Solarvista™

2-in-1

Field Service Management System
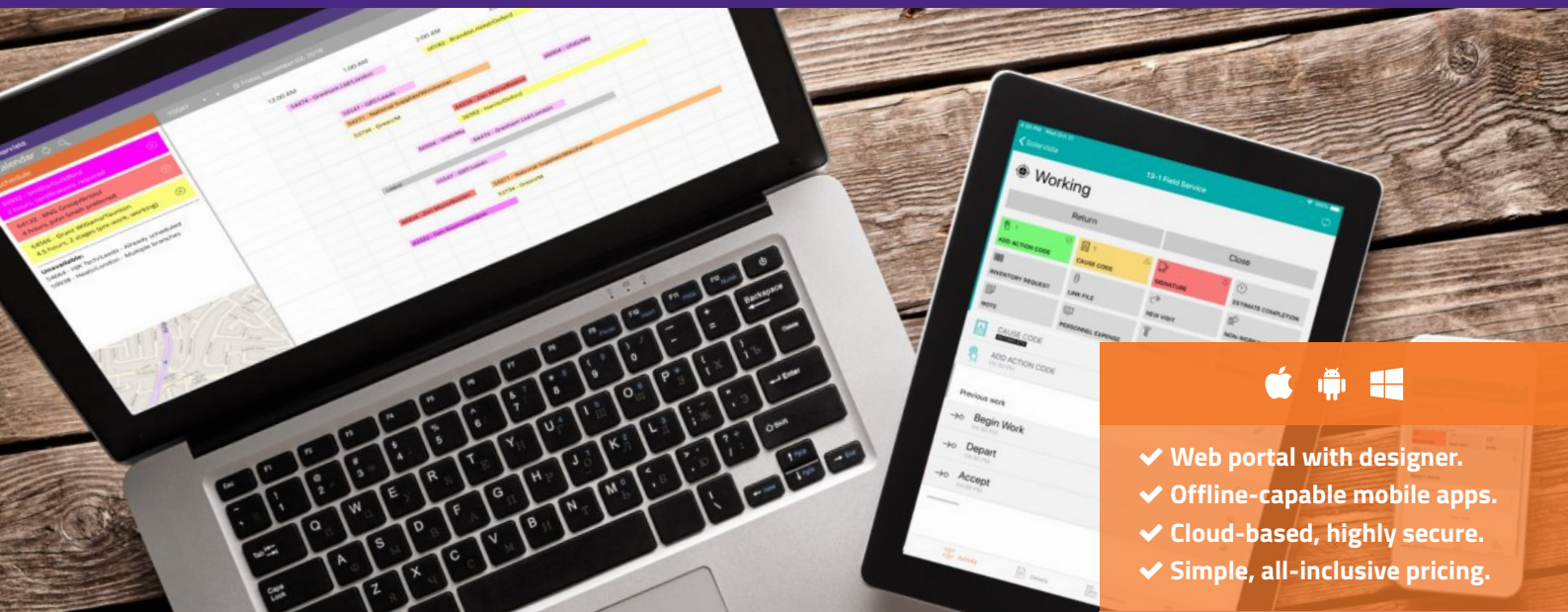
&

'No-code'

Application Platform

Join the 'no-code' revolution that's tranforming business agility!

MADE IN BRITAIN

Solarvista™

The 2-in-1 Field Service Management System & 'No-code' Application Platform

- ✔ **Web portal with designer.**
- ✔ **Offline-capable mobile apps.**
- ✔ **Cloud-based, highly secure.**
- ✔ **Simple, all-inclusive pricing.**

Combined power for ultimate flexibility.

Solarvista™ is the world's first '2-in1' field service management system that is combined with 'no-code' application platform technology, which is revolutionising business agility across the globe. It **streamlines** your field service operations by providing ready-made but **customisable** features that work together to create **intentful**, easy-to-use, business process automation. Running in both web and on phones, tablets and PCs/laptops, it lets you do more, with less, whilst improving **customer** experience.

Uses.

Use the same platform & mobile apps to facilitate multiple types of activity:

- Routines
- Projects
- Inspections
- Audits
- Installations
- Checklists
- Safety Compliance
- Quality Checks
- Repairs
- Maintenance
- Technical Service
- Feedback

MOST POPULAR!

Lite

A **basic** field service system with **customisable** features & no-code application platform.

Includes features for planning and processing work using ready-made & customised workflows, web portal and mobile apps with standard help desk support. Some restrictions on volume and configuration.

£21 per user/month
or US$23 / €24

Standard

A **full-featured** field service system with customisable features & no-code application platform with **connectivity**.

Everything in LITE plus:
Increased data volume, job costing, automated billing, parts and inventory, quotations and estimates (H1/23), basic developer API access, up to three standard integrations, rapid prototype service, priority help desk support and a customer success manager.

£36 per user/month
or US$42 / €44

Enterprise

A **full-featured** field service system with customisable features & no-code application platform with connectivity, **developer access** & **enterprise support** & **services**.

Everything in Standard plus:
Unlimited volume of records and/or configurations, connectors, integrations, enterprise-level priority support, multiple accounts, and full "high volume" developer API.

£call
or US$call / €call

Benefits.

- Avoid development costs.
- Instant design &deployment.
- Eliminate paper/email trails.
- Avoids re-keying data.
- Improves productivity.
- Reduces IT costs.
- Improves data accuracy.
- Ensures compliance.
- Keep stakeholders updated.
- Better business insight.
- Improve cash flow.
- Mobilise legacy systems.
- Gain business agility.

On-boarding We provide fixed price packages for setup & configuration. We'll review your requirements and setup/configure your account with you. For latest pricing & offers, visit **www.solarvista.com.**

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"With Solarvista, I now have an agile business that gets more done at lower cost. I can customise quickly and my operatives can use apps for their own devices, installed easily from public app stores."

SERVICE OPERATIONS DIRECTOR

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✉ sales@solarvista.com
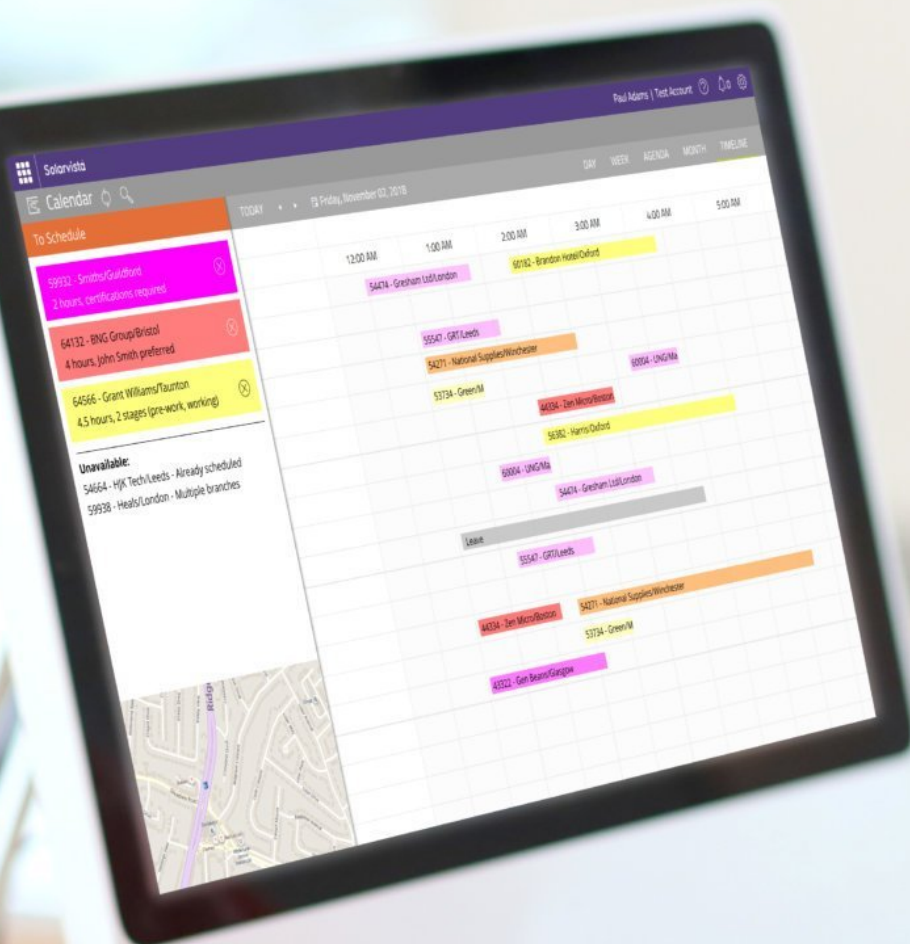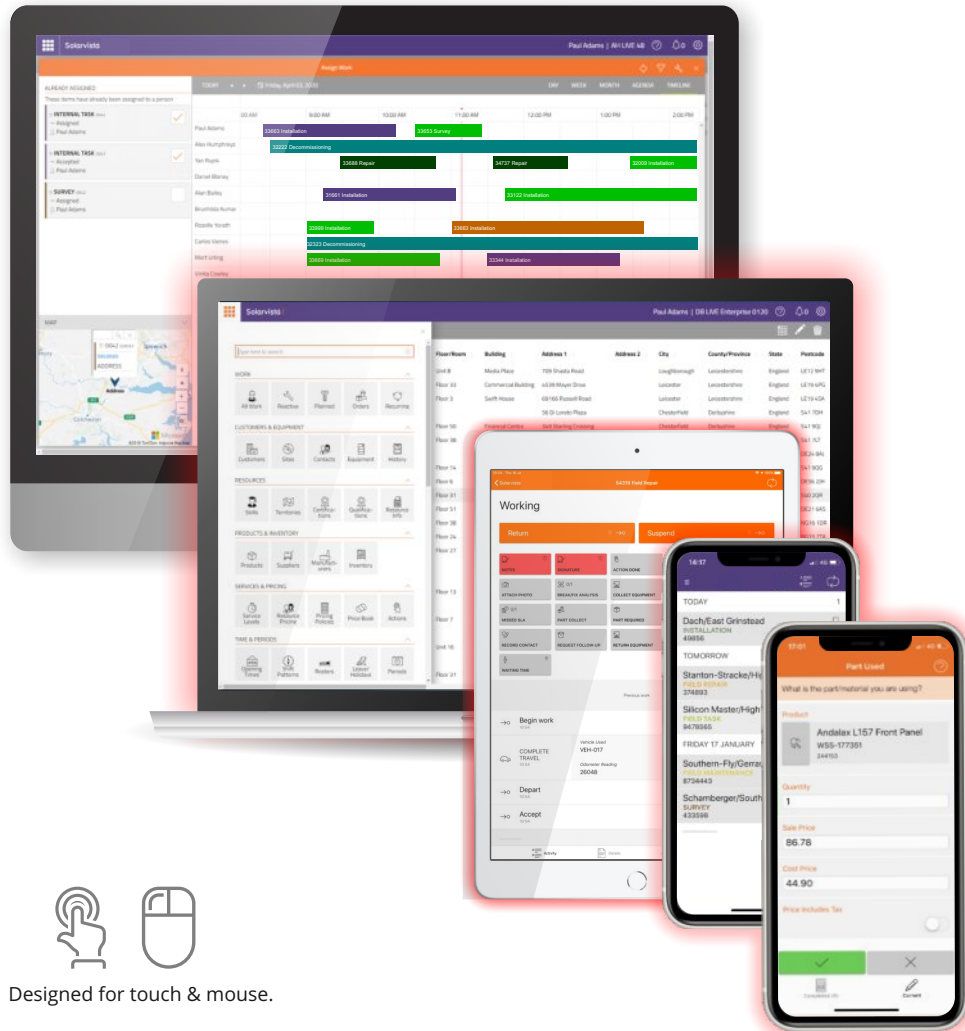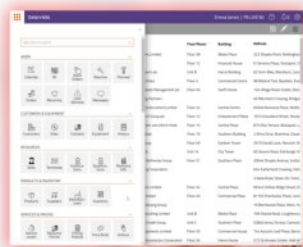
Designed for touch & mouse.

A **complete** field service management system…

Store all information you need to run your operation, including customers, sites, equipment/assets, products, inventory info, pricing policies, agreements/contracts, service levels, rosters, skills, qualifications, territories, responsibilities, knowledgebase, workflow definitions and much more.

Plan work using a calendar view for each operative viewable by agenda, timeline, day, week & month formats.

Bill easily as invoices are automatically calculated in real-time from your own rules and generated automatically for completed work or recurring fees from service agreements.

Screens show features dependent upon selected plan.

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Capabilities.

🔧 Field Service Management

Streamlines your field operations.

Transforms your field service operations by providing ready-made but customisable features that work together to create intentful, easy-to-use, business process automation for projects, repairs, installs, survey and maintenance.

📱 Mobile Workforce Management

Empower your field operatives.

Mobile apps for field-based workforces to receive work as part of defined workflows. They're specially designed to be super-easy to use, operating on mobile phones, tablets or PC/laptops and are available for iOS®, Android™ and Windows™.
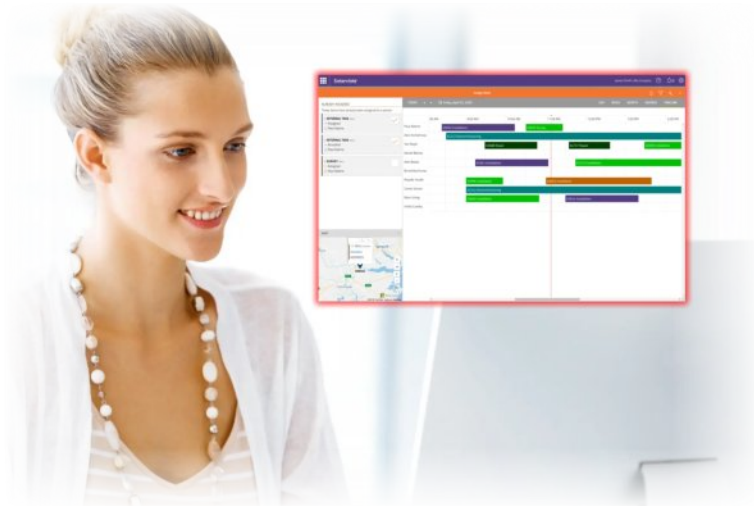

👆 Job Management

Get jobs done, faster.

Manage jobs easier, streamline processes and accelerate data capture. With both a web portal and mobile apps that work perfectly together to work everywhere and anywhere, it ensures a more efficient business.
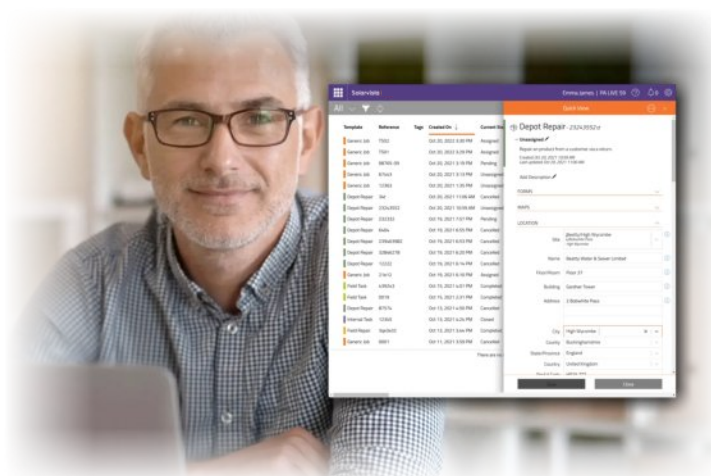
Scheduling & Dispatch

Plan work better and communicate instantly.

Solarvista includes an intuitive multi-user calendar with linked mobile apps to enable instant dispatch and real-time feedback of status. Work can be assigned to users using a drag and drop approach and candidates are offered to aid decisions.

Job Costing & Billing

**Plan work better and communicate faster.**

Solarvista includes features to automatically calculate, in real-time, the exact financial cost of any activity, and also compute any corresponding charges to be made, as a result of information held against customers, contracts or policies. This can then be used immediately to generate bills or collect payments.
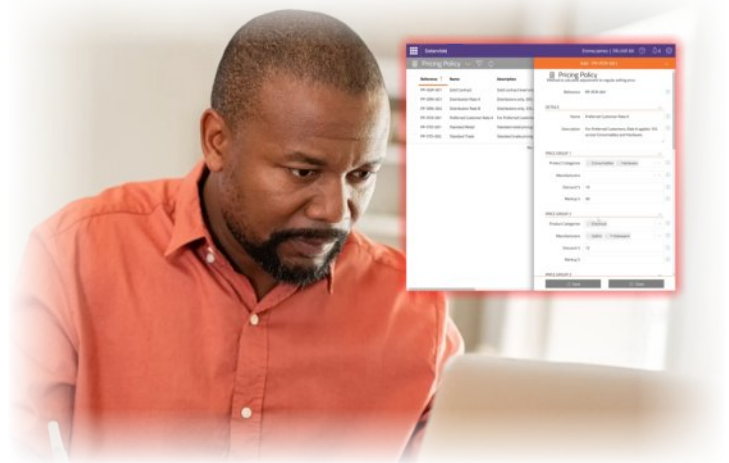
Agreements & SLAs

Manage contractual service & performance.

Solarvista includes a feature set for managing, renewing and billing contractual relationships between you and your customers. Ideal for service and maintenance contracts, it covers multiple sites, service levels, equipment, assets and recurring services.
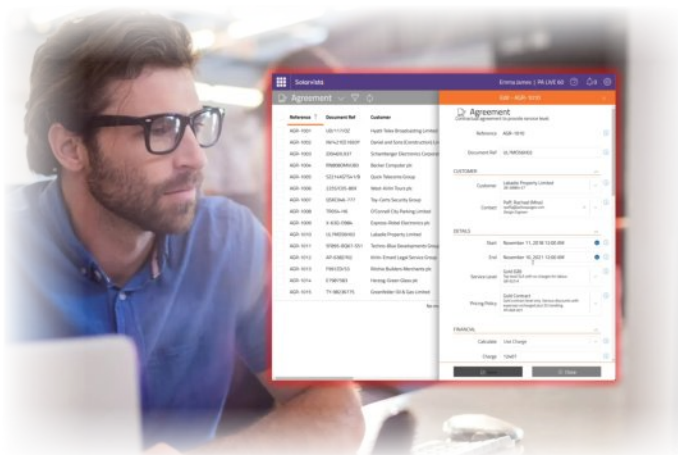
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↔ Accounting Integration

Keep accounting systems updated automatically.

Solarvista can interoperate with your existing accounting software, syncing relevant master data and posting billing and inventory data as required. As work is done, billing data is automatically generated, mapped to your ledgers and posted to your accounts system
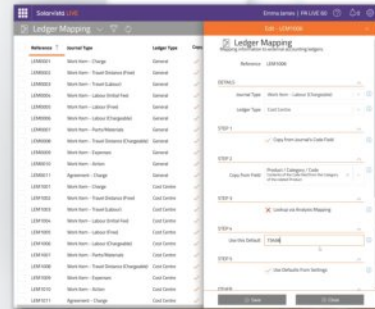
📈 Business Insight

Gain real visibility in how your business performs.

Solarvista allows all relevant data to be captured via intentful workflows that deliver just the right amount and quality of data to analyse using business intelligence tools. All data is accessible and transferrable to third-party tools.

📋 Digital Forms

Eliminate paper and digitise your data capture.

Solarvista includes a forms designer where digital forms can be created to replace inefficient paper of electronic files sent via email. Forms are easily populated when displayed on mobile or tablets.
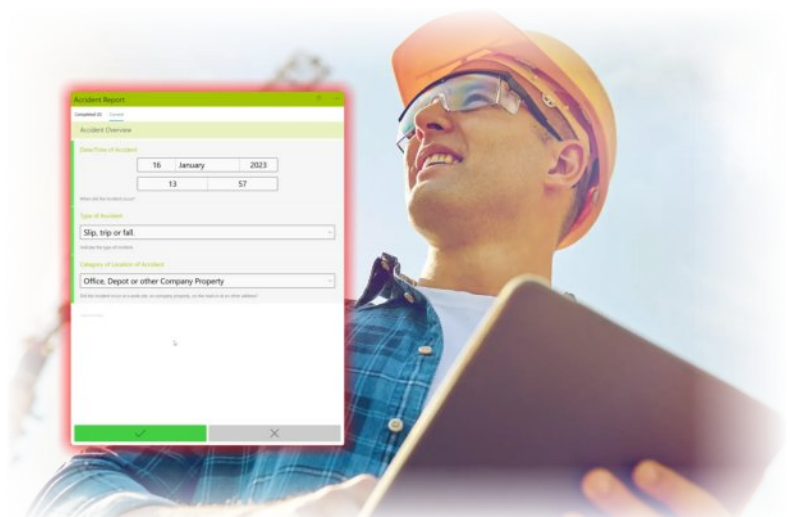
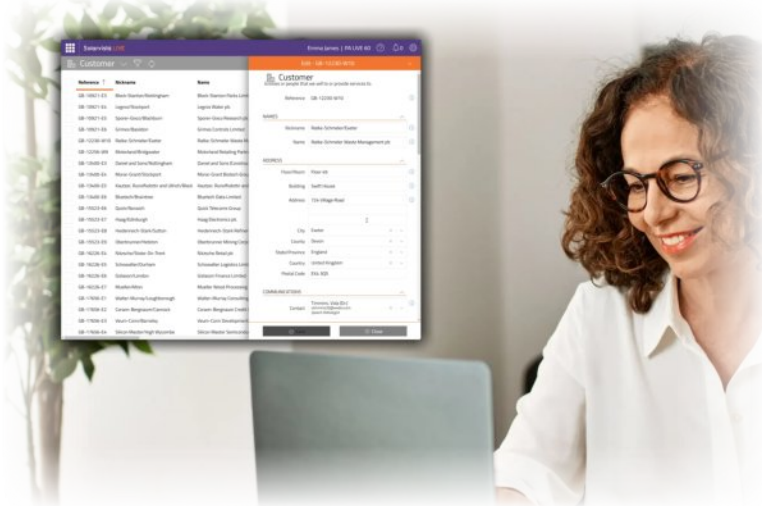## CRM & ERP Data

Hold all your business data in one place.

Solarvista can hold just the right amount of business and/or CRM data to empower your field service operations. This data combines with your activities to provide for efficient business processes.

Customer Portals

Provide customers with collaborative online access.

Solarvista includes an innovative security model for both UI and data access that allows you to offer custom portals to your customers and improve the overall customer experience. These portals can then be used by individual users within customers to accelerate efficiency.
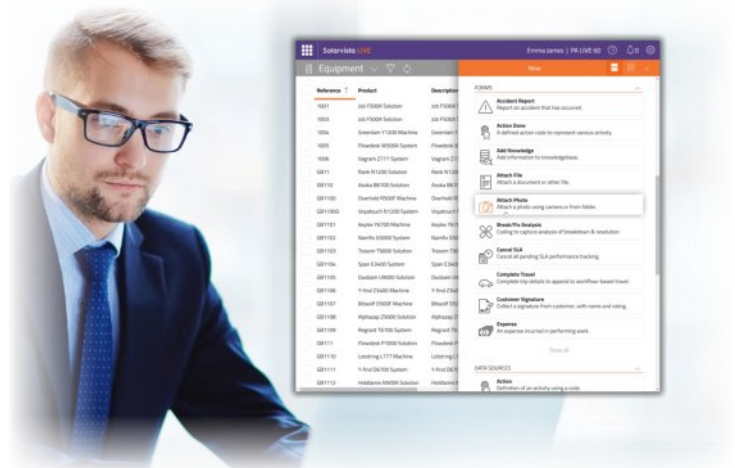
Parts & Materials Tracking

Track parts/materials whilst getting work done.

Solarvista includes a feature set for managing product masters and ability to track parts/materials usage within a field service or mobile workforce environment. You can create master product files and track, usage, movements, collections and requests.

🔔 Automated Alerts & Documents

Be alerted to issues & send documents to customers.

Solarvista includes an automated facility to notify users via portal, mobile app or email to issues related to performance, to help ensure smooth operations and customer satisfaction.

Data Automation & IoT

Automatically exchange data with other systems.

Solarvista includes automated data integration facilities that can post data to other systems or create new posted data internally from actions that occur, such as workflow stage transitions, forms and activities submitted or data being created, updated or deleted.

☰ Estimating & Quotations

Win more work... with less work.

Solarvista allows you to quote for work and then automatically generate work items for planning and generate relevant billing for payments. These quotations can be created on tablets or populated using mobile apps.

due H1/2023

Designed for touch & mouse.
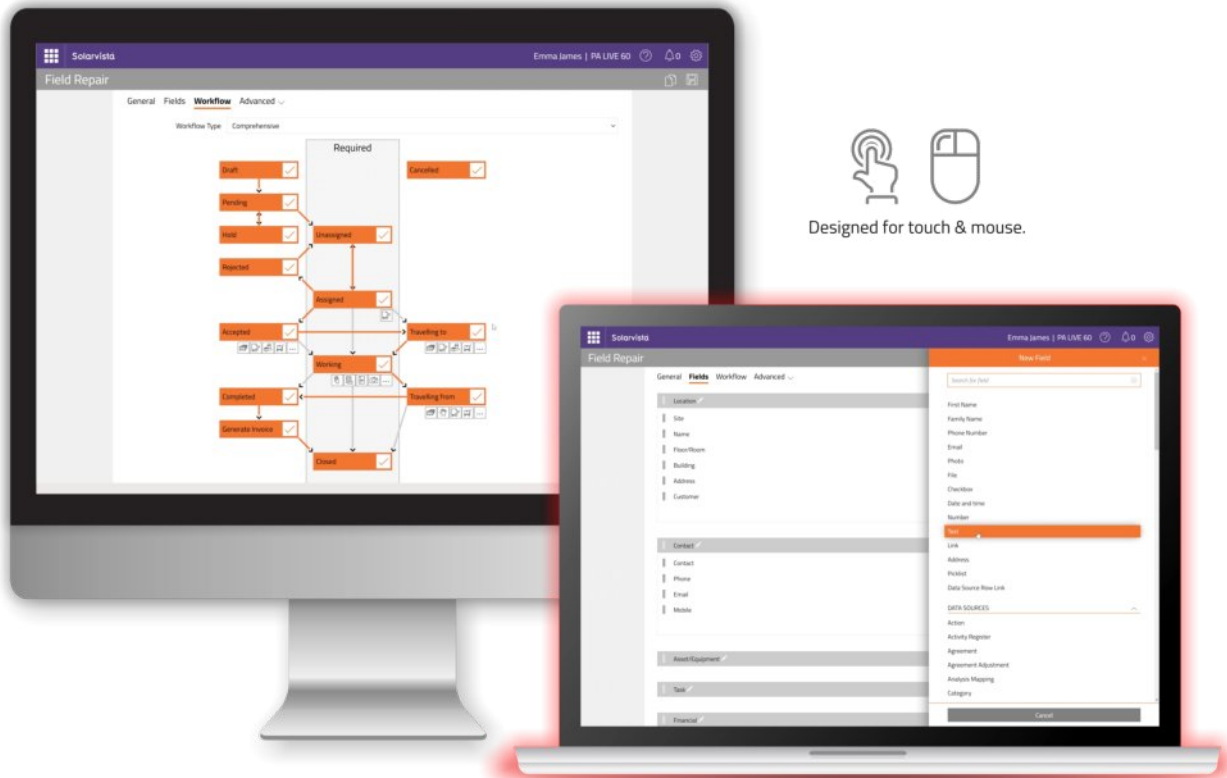
Create entirely new custom applications with **'no-code'** application platform...

(or modify or add to existing ready-made system capabilities)

Solarvista™ lets you configure your business processes and data sources using non-technical configuration and then **instantly** publish these to mobile apps and the web portal. The mobile apps work on iOS®, Android™ and Windows™ and interpret instructions in real-time even **offline**. Information collected can be viewed in the web portal, or sent to other cloud applications. It's **agility** means it can meet your needs today and quickly as they change in the future.

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Design menus for access to your data including work items, data source and calendars.

Example content shown. Menus and data views will show with your specific design & configured facilities.

Define your own data sources with named views and columns.
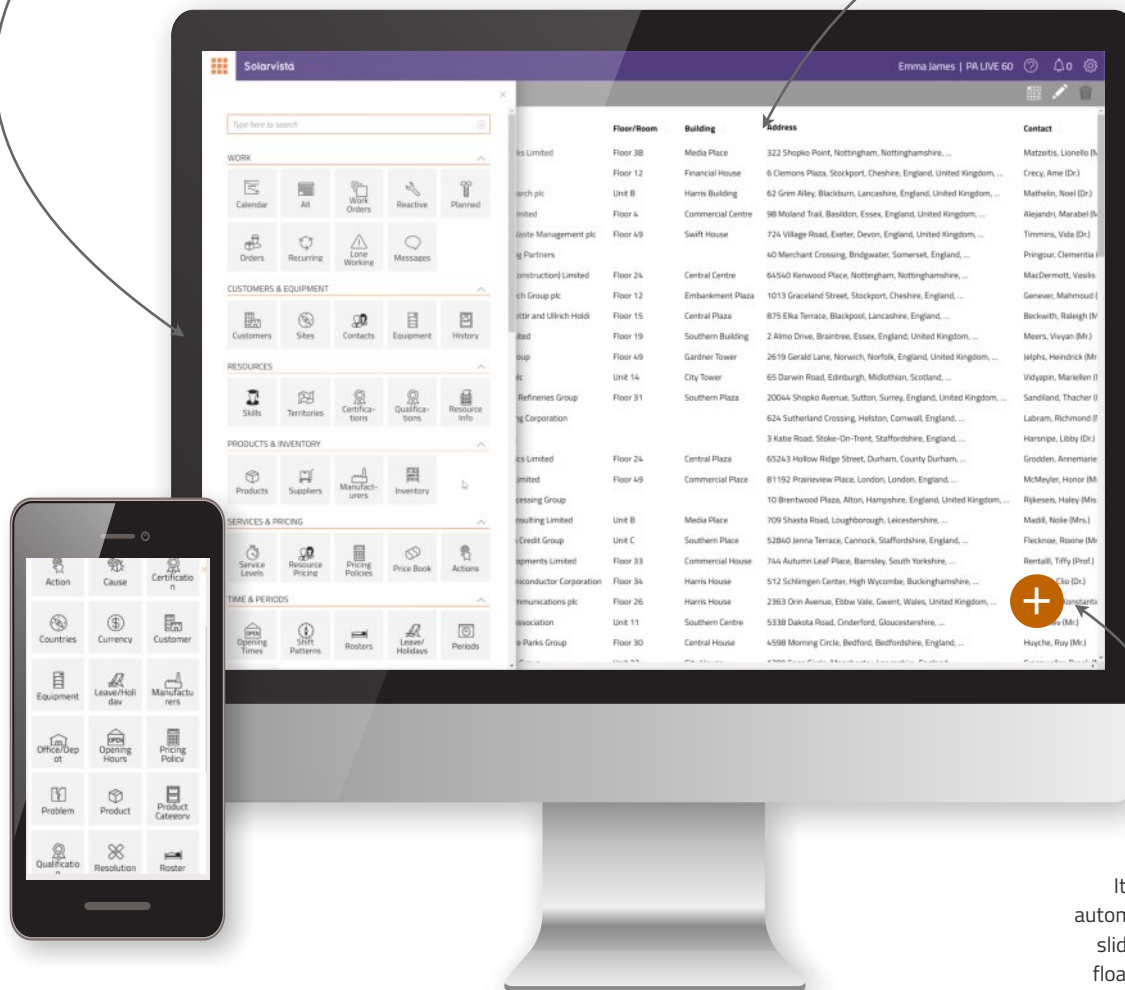
Web portal adjusts to tablet or smartphone use, if required.

Items you design automatically appear on a slide menu when the floating plus button is pressed.

Your designs create a **web portal**...

Built with responsive design so they work on your tablet or phone too.

Designed for touch & mouse.

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... with intuitive **mobile apps**.

These work offline too, for all device types & screen sizes.

You define workflow stages for specific types of work item.

Options to move from one workflow stage to another are displayed here.

A timeline shows completed or pending activities.

Your configured activities and forms, that are relevant to the current stage are shown here. Red denotes a mandatory item.

Custom fields can be placed on different tabs.

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Solarvista

Return on Investment.

+15% Productivity

+12% Revenue

+10% Satisfaction

-20% IT Costs

-90% Dev Costs

+100% Agility

+40% Insight

Benefits.

No expensive development costs.
You can build applications without deep technical knowledge; no need for expensive developers; no need to wait for apps; just click and save to publish.

Gain business insight.
With a built-in connector to Microsoft® Power BI™, your data can be posted in real-time to be displayed on dashboards & interactive reports.

Save time & increase productivity.
Avoid unnecessary phone calls and manual completion of paperwork or long-winded documents attached to emails.

Use the devices you already own.
Because our mobile apps are available for iOS®, Android™ and Windows™, your operatives can use the devices they prefer or already own.

Increase business agility.
React quickly to new business demands as you can make design changes to the system yourself and publish these instantly to your users.

Easy & smooth mobile roll-out.
The mobile apps are available for free from major app stores and updated automatically. They are designed to be quick to learn and easy to use.

Improve compliance.
Ensure compliance with standards and processes by mandating key activities at key moments and ensuring data captured is complete and validated.

Reduce IT costs.
The software is accessed via a modern web browser and native mobile apps. There's no need for additional servers or expensive IT personnel.

Improve IT security.
We run entirely within Microsoft® Azure™ data centres which operate to the highest reliability, resilience and security standards.

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The 2-in-1 Field Service Management System & 'No-code' Application Platform

Specifications.

Features/services are dependent upon the plan selected for your account.

🔧 Feature currently in *preview* status.
Ⓢ Feature available in *Standard* plan and above.
Ⓔ Feature available in *Enterprise* plan only.

SAAS/TECHNOLOGY

ARCHITECTURE
Multi-tenanted, cloud-only microservices architecture. Uses "planet-scale" Microsoft® Azure™ Cosmos DB with fast HTML5/JavaScript/CSS web client and native mobile apps.

SECURITY
128-bit SSL encryption between web browser, apps & cloud services.

USER AUTHENTICATION
User authentication via Microsoft® Work or School Account (Office 365), Microsoft® Personal Account, Google ID, or Apple ID.

WEB PORTAL
Responsive design for desktop, tablets & phones supporting both mouse & touch input.

MOBILE APPS
Native apps for iOS™, Android™ & Windows™. Apps work offline or online (some features do require online access e.g., for data searches). Installed & automatically updated via major app stores. Responsive & scalable to device size.

DATA CENTRES
Operated within Microsoft® Azure™ ISO27001 accredited data centres in UK, NL and IRL (US and AU/NZ coming soon).

BACKUP
All data within account is backed up within the data centre automatically every four hours.

ARCHIVING
Static data e.g., customers, products etc is permanently stored. Dynamic data i.e., work items & forms is held for 365 days after closure and then moved to long term archived storage.

MULTIPLE ACCOUNTS Ⓔ
Operate multiple accounts from within web portal. Connect mobile apps to multiple accounts at one time. Useful for larger organisations to segment data and configurations.

RESILIENCE/RELIABILITY
Service bus architecture helps deliver minimum 99% uptime per annum, including planned maintenance periods where access may be restricted.

APPLICATION PROGRAMMING INTERFACE Ⓔ
Full programmatic control via REST-based API (application programme interfaces) (subject to fair usage throttling and limits).

2-IN-1: FIELD SERVICE MANAGEMENT SYSTEM

CUSTOMERS
Stores customer name, address, phone, email, contact, billing currency, tax rate, time zone, opening hours, territory, & required certifications in & above.

SITES
Linked to customers, or may be independent, stores address, contact & preferred operatives. On site access certifications, territory & opening hours in [?] & above plans.

CONTACTS
Stores names and roles for contacts associated with customers, sites & suppliers. Holds communication permissions.

PRODUCTS MASTER
Used as master for parts, materials & equipment. Stores code, description, category, unit, manufacturer & part number, cost price, selling price & supplier.

EQUIPMENT/ASSETS
Optionally linked to sites, optional link to product, description, serial number, specific location in site. Optional service level, agreement, optional start date and/or end date, charge in [?] & above.

SERVICE LEVELS/LABOUR RATES Ⓢ
Used with work items, customers, agreements & equipment, these define how quickly & when service should be provided. Holds name, days of week, hours of day, start and complete times (in hours) & validity dates. In addition, holds charge rates for working/travelling labour and distance.

AGREEMENTS/CONTRACTS
Holds service relationship between your organisation and customer. Stores customer, start and end dates, service level, charge, tax rate, billing interval, and pricing policy applicable.

SKILLS/QUALIFICATIONS/CERTIFICATIONS
Holds skills, qualifications & certifications ready to be assigned to operatives, including validity dates. Used with calendar feature to assist with work item assignment.

CALENDARS
Responsive (i.e., scales to device) calendar view for each operative viewable by agenda, timeline, day, week & month formats. Drag & drop from unassigned workflow stage to assign to operative & set scheduled date/time for working stages. Automatic filtering of mobile operatives by criteria based upon each work item to be scheduled (manual option available also).

APPOINTMENT BOOKING Ⓢ
Request appointments for least-cost (determined by shortest travel time) and free-time in calendar. Appointments also offered based upon skills and territorial responsibilities.

SHIFTS/ROSTERS
Operatives can be assigned to Rosters which refer to Shift Patterns which then automatically create non-working time in Calendars.

LEAVE/HOLIDAYS
Mobile operatives can submit requests for leave/holiday time. These appear in web portal for approval. Once approved, non-working time is marked in calendars.

SICKNESS NOTICES
Mobile users can report immediate unavailability due to sickness. This is immediately marked in calendars.

WORK ITEMS
Ready-made templates for a range of styles of work, including:
- Generic (comprehensive/all features)
- Field Repair
- In-house Repair
- Depot Repair
- Installation
- Field Maintenance
- In-house Maintenance
- Survey
- Field Task
- In-house Task
- Help Desk Call

All templates can be edited or copied to new designs for complete customisation. Ability to add tags for filtering in views. Work items assigned to operatives are transmitted to the mobile apps which then follow prescribed workflows. Every work item is controlled by a workflow designed to operate with the mobile apps. This allows easy yet controlled update of stage & restricts options presented to user. Choice of workflow styles with on/off toggles for specific stages. Each workflow stage then mandates selected activities or forms to be completed and controls next stage choices.

RECURRING WORK
Automatically generate work items (to a defined template). Optionally set to auto assign to a specific operative. Set to recur daily, weekly, weekdays, monthly or one-time.

LABOUR
Labour time is tracked in real-time as operatives move through workflow stages that are marked as schedulable. Extra labour can also be recorded outside of real-time workflow and optionally for other operatives if required.

PARTS/MATERIALS
Record parts used utilising search facility to Products. Record quantity used and optional selling price. Create requests for parts required which are viewed within web portal. Record when parts are collected from suppliers or when moved from one location to another.

INVENTORY LEVELS ⑤
Optional tracking of quantities by product and location (text location code, user, vehicle, or office/depot). Updated from activities submitted via mobile operatives (or may be synchronised to an external inventory management system where feasible (extra charges apply).

BREAK/FIX ANALYSIS
For repair-style work, record Problem and Resolution codes during activity. In record Symptoms and Cause too.

NOTES
Enter unlimited free text notes via mobile (also allows voice-based input if device supports it).

ACTIONS DONE
Enter multiple actions via mobile apps to track activity. Actions can also be used to enable easy entry to combine labour and a selection of products which are automatically added to the work item and optionally charged for.

FOLLOW-UPS & ALERTS
Set a future reminder with date/time, note and optional named user. Follow-up information appears within web portal and can be assigned to mobile operatives for viewing via mobile apps.

BREAKS & WAITING TIMES
Mobile operatives may track breaks (non-working time) as well as time spent waiting e.g., where access is not available.

PROJECTS ⑤
Work items may be processed as part of a project, with option to consolidate billing/invoices. Mobile operatives can supply simple project updates including summary status reports and progress percentages which are posted to Project record for review.

LONE WORKING ⑤
Mobile operatives can send notices from mobile of a lone working risk period ahead which is displayed as an internal notification within portal (NOTE: not suitable where BS 8484:2016 compliance is required). Actions can be used to connect to other messaging systems (additional configuration - extra charges apply).

MOBILE FORMS
Design customised forms for use via mobile apps. Field types supported are Text, Number, Decimal, Yes/No, Photo, Signature, File/Document, Address (with Gazetteer) or Link. Picklist and search controls to select from static or dynamic data. Conditional flow expressions allow selective control of fields presented to user. All forms can be presented during specific workflow stages or available anytime.

SIGNATURE CAPTURE
Capture signatures via forms using mobile apps at any workflow stage. May be mandatory or optional.

DOCUMENTS/PHOTOS
Attach files to work items, via web portal, which are automatically downloaded to mobile apps. Create document or photo fields within forms which can be mandated at key points in workflow. Mobile apps allow direct capture from camera where applicable or from camera roll/library.

ROUTINES/CHECKLISTS
Create forms for routine services or compliance checks which prompt for tasks to be performed or data to be captured. Forms can be added to any work item template at any stage for pre, during and post work routines. Answers given can drive conditional flow to skip sections.

MISSED SLAs
When an SLA performance point is missed, the impact upon customer, duration of time late and reason missed may be captured. This is posted to a consolidated 'Performance' data source for review/analysis.

JOURNAL & COST/CHARGE ANALYSIS ⑤
Automatic calculation of costs and charges, where applicable. Automatic analysis by other dimensions e.g., period, type of work, location, customer/industry, product/equipment, parts/materials, actions, commercial & contractual, resources, break/fix coding, knowledge and account or work ownership. This data facilitates in-depth, but easy analysis of profit/loss from any business perspective.

BILLING/INVOICES ⑤
Automatically generate invoices (or billing data) from completed work items using rules set in products, pricing policies and service levels. Consolidate billing by project or work order. Billing is generated using the currency set within the customer record. Automatically generate invoices (or billing data) for agreements with recurring billing at key intervals.

ACCOUNTING LEDGER MAPPING ⑤
Automatic determination of accounting ledger codes (General, Cost Centre & Dept) for any posted invoice or journal line item based upon hierarchy of rules applied to determine it (simple defaults though to complex mapping).

LOCATION TRACKING
Capture location using mobile device location services (therefore device specific) upon workflow transitions & form submission. Locations are displayed within maps in web portal in various points.

HISTORY
Key information from any work item activity is posted to a consolidated 'History' data source for easy viewing of customer, site, work history.

KNOWLEDGEBASE ⑤
Mobile operatives can post Q&A style information to an internal 'Knowledgebase' data source. Break/Fix coding is also optionally posted too.

CONTACT/CRM
Customer relationship events such as phone calls, notes, or meetings can be posted via web forms in portal or from mobile apps, which work offline (these are populated to

consolidated 'History' data source) and associated with customers, sites, contacts, agreements and/or projects.

QUOTATIONS [due H1/2023] ⑤

Create quotations using information from products, services and agreement pricing adjusted for pricing policies determined by customer. Convert quotations to work orders, work items, agreements, or requests/orders.

2-IN-1: 'NO-CODE' APPLICATION PLATFORM

DATA SOURCES

Create custom data sources to hold additional information. These data sources are accessible directly by picklist or search fields in other data sources, forms or work items in web portal or mobile apps.

WORK ITEMS

All templates can be edited or copied to new designs for complete customisation. Ability to add tags for filtering in views. Work items assigned to operatives are transmitted to the mobile apps which then follow prescribed workflows.

ACTIVITIES/FORMS

Design customised activities/forms for use via mobile apps. Field types supported are Text, Number, Decimal, Yes/No, Photo, Signature, File/Document, Address (with Gazetteer) or Link. Picklist and search controls to select from static or dynamic data. Conditional flow expressions allow skip of sections. All forms can be restricted to specific workflow stages or set as ad-hoc.

BUSINESS LOGIC ⑤

Access business logic from field service management system. Build new business logic using external tools such as Microsoft® Flow. Trigger business logic (or call third-party web services) upon workflow stage changes (entry/exit), activity/form submissions, and data sources created, updated, or deleted.

FIELD TYPES

Add new fields with types for text, number (whole or decimal), image/photo, document/media, true or false, picklist (from text), picklist (from data source or work item), address with gazetteer, and link. Each field has option for help text, which is automatically rendered in web portal and/or mobile apps.

DYNAMIC CONTROL

Control visibility of fields and whether

mandatory from values in other data fields.

VIEWS & MENUS

Create custom views (or groups of views) with filters, query expressions & column selection. Save to main menu with custom icon/name. Main menu in portal is fully configurable with editable icons, naming and sections.

AUTOMATED ACTIONS/INTEGRATIONS ⑤

When work items transition through workflow stages, or when activities/forms are submitted, or when a data source row is created, or edited or deleted:

- Send an email using HTTP connector and third-party email product (not included).
- Post to any data source via data gateway.
- Post to a Microsoft® Power BI (not included).
- Call a third-party web service.
- Automated actions are subject to limits based upon subscription/plan selected.

CONNECTORS ⑤

Microsoft® OneDrive™ with ability to read/write files from specific location. Microsoft® Power BI with push post to data table created via web portal. Generic HTTPS web connector. Connectors are subject to limits based upon subscription/plan selected.

CALENDARS

Calendar view for each operative viewable by agenda, timeline, day, week & month formats. Drag/drop from unassigned workflow stage to assign to operative & set scheduled date/time for working stages.

WORKFLOW CONTROL

Every work item is controlled by a workflow designed to operate with the mobile apps. This allows easy yet controlled updates at each stage & restricts options presented to user. Choice of workflow styles with on/off toggles for specific stages. Each workflow stage then mandates selected activities or forms to be completed and controls next stage choices.

RECURRING WORK/TASKS

Automatically generate work items (to a defined template). Optionally set to auto assign to a specific operative. Set to recur daily, weekly, weekdays, monthly or one-time.

SIGNATURE CAPTURE

Capture signatures via forms using mobile apps at any workflow stage. May be mandatory or optional.

DOCUMENTS/PHOTOS

Attach files to work items, via web portal, which are automatically downloaded to mobile

apps. Create document or photo fields within forms which can be mandated at key points in workflow. Mobile apps allow direct capture from camera where applicable or from camera roll/library.

ROUTINES/CHECKLISTS

Create forms for routine services or compliance checks which prompt for tasks to be performed or data to be captured. Forms can be added to any work item template at any stage for pre, during and post work routines. Answers given can drive conditional flow to skip sections.

LOCATION TRACKING

Capture location using mobile device location services (therefore device specific) upon workflow transitions & form submission. Locations are displayed within maps in web portal in various points.

DATA IMPORT

In-built tool that imports a CSV text file and allows selection/mapping of fields to any data source or work item.

MANUAL DATA EXPORT

Manual selection of work items within views or using queries which then allows export to CSV or JSON.

AUTOMATED DATA EXPORT

Optional periodic batch export of data in CSV text format posted to connected Microsoft® OneDrive account.

DASHBOARDS/BI EXPORT/SYNC ⑤

Real-time dashboards are supported via the use of a separate Microsoft® Power BI account (not included - must be purchased separately).

REPORT & DOCUMENT DESIGNER ⑤ [due H1/2023]

Design documents and/or reports for use with automated actions.

WORKFLOW AUDIT

Key workflow stages displayed with each work item.

DEVELOPER API ⑥

Full programmatic control via REST-based API (subject to fair usage throttling and limits). For more, see developer.solarvista.com.

GAZETTEER

Built-in worldwide database for cities, counties, provinces, states, and countries (used for accurate and/or consistent address entries).

PROFESSIONAL SERVICES

ON-BOARDING/TRAINING

Fixed price packages include setup and configuration, including work item templates & forms if required, combined with introductory training done remotely using web meetings.

HELP DESK & SUCCESS TEAM

Contact with our help desk can be made via portal or via email. Phone support is also available on Standard & Enterprise plans. Enterprise plan support offers a guaranteed response time of eight working hours from confirmed receipt of request.

CUSTOM INTEGRATIONS

We will connect Solarvista to any other system providing it has a suitable API. Additional charges may apply, depending upon complexity.

CUSTOM BUSINESS LOGIC

We will add customised business logic to Solarvista using Microsoft Flow. Additional charges may apply, depending upon complexity.

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The 2-in-1 Field Service Management System & 'No-code' Application Platform

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Solarvista™

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Microsoft Partner | Silver Cloud Platform
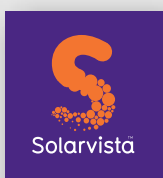
About us.

Established for over two decades, Solarvista™ are the UK's leading independent developer of workforce mobility & field service software and have delivered solutions to thousands of users. Our investment in R&D has facilitated our innovative no-code technology and the world's first "2-in-1" Field Service Management System & 'No-code' Application Platform. As an accredited Microsoft® Cloud Partner, we build our solutions in Microsoft® Azure™ for the best combination of security, resilience and reliability. We have implemented our solutions for companies in every type of industry and have a proven capability of delivering solutions for large enterprise as well as medium and small businesses.

We're used by some of the best known brands and industry leaders...

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