

For any business involved in construction and installation -

- the interactions involved in designing, specifying, installing and servicing equipment are key to customer relationship management (CRM)

Integration & Customisation

- Vehicle tracking
- Accounts software
- Website and REST requests
- Anything else.

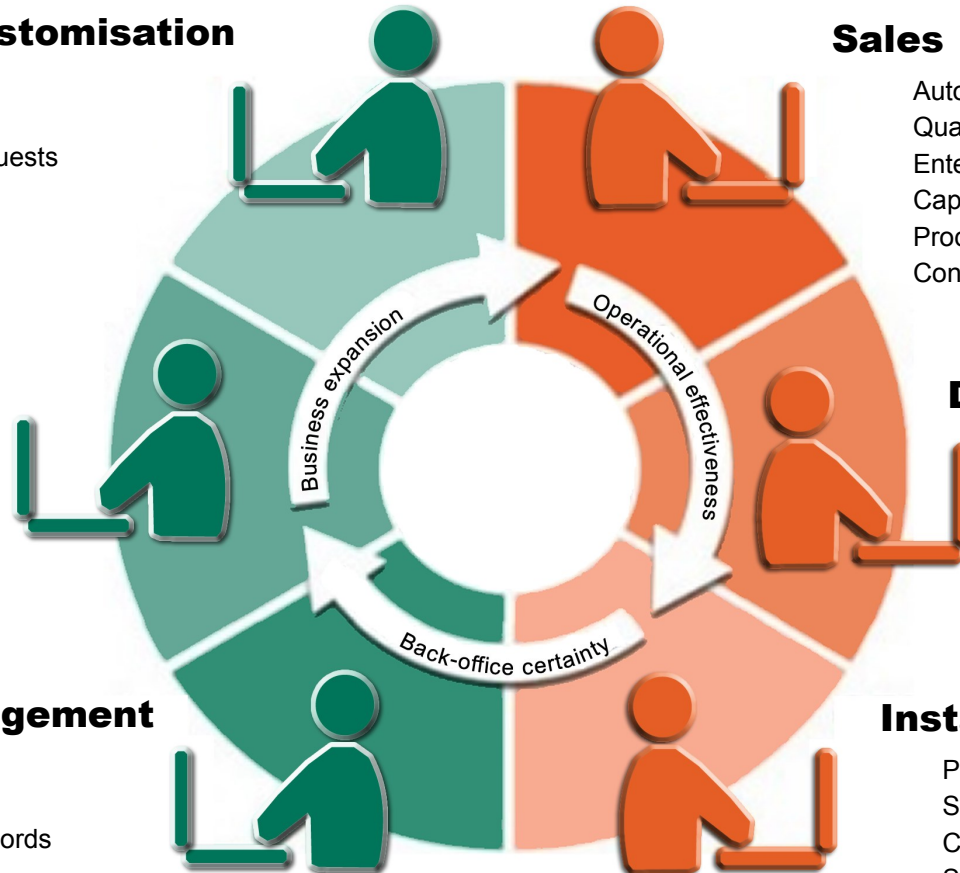
Administration

- Record and track payments
- Manage administration tasks
- Track all open orders
- Take servicing requests
- View client, order, & asset details

Asset Management

- Specify location *
- Record asset particulars
- Manage commissioning records
- Manage servicing records

* for Facilities Management etc.



Sales

- Auto-capture of new leads
- Qualify & advance sales opportunities
- Enter approximate design specification
- Capture approximate site constraints
- Produce estimates
- Convert to sales orders

Design & Project Management

- Capture detail of site constraints
- Specify needed components and detail
- Schedule site "fixes" as needed
- Assign necessary supervision & labour

Installation

- Phone based, individualised calendars.
- Site location & customer details
- Component check-lists & detailed specifications
- Site particulars, measurements & constraints
- Record inspections - QA, commissioning certificates and/or servicing records etc.

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