

Perfect Service

A comprehensive software program for businesses in the Air Conditioning and Refrigeration industry



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Perfect Service

Overview

Perfect Service is a comprehensive affordable package aimed at those companies in the Refrigeration and Air Conditioning industries.

The package provides a complete record of customers and their equipment, Service Contracts, and Service Calls together with a parts database and stock control, invoicing and parts ordering.

There is a comprehensive reporting facility including job profitability, labour earning, various diary reports, invoices raised and service contracts due for issue or renewal.

The software package was originally developed in 2003 and has been systematically updated, extended and enhanced regularly since.

The main features of the program are accessed by one touch hotkeys which are supplemented by a number of sub-screens accessed for drop down menus.



Please note that the data shown on the screen illustrations in this brochure is for indication of the screen layout purposes only and no inference may be drawn from the accuracy or completeness of the data shown on those screens.

Perfect Service

Ginger Cat Software

Ginger Cat Software produce a range of low cost products aimed at various industry sectors, making quality software products accessible to the smaller business. We believe our products to be comprehensive, innovative and above all, easy to use.

The business has been established for seventeen years and we are delighted that some of our first clients are still with us. Over the years our product range has become quite diverse and we are constantly looking to develop new products. The industries that we have developed software for include the motor trade, vehicle hire, plant & tool hire, refrigeration engineers, care homes, care agencies, insurance brokers and retail outlets.

Of paramount importance to us is our client relationships. Some of our clients have been with us since we started and we like to maintain an ongoing business relationship with all clients. Our relationship with our clients begins - not ends - when they purchase our software.

We thrive on feedback from our clients and any reasonable suggestion or request from clients that we feel will improve our software we will endeavour to incorporate in a future update to the program.

Unless otherwise stated we provide FREE telephone support for three months after purchase and thereafter on a support contract basis. Program upgrades to subscribers to our support contract are free as are any upgrades issued within 3 months of purchase.

Our business is based around a small, but committed team in Shropshire. We have clients all over the country, from Aberdeen to Devon and we pride ourselves on the quality of service and support we give to our clients.

We listen to our clients and this helps us in our future software development. We love feedback from our clients and have a constant 'wish list' of ideas that appear in future upgrades to our software products. No version of any of our software products is more than six months old.

Perfect Service

MAIN FEATURES

- 1) Customer Database with Equipment Register and Search facility
- 2) Installation Enquiry feature, allowing tracing of original customer enquiries through to installation.
- 3) Service Call recording with engineers job sheets, parts and labour allocation and invoicing.
- 4) Quote generation and issue for installations & equipment, service calls and support contracts.
- 5) Invoice generation for service calls, installations, service contracts and ad hoc invoice and credit note generation.
- 6) Direct link to Sage accounting systems for invoices and customer details
- 7) Full parts database, stock control and ordering facility.
- 8) Service Contract generation including reminder system for overdue service contracts.
- 9) Register of equipment on hire and hire invoicing facility.
- 10) Comprehensive management reporting system
- 11) Various user defined tables - locations, descriptions etc
- 12) Online support and assistance is available via a direct internet link on a one-to-one basis.

Prices

Perfect F-Gas Software Package **£895** Including 3 months online support and updates

Annual Online Support and Updates (after initial 3 month period) **£150** p.a.

All prices are subject to VAT

The software comes supplied on a CD together with a comprehensive manual.

Support and program updates are usually done online using a direct computer link via the internet.

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4

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Customer Details

Perfect Service contains a full customer database together with a register of all their equipment, service calls and service contracts.

Customer & Equipment Details Barratt Knight & Co

Search | Details | Equipment | Service History | Service Contracts

Ref	BASSE1	Date First Business	07/12/2006
Name	Barratt Knight & Co	No of Times Customer	5
Address	67 Threlfold Road	Date Last Business	15/09/2008
	Colchester	Turnover	5289.66
	Essex	Gross Profit on Parts	
		Gross Profit %	
Postcode	CM7 8YT		
Telephone	01252 365114		
Mobile			
Contact	James Barratt		
Email Address	james.barrett@barrattknight.co.uk		
Fax	01252 360114		
Travelling Charge	A		
Account Status	Active		

Close

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Equipment Register

Attached to the customer database is a full record of their relevant equipment in summary and detail.....

Customer & Equipment Details Barratt Knight & Co

Search | Details | Equipment | Service History | Service Contracts

Equipment Summary

ID	Make	Model	Description	Location	Installed
78665	Knorris	JH6777	Air Conditioning Unit	Storeroom	21/05/2005
9999292	Harris	H7766	Display Unit	Shop	
650505	London	JH7776	Refrigeration Unit	Shop	

No of Items of Equipment: 4

Equipment Details

Equipment ID No: 78665

Description: Air Conditioning Unit

Make: Knorris

Model: JH6777

Location: Storeroom

Date Installed: 21/05/2005

Purchased: 10/05/2005

Installer: J.Richards

Serial No: JH84665411244HJB

Part No: GH34555

Supplier: Knorris Refrigeration

Cost: 2060.25

Next Service: 15/02/2010

Last Service: 16/08/2009

Site Address

12 Burns Road

portswood

southampton

Technical Data

Condenser SN: 34552990

Evaporator SN: 55775

Condenser Brackets: Yes

Liquid Line: 5/8

Suction Line: 1/4

Cable SWA Core:

Controller Type: HW

Drain Type & Size:

Power Supply Indoor

Rating: 16 Amp

Phase: 1 Phase

Outdoor

Rating:

Phase:

Evaporator

Air on Temperature: 90

Air Off Temperature:

Gas Type:

Additional Gas Charge:

Cond Unit run amps: 7675

Single Phase Amps:

Phase 1:

Phase 2:

Phase 3: 555

Suction Pressure psi:

Head Pressure psi:

Temperature Setting:

Fan Speed High:

Med:

Low:

Condensate Drain: Yes

Condensate Pump: Yes

Heaters Checked:

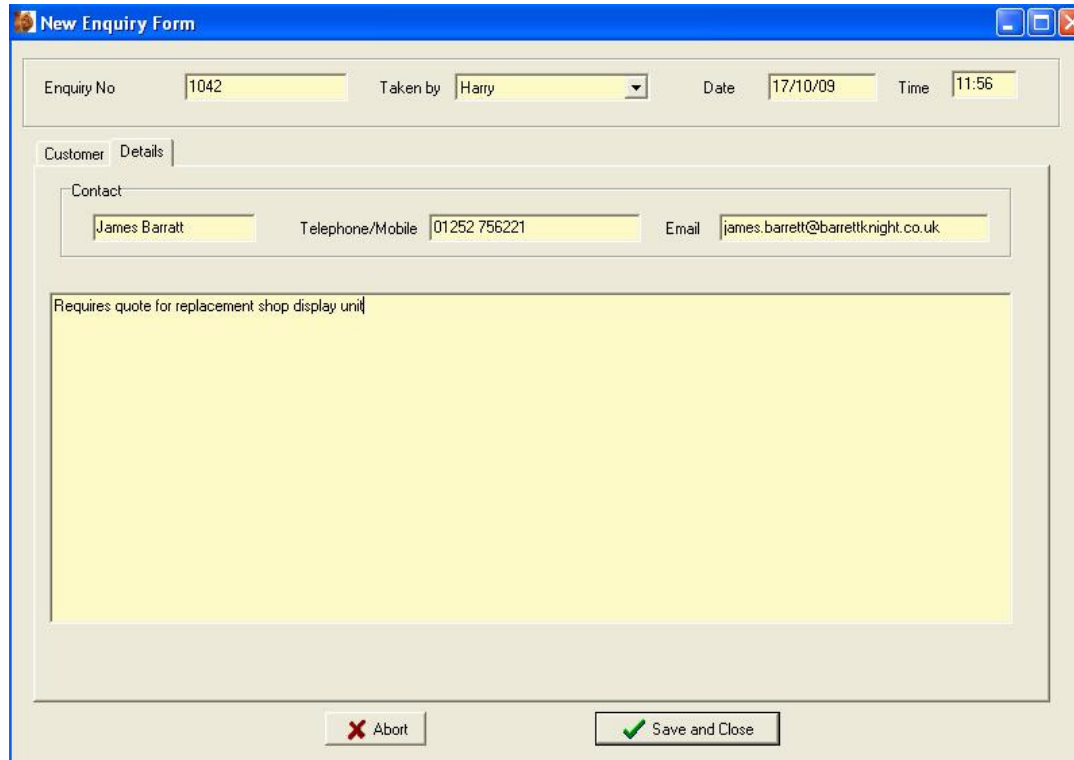
Heaters Amps:

Close

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Enquiries to Installations

Perfect Service monitors the progression of an initial enquiry for a prospective sale of equipment through to the eventual sale, installation and invoicing.



The screenshot shows a software window titled "New Enquiry Form". At the top, there are input fields for "Enquiry No" (1042), "Taken by" (Harry), "Date" (17/10/09), and "Time" (11:56). Below this is a tabbed interface with "Customer" and "Details" tabs. Under the "Details" tab, there is a "Contact" section with fields for "Name" (James Barratt), "Telephone/Mobile" (01252 756221), and "Email" (james.barrett@barrettknight.co.uk). A large text area below contains the text "Requires quote for replacement shop display unit". At the bottom of the window are two buttons: "Abort" and "Save and Close".

Outstanding enquiries may be monitored, allocated to a manager and eventually transferred to an installation, an enquiry 'on hold' file or a 'dead enquiry' file. On hold and 'dead' enquiries may be accessed, or the status changed at any time.

When an enquiry becomes an installation, it transfers to the installation screen which allows input of the precise equipment details, installation details and invoice data.

An installation/commissioning sheet may be printed from the installation screen. A sample of the commissioning sheet is shown at the back of this brochure.

The invoice may be produced directly from this screen. Upon installation the equipment details are automatically transferred to the customer database (see above).

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Service Calls

The hub of the software package is the Service Calls routine. From the first call to invoicing, the Service Calls routine handles everything in a logical and clear way.

- a) The allocation of an engineer
- b) Printing of job sheet
- c) Issue of Quote
- d) Allocation of parts
- e) Parts Ordering
- f) Allocation of labour
- g) Mileage Rate Charging
- h) Invoicing

The screenshot shows a software interface for a service call. The title bar reads "Current Service Call No 1026 for James & Boulton". The interface is divided into several sections:

- Job Details:** A grid of input fields for Job No (1026), Telephone No, Customer (James & Boulton), Mobile, Customer Ref (JAMES1), Cust Order No, Date In (17/04/2008), Ordered by, Date Promised, Contact, Price Quoted, and Allocated to (a dropdown menu).
- Call Taken:** Fields for Call Taken (08/04/2008), Time (17:33:00), and Taken by.
- Site Address:** A vertical stack of seven text input fields.
- Job Description:** A large text area containing the text "Problem with thermostat on display unit".
- Job Type:** Radio buttons for Service Contract, Warranty, Chargeable (selected), and Free of Charge. There is also an Authorise radio button.
- Job Status:** A dropdown menu currently set to "Job In".

At the bottom of the interface, there are two rows of buttons:

- Row 1: Show Completed Jobs, Pro Forma Invoice, Preview Invoice, Print Job Summary.
- Row 2: Delete Job, Print Job Sheet, Print Invoice, Save, Close, Finish Job.

Included in the screen is the ability to designate a job as a non-chargeable job (i.e. covered by service contract or warranty).

Every job is stored on the system and may be recalled with full details at any time – even after the job has been completed.

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Parts Database and Stock Control

Perfect Service has a full parts database which links to the parts allocation routine in the Service Call section. Every time a part is allocated to a job, the stock control is updated.

The screenshot displays the 'Parts Details' window with the following components:

- Table:** A table with columns 'Description', 'Category', and 'Part No'. It lists: 2" Bolt (Fittings, 1050444), Air Filter (Filters, 80905), Thermostat (Compressors, 776655), and Oil Filter (Filters, 776655).
- Search:** A 'Description Search' field with a 'Show Full List' button.
- Navigation:** A set of navigation buttons (Home, Left, Right, End, Plus, Minus, Checkmark) and a 'Save & Close' button.
- Stock & Prices Tab:** Fields for Stock (0), Allocated (0), Cost - Last Price (3.00), Average Price, Per (1), Order Quantity (10), Minimum Stock, Charge Out Price (5.00), Trade Price (5.00), Gross Profit % (40.00), Trade GP % (40.00), Sales (Q), Profit Earned, Sales (£), Last Sale, and Last Purchase.

The parts stock control is updated by the Stock Receipts routine and there is a facility to print blank stock-take forms.

A full stock list and valuation may be seen on screen or printed at any time.

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Hires

Perfect Service includes the facility set up equipment hires and to invoice those hires on a regular or ad hoc basis.

The screenshot shows a software window titled "Hire Details 10 Andrew". It has three tabs: "Hires", "Customer", and "Equipment". The "Hires" tab is active. The form contains the following fields and sections:

- Hire No:** 10
- Commenced:** 22/08/2009
- Item No:** 1
- Description of Equipment:** 2 x Dehumidifiers
- Monthly Fee:** 195.00
- VAT:** 29.25
- End Hire:** Enter date hire ends: 14/09/10
- Summary of Items:** A table with the following data:

Itemno	Mthly Chg
1	195.00
- Total Hire Charge:** 195.00

Navigation buttons (back, forward, home, end, refresh) are located below the Description of Equipment field. A "Confirm End" button is located below the End Hire date field. "Save" and "Close" buttons are at the bottom of the window.

The hire invoices are generated automatically as long as the hire continues.

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Service Contracts

An important part of Perfect Service is the generation of Service contracts, invitation letters and contract renewal invoices.

Included in the Customer Database (see above) is a section devoted to the Service Contract.

Customer & Equipment Details Barratt Knight & Co

Search | Details | Equipment | Service History | Service Contracts

Service Contract

Contract Refused or Not Renewed

Contract Type
 None Service Only Fully Comprehensive

Contract No 60561
Expiry 22/04/2006
Last Cost 460.00
No of Renewals (Years) 5

First Maint. Contract Letter Due 12/02/2006
Quote Reference 5066
Contract Invitation Sent 12/04/2006
Date Contract Accepted 22/04/2006

Equipment Summary

Item
▶ Refrigeration Unit

Close

When the initial service contract invitation becomes due, Perfect Service will select and print letters and service contracts. The wording of the letters and contracts are user defined in the Parameters section of the software (see below).

Upon acceptance of the contract Perfect Service will issue the initial invoice and diarise an automatic invoice generation for subsequent years. At any time the amount of the annual renewal invoice may be varied.

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Invoicing and Quotes

Invoicing

There are a number of invoicing facilities and options within the software package.

- Service call jobs may be invoiced individually upon the jobs completion or held 'Ready for Invoicing' and printed as an invoice run.
- Invoices for equipment hire may be printed individually or held in the invoice run.
- Invoices for equipment installations may be generated and printed direct from Perfect Service.
- Invoices for service contracts and renewals may be generated
- In addition there is a facility for ad hoc invoice and credit note production from the system. These are completely free text and are generated on an 'as needed' basis.

There is a facility to link the invoices and customer details directly into Sage Line 50 accounting systems.

Quotes

Included in Perfect Service is the ability to generate and print quotes for equipment sales and installation, service and maintenance and support contracts.

Perfect Service

Parts Orders

There are a number of ways in which Perfect Service can generate orders for parts.

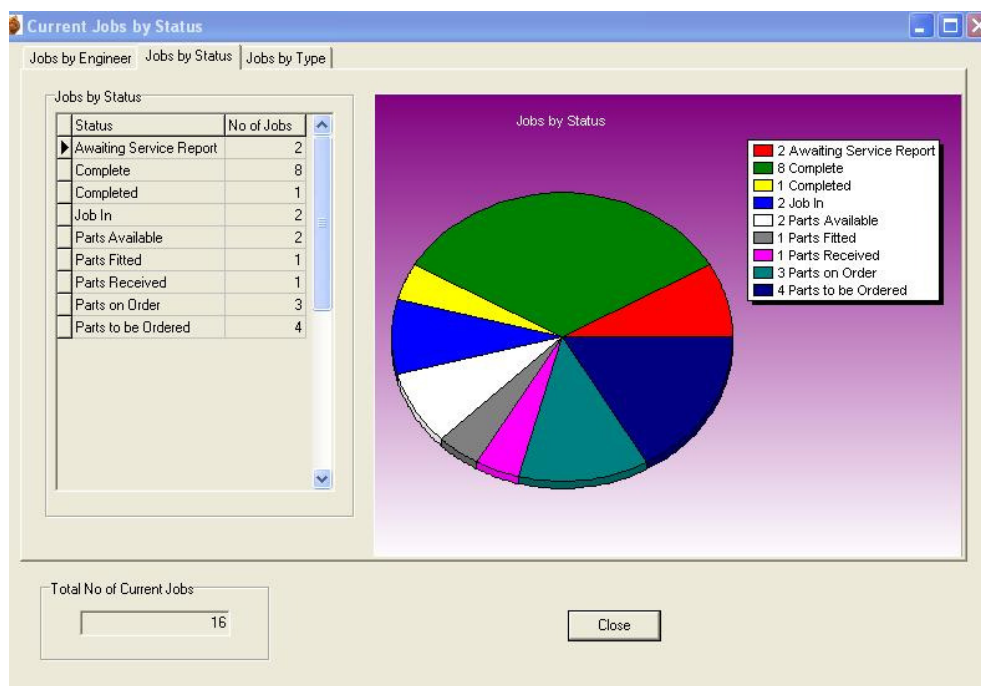
- Using the 'minimum stock' facility within the parts database, orders may be generated for parts to various designated suppliers
- Using the free text ordering facility parts may be ordered without reference to existing stock levels
- When parts are required for a specific job and are not normally held in stock, an order may be generated direct from the job.

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Reporting

One of the most powerful functions of Perfect Service is its reporting facilities. There are a number of reports covering different aspects of management information including the following:

- Day Diary of Jobs scheduled for each day
- Invoice Listing of all invoices generated within user defined dates
- Status reports of Installations including a report of Equipment awaiting delivery and future installation dates
- Various job reports including those awaiting parts and those awaiting engineers reports
- New Customers report
- Work in Progress Report
- Job profitability Report
- Stock List and Valuation
- Stock Usage/activity Report
- Labour activity report
- Labour Profitability Returns
- Jobs by Engineer/ Status/ Type report



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Tables

There are a number of tables available to the user to set up parameters and details to be used within the program such as:

- Engineers
- Message Recipients
- Support Contract Wording
- Travelling Charge Rates
- Labour Rates
- Suppliers



The screenshot shows a window titled "Labour Costs Setup" with a table containing the following data:

Grade/Name	Description	Per Hour	Cost	Standard Hrs	No of Employees
▶ Junior	Junior Fitter	15.00	6.50	37.5	1
Mechanic	Experienced Engineer	25.00	11.00	37.5	3
Foreman	Foreman	30.00	15.00	37.5	1
Specialist	Specialist Assistant	40.00	20.00		

A "Close" button is located at the bottom center of the window.

Perfect Service

Perfect F-gas

We have a sister product to Perfect Service aimed at companies who administer Fgas regulations on behalf of our customers.

The program encompasses a customer database and equipment register and monitors leak tests and refrigerant top-ups in accordance with fgas regulations. It also has a built in gas bottle tracking facility.

For more details please contact us or refer to our website www.gingercatsoftware.co.uk



Perfect Service

What do I do now?

If you have any questions regarding Perfect Service or if you wish to speak to an existing user please do not hesitate to contact us.

To request an onsite demonstration please let us know.

If you wish to order Perfect Service please telephone us and we will arrange a mutually convenient appointment when we will come an install and give some basic training to your users.

Thank you for your interest in Perfect Service.

Ginger Cat Software

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