICIENTLY**

An easy-to-use wizard enables you to enter new repair jobs individually or in batches, with the system automatically checking details such as warranty and contract status. You can also use our workshop tool in conjunction with our job management and scheduling module, i.e. log the job as a service call and move it to the workshop.

## **MAINTAIN ASSET INTEGRITY MORE EASILY**

Full visibility of everything that happens during the repair cycle gives you more control over the integrity of your customers' assets. When an item is sent for repair, its movements and status are fully tracked and monitored so that you always know what it is, where it is and whether it has been changed, upgraded or discarded. Assets and parts can move seamlessly between the field and the workshop.

## **CUT OUT MANUAL PROCESSES**

In many systems, repairs are managed using the job management and scheduling module. But these are not designed to do repairs, so changes, upgrades and advance replacements have to be entered manually. Our workshop management module enables you to

create customised repair workflows that automatically update the system with this data, eliminating manual processes and duplicate data entry.

## **SHIP REPAIRED ASSETS MORE FLEXIBLY**

Once a job is complete, assets can be shipped individually or in batches. Most systems require that each asset is processed separately. Tesseract's ability to batch-ship saves time and hassle for customers by allowing them to receive all their items back simultaneously and reintegrate and/or redistribute them in one go.

## **MAXIMISE REVENUE**

All parts and labour costs at all stages of the repair process are captured and fed through automatically to our invoicing module, so that everything is properly charged for.





## REPORTING

*Our powerful reporting capabilities offer huge efficiency gains and the ability to make better decisions*

### **REDUCE REPORTING TIME FROM DAYS TO SECONDS**

For many businesses, reporting is a laborious manual process and compiling the necessary data takes days. With Tesseract you can extract, sort and display data about jobs, assets and parts used at the touch of a button.

### **IMPROVE THE QUALITY AND QUANTITY OF INFORMATION**

The availability of 200+ reports through Tesseract enables users and end-customers to become data-rich. This wealth of data is arranged and displayed in a clear, sensible and digestible format so that you and your customers can tackle problems and identify positive trends. This, in turn, empowers managers to make better decisions.

*/ With Tesseract, there's far less admin and data entry and we've managed to reduce the number of staff doing admin from seven to four. /*

Tracey Hughes, Planned Lighting Maintenance

### **PLAN AND CONTROL OPERATIONS MORE EFFICIENTLY**

Reports on products, contracts, sites, costs per asset, repeat calls, first-time fix rates, parts used etc. provide detailed insights into which machines are the most problematic, which customers are the most profitable, which engineers are performing most effectively, and more. These insights make you better equipped to plan and control operations and manage resources allocated to them.

### **AUTOMATE YOUR INTERNAL AND EXTERNAL COMMUNICATIONS**

Reports are submitted automatically to internal and external stakeholders. This means managers, partners and customers get the information they need on a regular basis with zero effort. Customers can also run live reports in the self-service web portal.

### **CREATE YOUR OWN REPORTS**

Data can be exported into XML, CSV, Microsoft Word, Microsoft Excel, PDFs etc where it is automatically sorted and displayed in the correct format. This enables you to produce customised reports without external help.





## PICK A SOLUTION THAT WORKS FOR YOU

*Tesseract is suitable for any organisation, big or small, that manages and maintains assets in the field. We offer two versions, both of which unite your people and processes into one smart, synchronised system.*

### **TESSERACT ENTERPRISE**

Tesseract Enterprise is ideal for organisations that need to meet fast-changing customer needs and priorities and have the flexibility to adjust to a new strategy for work and growth.

Get the full variety and depth of functionality we offer, along with flexible and customisable features that allow us to tailor the system to your exact requirements.

Qualified business and technical consultants with many years' experience in FSM will support you through every step of the implementation process – and continue to support you long after.

*/ Thanks to the Tesseract system and Asolvi's support, we have more control over our service operation than we've ever had. /*

Joanna Hawkins, Surefire

### **TESSERACT FASTTRACK**

Not all organisations require the breadth of features that come with Tesseract Enterprise. Some just want a basic, cost-effective, scalable solution that increases efficiency, accuracy, communication and speed of working.

Tesseract Fasttrack is exactly that: a pre-configured solution that includes Tesseract's core functionality and is based on what customers need most from an FSM system.

It's ideal for organisations with a limited budget and is super quick to implement. You can be up and running in a matter of days because all the hard work's already done and hardly any training is required.


You can also transition seamlessly to Tesseract Enterprise if you decide you need more flexibility, with no upheaval to your business.



## ABOUT ASOLVI

Asolvi is the leading provider of service management software for small and medium-sized enterprises (SMEs) in the field service industry in Europe. With 100 years' combined experience developing solutions for a broad array of field service sectors, Asolvi is the supplier of choice for companies seeking greater flexibility, scalability and profitability.

Tesseract is Asolvi's longest-running service management solution, launched in 1985 to make field service businesses of all types and sizes more organised, more focused and more productive. Today it is a fully supported cloud-based application with powerful IoT capabilities and a browser-independent interface globally renowned for its user-friendliness. Its usefulness extends across a wide range of markets, from IT services to commercial lighting to fire and security.



*/ By automating and optimising our service operation, Tesseract has given us the capacity to focus on our customers, rather than managing a system that is supposed to be managing us. /*

Mike Bresnihan, Industrial Cleaning Equipment Ltd



# ASOLVI UK

Swan House, Peregrine Business Park  
Gomm Road  
High Wycombe  
HP13 7DL  
Tel: +44 (0)1494 465066