

International Sales Direct Software Proposal

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Overview

The software for International Sales Direct will be called ISD Service Manager, and will assist ISD (International Sales Direct) employees in scheduling servicing for their products.

Products

The products that the software will support are the following:

1. Solar Water Heaters
2. Air Conditioners
3. Reverse Osmoses or Filtration Systems

Each product will have its own settings and service intervals which will be discussed later on.

Entry of sold Products

Entries of sold products into to the database through the software can be done by importing CSV files. The CSV files will include the information required to enter the product and to identify the product. The CSV file will also include the unique code of the sold product, and the type of product can be identified by the first two letters of the sold product unique code. The type of product will be one of the three mentioned above, and each will have its own service intervals. CSV files will be imported every end of month by International Sales Direct; so the unique code of the sold product will be used to identify each sold product in the application database so that duplicated entries are avoided.

Service dates

The CSV does not include last service date. Since this is needed for products which are older than their service interval, this has to be entered manually when importing a CSV. After importing, all the products which require a last serviced date will be shown, and the dates have to be entered manually. For more information see Services section.

Entry of Solar type products

When the sold product is identified to be of the type of Solar Water Heater, the application will ask the user whether the solar has “Small Tubes” or “Big Tubes”. This has to be selected manually for each solar entry so that it is entered in the database as the CSV file will not provide this data.

Entry of other type of products

All information for the other two types of products will be provided by the CSV file.

Product Codes

The three product categories are each divided into different branded products. The codes of each of the product categories are the following:

1. Solar Water Heaters
 - a. SH
 - b. SW
 - c. SS
2. Air Conditioners
 - a. CD
 - b. AC
 - c. AP
3. Reverse Osmoses or Filtration Systems
 - a. OA
 - b. AA
 - c. IA
 - d. NA (Currently AA)
 - e. ON

Note: Since NA's code is currently AA in CSV files, and AA is a duplicate entry, then if the application encounters an AA code while importing a product from a CSV, it will ask the user what type of product it is (Either AA or NA [Niagra]). Depending on the choice of the user, the new codes (AA or NA) are used for the application database.

Services

The service interval differs according to the type of product sold. In the case of Reverse Osmoses, the service intervals also differ by the type of brand of product as well. Each product can have more than one service interval. Below is a breakdown of the services required.

SH, SW, SS:

- The magnesium rods have to be changed **once every two years**.
- Also every other service (ie. **Every four years**) client is given an option of just changing the rods or changing the rods and doing a service – this will be noted in the application. If the client chooses to change the rods only, the next time the same (2yrs after) the option of choosing rods only or rods and service will come up. If the client chooses to do both rod changing and service, the next time this option will come up is after another **four years**.

CD, AC, AP

- Service done **once yearly**.

OA

- **Every six months** the change of one white filter is needed.
- **Every one year** full change of all 4 filters.
- **Every 3 years** change of membrane is needed.

AA

- **Every six months**, both filters to be changed
- **Once yearly** client purchases the 4 filters. This will be shown as a notification in the notification screen.
- Membrane Change **every 3 years**

IA

- **Every four months** – service. Client can have the following options: 1 black + 3 white filters, 2 Black 3 whites, 1 black 6 whites

NA

- 1 Filter changed **every six months**
- Membrane Change **every 3 years**

ON

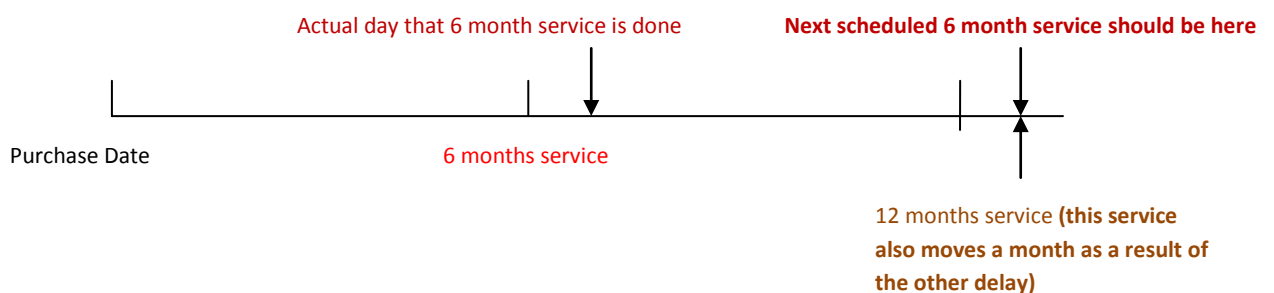
- Whole pack changed **once yearly**
- One filter changed **every six months**
- Membrane Change **every 3 years**

Notes

The Solar water heaters have more than one service; therefore a record of the next date for **each service** will be kept individually. If one of the dates is delayed, then all the other following dates including dates of the other services of that same product will be moved by the delayed time.



The following diagram shows what happens if the 6month service is delayed.

**Manual insertion of last service date**

As described before, old entries of products have to have their last service date entered manually since the CSV file does not provide it. In cases where there is more than one service interval for a specific product, one or more last service interval dates have to be entered depending on the age of the product installed. Below are a list of all the products and how much old they should be for the application to ask for manual insertion of last entry date.

SH, SW, SS:

- **1 Year 11 months or older**

CD, AC, AP

- **11 months or older**

OA

- **5 months or older** asked for the 6 month last service interval dates.
- **11 months or older** asked for the 6 and 1 year last service interval dates.
- **2 years 11 months** asked for all three last service interval dates.

AA

- **5 months or older** asked for the 6 month last service interval dates.
- **11 months or older** asked for the 6 and 1 year last service interval dates.

IA

- **3 months or older**

NA

- **5 months or older**

ON

- **5 months or older** asked for the 6 month last service interval dates.
- **11 months or older** asked for the 6 and 1 year last service interval dates.

Service Notifications

The Application's main screen will show a list of all the required services 1 week prior the scheduled service. Each entry will show the main details of the sold product, and the list can be filtered on any of the fields. Also, a search box allows the user to search anything in this list. If one of the services is clicked, a separate screen will show all the details for that product, including some options for the status of the service. Each of the entries will be phoned and the person in charge of International Sales Direct servicing will change the status accordingly. The products can have the following statuses:

- Did not answer (in this case, the sold product notification will be moved to the next day. The number of times that the product is marked as "Did not answer" is kept, and if the client is phoned for 3 times without answering, a letter is shown and a print button allows the user to print the letter as shown in the letters section, and the status becomes automatically pending and will not show again until manually marked as Serviced)
- Do not want to be services (In this case the sold product will become inactive and no more notifications in the future are shown until the account is activated again manually)
- Service appointment created
- Phone again in: (if this status is chosen, a field where the user can enter a number and a dropdown box of "days", "months" is shown. Once the user clicks ok, the notification will move to the amount of days or months specified.)
- Pending (Will become pending and will not show in the service notifications screen until manually marked as serviced – this option cannot be chosen manually, therefore it will not be available for the user in the drop down list)
- Serviced (Once the technicians come back with a service note, the specific product is marked as Serviced, and the last service date is recorded for the calculation of future services. The future service is recorded from this date and not from the date that the product was supposed to be serviced (since there can be delays from the actual date that the product is serviced)
- Inactive

Any products that are not marked any status will be left in the service notification screen until any status is marked on them.

Inactive screen

This screen will show all inactive products and allows filters and searches. Details of any entry can be shown and each can be marked back as active.

Pending screen

The pending screen will show all pending products. Filters and searches can be done, and each entry can be marked as Serviced or inactive as required.

Service In Progress screen

All products which are marked as "Service appointment created" will be shown on this screen. Once the technician confirms that the service was done, the user can go to this screen, search for the specific product, and mark it as Serviced. The current date will be recorded as the last service. Search and filters can be applied on the list

All Entries screen

This screen allows users to search and filter all products in the database.

Letters Notifications

When a product is marked as “Did not answer” for 3 consecutive times, a letter will be available for printing.

Letters will be printed according to different criteria as shown below:

ON

Dear #Name#,

After making three attempts to contact you via phone, we are now notifying in writing that your filters of the Osmosina are due for change.

Kindly note that if you choose not to change them it can result in permanent damage in the machine and also in undrinkable water flow.

Kindly contact us at your earliest to make an appointment on 21 482 166 or by email on isd@melita.com.

Regards
Customer Care
International Sales Direct

Solar Water Heaters

Dear #name#,

After making three attempts to contact you via phone, we are now notifying in writing that your Solar water heater magnesium rods are due for replacement.

Kindly note that if you choose not to change them it can result in limestone forming in the tank thus damaging the whole system. In this case you will also forfeit your right for 5 year guarantee period, if it applies.

Kindly contact us at your earliest to make an appointment on 21 482 166 or by email on isd@melita.com.

Regards
Customer Care
International Sales Direct

Air Conditioners under guarantee

Dear Mr Vella,

After making three attempts to contact you via phone, we are now notifying in writing that your Air conditioner is due for service.

Kindly note that if you choose not to do the service may I remind you that you will forfeit your rights for the 5 year guarantee period.

Kindly contact us at your earliest to make an appointment on 21 482 166 or by email on isd@melita.com.

Regards

Customer Care

International Sales Direct

Note that Guarantee date is calculated by the application by getting the invoice date (when the AC was installed) and checking the current date. Air Conditioners have a 5 year guarantee.

Air conditioners not under guarantee

Dear #name#,

After making three attempts to contact you via phone, we are now notifying in writing that your Air conditioner is due for service.

Kindly note that if you choose not to do the service may we remind you that it might cause major damage to the whole system.

Kindly contact us at your earliest to make an appointment on 21 482 166 or by email on isd@melita.com.

Regards

Customer Care

International Sales Direct

Product Management

The product management will allow the user to add and delete products to the application, and configure their service interval. For each service interval, the service name and the service interval in months has to be added. Each product can have one or more service intervals. All the mechanisms of the default products will be applied to the new ones. Also, each added product must be assigned a unique code which identifies it from the rest.

Installation

The application will have an easy installation setup for fast and user-friendly setup on PCs. The setup will install all needed applications and the database engine and database files needed.

Updates

Any form of updates and/or amendments that are needed, will be installed as patches to the original installation. Note that any needed updates and/or amendments will have to be quoted separately from iOCreations.

Backup

The software should allow the user to backup the database and restore it at a later stage if needed.