

Straightset

Date: 20th August 2021

SPECIFICATION

Straightset are looking to source a new field service management software equipped to enable the business to plan, schedule, manage and report upon jobs, engineers, customers and parts for a multi-layered, national service company.

TECHNICAL REQUIREMENTS

We require the following software and services:

CRM System – managing customer communications

Asset Management- Hold asset list for customer and service history

PPM- Maintain and action a planned preventative maintenance plan for our customers

Call management – Handle breakdown and remedial action calls for customers

Field Service – Manage 50 remote engineers, paperless timesheets, job sheets and certificates

Warehouse management – picking and holding stock incl valuation

P2P – End to end purchase order to payment solution

Quotations – Send quotations to customers and manage quote acceptance / conversion process

Traceability – traceability of parts used to specific assets

Invoicing – Individual visit invoicing and Annual Contract invoicing (advance and arrears)

Reporting- Full form control, dashboards, scheduled reporting and automated distribution

Integration - integration to Sage200 and various csv/xml exports to dependant systems

The quote should include the cost of implementation + first year licence costs for 50 remote engineers and 15 office staff.

SELECTION:

The selection of the supplier will be based on an assessment of the following criteria:

- Ability to meet the exacting requirements of our business processes
- Price
- How you meet the specification
- Proven track record and experience
- Ongoing support

HOW TO APPLY:

Please submit your written quote by email to Richard Bates of Straightset at richard.bates@straightset.co.uk by 5pm on 30th August 2021.

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