

# Solarvista™ LIVE/X9

Cloud Field Service Software & Mobile Apps

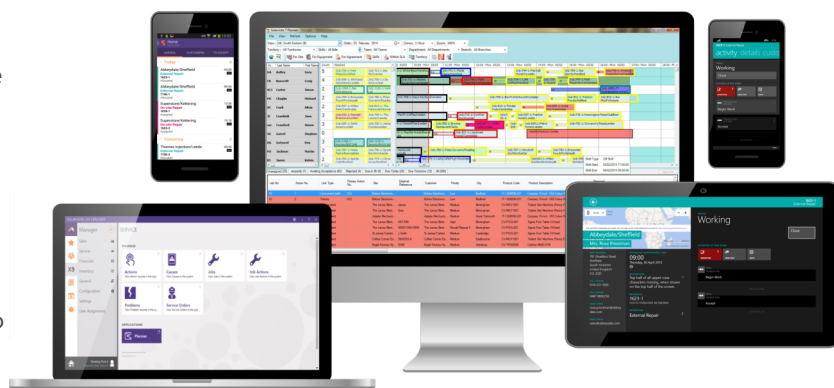


- ✓ Runs on every device type.
- ✓ Cloud software-as-a-service.
- ✓ Simple all-inclusive pricing.
- ✓ Editions to suit all budgets.

"I can relax now my business runs Solarvista™ in the cloud."

## Introducing Solarvista™ LIVE/X9

Solarvista™ LIVE/X9 is the ultimate in cloud-based software for field service operations. Whether you need a simple workforce management solution or an advanced full enterprise resource planning solution, we have an edition that's perfect for you. You can sign up and be live almost instantly. And it runs on almost every device... PCs, Macs, Android, iOS and Windows phones/tablets... all you need is a connection to the internet and to download/install a small app. We've made calculating costs super simple with a per user/per month price that includes everything... software, support, maintenance, cloud hosting... and you never need to buy a software upgrade again because we constantly upgrade the software for you. You can add users or upgrade to a higher level edition at any time meaning you can start small and grow big. **Sign up today for a free trial!**



		MOST POPULAR!		BEST VALUE!					
Essentials	Es	Group	Gr	Business	Bu				
<p>Customers &amp; contacts. Work orders &amp; jobs. Notes &amp; labour tracking. Diary planner with real-time status feedback. Mobile apps for Android, iOS, and Windows 8.1 or 10 phones &amp; tablets/laptops. Support by portal/forum. Remote training sessions. Access to video training library.</p> <p>Check solarvista.com for latest offers!</p> <p><b>£29</b> per <b>desktop</b> user/month*</p> <p><b>£15</b> per <b>mobile</b> user/month*</p>		<p><b>ALL THE FEATURES OF ESSENTIALS PLUS:</b></p> <p>Assets/equipment on sites. Telephone call tracking. Expenses with part numbers. Skills for personnel. Job costing and charges. Document printing. Support by email.</p> <p><b>£39</b> per <b>desktop</b> user/month*</p> <p><b>£19</b> per <b>mobile</b> user/month*</p>		<p><b>ALL THE FEATURES OF GROUP PLUS:</b></p> <p>Customer accounts. Break/fix features. Routine services/checklists. Document attachments. Parts &amp; inventory management. Territories for personnel. Computed travel time &amp; mapping. Purchase ordering. Agreements/contracts. Automated billing &amp; export. Customisation features. Direct support by telephone.</p> <p><b>£59</b> per <b>desktop</b> user/month*</p> <p><b>£29</b> per <b>mobile</b> user/month*</p>		<p><b>ALL THE FEATURES OF BUSINESS PLUS:</b></p> <p>Automated scheduling. Advanced inventory &amp; parts management. Advanced agreement/contracts. Secondary work. Repair centre mode. Multi-currency support. Dynamic integration adapters. Improved data categorisation. Geo-replicated databases. Guaranteed 1-hour response for support.</p> <p><b>£99</b> per <b>desktop</b> user/month*</p> <p><b>£39</b> per <b>mobile</b> user/month*</p>		<p><b>ALL THE FEATURES OF ENTERPRISE PLUS:</b></p> <p>Isolated, single tenancy. E-forms designer for mobile apps. Sales opportunities &amp; quotations. OData feed for BI/MI tools. Integration tools. Developer API access. Unlimited implementation advisory service. Testing account/sandbox. SaaS Assurance.</p> <p><b>£149</b> per <b>desktop</b> user/month*</p> <p><b>£42</b> per <b>mobile</b> user/month*</p>	
WORKFORCE MANAGEMENT			SERVICE MANAGEMENT/ERP SYSTEMS						

\*Billed annually with 12-month minimum contract duration (excludes free trial period). Subject to minimum user count. Call for volume discounts. Check for offers at [www.solarvista.com/pricing](http://www.solarvista.com/pricing). Monthly payment options available on Es, Gr & Bu editions. Some features not available at time of printing; please check prior to purchase by checking the Editions Feature Comparison document.



## BENEFITS AT A GLANCE

- ✓ You **don't need to buy** any hardware or software.
- ✓ It's **secure** as it's operating in Microsoft Cloud data centres.
- ✓ From simple workforce management through to advanced ERP... just select the **right edition** for you.
- ✓ Super **simple pricing** means it's easy to budget and calculate costs.
- ✓ It **runs on everything**... PCs, Macs, Android, iOS and Windows Phone.
- ✓ Feels **just like normal** software so less 'clunky' than web browser-based applications.
- ✓ All our mobile apps **operate offline** as well as online... we support **all device types** too.
- ✓ **Start small and grow as big** as you need... you can add users at anytime or upgrade editions for more features.
- ✓ You **never need to buy** a software upgrade again.

## FREQUENTLY ASKED QUESTIONS

### What's different about Solarvista LIVE/X9?

There many cloud based business applications that deliver field service operational control. However, many of these are quite new and not very rich in features. Solarvista LIVE/X9 is different because it is a derivative of the proven Solarvista 8 solution that is used by some of the largest organisations already. In short, you can get the advanced software that used to be available only to large organisations for a fraction of the cost.

### Can I start with a free trial?

Yes. These are for 15 days in the case of Essentials and Group editions and 30 days for Business. Trials for Enterprise and Ultimate editions are arranged specifically by contacting us.

### What happens when my free trial ends?

We'll give you an option to become a full subscriber. This is done by selecting your desired edition and quantity of users, entering payment details and we'll do the rest. If you do not want to continue, we'll simply delete any data you entered and close the account.

### What do I need to be able to run the apps?

Our apps are known as either *Desktop* apps or *Mobile* apps. The Desktop apps run via a free downloadable app from Microsoft called Microsoft® Azure RemoteApp and it runs on PCs, Macs, Android, iPhones, iPads and Windows 8 or 10 phones/tablets. Of course Solarvista LIVE/X9 is cloud based so you need a good connection to the internet. Our Mobile apps are designed for field-based users and operate offline as well as online. Apps are available for all major device types and distributed free via the respective app stores for iOS, Android and Windows. You can try the mobile apps without any signup; just tap Demo Mode from the first sign in screen.

### How do we learn how to use the apps?

Firstly, all subscribers get unlimited access to our library of training video tutorials. But we go further than that; we also provide 1-2-1 training sessions via web-based screen sharing tools. These are free and included as part of your subscription.

### What's included in the subscription fee?

We set out to provide 'super simple' pricing so we included just about everything in the 'per user price'. This includes software, support, cloud hosting, maintenance, backups, training and all future upgrades.

### Can I really start small and grow big?

Yes, in fact we recommend it. Why? You can start with a small, simple solution such as the Essentials edition and then when your business has grown, move to the next level or any of the others. You are getting to use software that really does run some of the largest and most advanced service companies in the world.

### How do I know I can rely on the service?

We have been supplying business critical software for over 25 years so we know how important field service related systems are. But even we cannot offer the world-class performance and experience needed to run cloud data centres, hence why we selected Microsoft® Azure.

### How do I sign up and pay?

We have a Master Subscription Agreement ("MSA") which defines the service we provide and our obligations to you (and vice versa). It's not too long or onerous but an important document. You can sign up online and provide payment details at the same time. It takes approximately 24 hours for us to get you live from first registration.

### How can I import existing data?

You can use standard tools to import data from CSV format. If you require custom imports, we can do this for an additional charge.

### Can my field employees use any mobile device?

Yes, we have mobile apps for iOS, Android and Windows that are functionally identical to each other.

### How do I select the right edition for my business?

The Editions section overleaf gives a high level outline of features, but for more detail, please refer to the detailed Editions Comparison Matrix document++. This enables you to compare features from one edition to another. Remember, you can always upgrade later if you need features in an upper level edition.

### How do I connect my existing systems?

Our *Solarvista NET* technology enables us to connect Solarvista LIVE Mobile to virtually any system because our connection tools support the major communication protocols. It's designed to connect on-premise systems (private) to systems in the cloud (public) and as such you can sure your data is secure.

**++ If you are reading this as a PDF it may be part of this document. If not, please visit [www.solarvista.com](http://www.solarvista.com) and download the latest version as a PDF file.**

## Why choose Solarvista?



At Solarvista, we've been building software for companies and organisations with a mobile workforce for over **25 years**. We have implemented solutions for **thousands of users** in almost every type of industry. We have a **proven capability** to deliver both out-of-box or customised solutions. Whatever your needs, it's highly likely that we have a solution for you.

## How does Software-as-a-Service work?



Traditionally, software was sold in boxes that contained disks or CDs. You paid for this software via a one off upfront payment. Then when the product was improved and another version was released, you would need to buy an upgrade. You might also be paying for parts of the software that you actually didn't need. Furthermore, you also needed to buy and maintain the hardware that the software was physically installed on. Solarvista LIVE is "software-as-a-service" and this means you only pay for what you need, as and when you need it. And you don't need to provision servers and operating systems (all you need for Solarvista LIVE are client or mobile devices). We keep the software updated automatically. We operate the servers in the cloud. And we offer full help desk support too.

## How secure is my data?



Solarvista LIVE has been designed from the very beginning to offer the highest levels of security. It's also been designed to be 'corporate friendly'. It also runs entirely within Microsoft Azure cloud data centres. These are certified to the highest industry standards including ISO27001.

We use what is called *claims-based, federated security*. This means that you can control individual user access through identity services provided by Microsoft Azure or Microsoft Account. We also offer an option that means all your systems and data reside in a single, isolated tenancy with Microsoft's cloud.

All data transmitted to and from Solarvista LIVE is encrypted using SSL ("Secure Sockets Layer") which means that data cannot be read by any other party. This is the same encryption used by online shops, banks and payment services. Your business data is also encrypted at rest within the data centres.

## CONTACT US

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## ABOUT SOLARVISTA<sup>TM</sup>

Solarvista<sup>TM</sup> specialises in developing Service Management software incorporating ERP, CRM, Mobile, Scheduling, Communications and Web applications that are integrated in real-time with legacy systems for organisations that market, sell, service and support. Established for over 25 years, our products are used by companies of various sizes, in various industry sectors, in many countries.

Google Play is a trademark of Google Inc. Apple and the Apple logo are trademarks of Apple Inc., registered in the U.S. and other countries. App Store is a service mark of Apple Inc. Microsoft is a trademark of the Microsoft group of companies. Microsoft, Windows and Windows Store are trademarks of the Microsoft group of companies.

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## EDITIONS FEATURE COMPARISON

### SELECT THE RIGHT EDITION FOR YOU...

#### MINIMUM USER COUNTS

Minimum users - desktop<sup>18</sup>

Minimum users - mobile<sup>18</sup>

#### Your desktop/office users can...

##### ACCESS

Access the desktop apps via Windows, Mac, Android and iOS devices.<sup>3</sup>

##### CUSTOMERS & ACCOUNTS

Keep a customer database including contact info.

Maintain a list of sites for each customer.

Add financial account information such as credit limit/status/terms for each customer.

Add heirarchical categorisation of customer & contact base.

Differentiate business and residential customers & contacts.

Operate a double secured, encrypted data area for each customer.

Classify contacts by job titles & edit titling defaults.

##### CRM

Add notes to customer files.

Track telephone calls/notes to customer files.

Send emails from within application.

Print letters from within application.<sup>4</sup>

Send SMS texts from within application.

Attach media and files to all available record types.

Validate addresses using postcode lookup.

##### WORK/SERVICE ORDERS

Create work/service orders.

Assign work/actions to field/mobile employees.

Create work/service order from find tool.

Use a streamlined, quick work/service order/job creation tool.

Create secondary work items (small tasks in addition to main job) for service orders.

Use repair centre mode to enable work/service orders to be used in repair depots.

Use help desk mode to enable work/service orders to be used in telephone support scenarios.

Assign work to teams, as opposed to individuals.

#### KEY

✓ included in standard subscription fee

⊗ not available at present time but will be included without additional charge as a future feature

○ available as an option with additional charges

Es Gr Bu En Ul

1 3 5 5 20

5 5 10 15 50

✓ ✓ ✓ ✓ ✓

✓ ✓ ✓ ✓ ✓

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## SELECT THE RIGHT EDITION FOR YOU...

Your **desktop/office** users can (continued)...

### LABOUR/PARTS

	Es	Gr	Bu	En	Ul
Capture labour times and add notes.	✓	✓	✓	✓	✓
Capture out-of-pocket expenses and associate with jobs.		✓	✓	✓	✓
Track telephone calls/notes to work/service orders and record time associated with call.		✓	✓	✓	✓
Use parts and process inventory transactions simultaneously.			✓	✓	✓
Categorise time across all activities.			✓	✓	✓
Exchange parts and process inventory transactions simultaneously.				⊗	⊗
Capture break periods and waiting time where applicable.				✓	✓
Capture bench work as a separate entity incl. labour & parts.				✓	✓

### PLANNING & SCHEDULING

Schedule work using an advanced Gantt-style diary.	✓	✓	✓	✓	✓
Assign skills to personnel to help with planning decisions.		✓	✓	✓	✓
Assign personnel to territories or customers to assist with planning decisions.			✓	✓	✓
Create custom views in the planning Gantt-style diary.			✓	✓	✓
Display location of job/site/personnel on Microsoft Bing maps.			✓	✓	✓
Compute travel time automatically. <sup>6</sup>			✓	✓	✓
In a single click, use an automated scheduler to determine least cost resource. <sup>5</sup>				✓	✓
Use appointment booking dialogs to enable convenient appointments for customers.				✓	✓
Setup qualifications for each person and use for scheduling decisions.				✓	✓
Add manual pre-requisite skills for each job to improve scheduling decisions.				✓	✓
Create a file of company holidays for use with planning decisions.				✓	✓
Enable customer/site specific opening hours for use with planning decisions.				✓	✓
Identify jobs in jeopardy and list within Gantt-style planning tool.				✓	✓
Create shift patterns which are used for planning purposes.				✓	✓
Be alerted to jobs in jeopardy. <sup>7</sup>				✓	✓
Set capacity management rules to protect resource availability at specific times.				✓	✓
Link actions/jobs together to force concurrent or sequential scheduling.				✓	✓

### SERVICE LEVELS/SLA

Setup service level entitlements that are applied automatically.			✓	✓	✓
Have manual priority selection on a job drive an SLA escalation.				✓	✓
Suspend and resume SLA tracking on work/service order/jobs.				✓	✓
Cancel and reinstate SLA tracking on work/service order/jobs.				✓	✓
Record a reason why an SLA may be adjusted from the norm.				✓	✓
Time-dependant SLA definitions for field service.				✓	✓

### MOBILE INTERACTION

Automatically transmit work orders/jobs to field/mobile users.	✓	✓	✓	✓	✓
Track status of work/service orders in real-time from planning Gantt (or work/service order record).	✓	✓	✓	✓	✓
Send messages to field-based staff from within Gantt-style planning tool.	⊗	⊗	⊗	⊗	⊗
(for more detail about mobile app functions refer to later section below)					

### EQUIPMENT & ASSETS

Maintain a list of assets/equipment for your customers and sites.		✓	✓	✓	✓
Operate a second heirarchical module level.				⊗	⊗
Track equipment/asset collections, loans, supply etc.				✓	✓

### BREAK/FIX

Use problem codes relevant to equipment types to record a fault.		✓	✓	✓	✓
Setup a list of cause codes to categorise break/fix scenarios.		✓	✓	✓	✓
Setup a list of resolution codes to categorise work done that resolves issues/faults.			✓	✓	✓
Operate vetting scripts to enable avoidance of break/fix scenario.			✓	✓	✓

### PRODUCTS

Setup product codes for parts, consumables, materials or equipment.		✓	✓	✓	✓
Setup heirarchical codes for manufacturers & models.			✓	✓	✓
Setup heirarchical codes for product groups and sub-categories.			✓	✓	✓
Set products to be applicable for specific classes of equipment.			✓	✓	✓
Create alternative products for each product.				✓	✓

### KEY

- ✓ included in standard subscription fee
- ⊗ not available at present time but will be included without additional charge as a future feature
- available as an option with additional charges

continued...



## SELECT THE RIGHT EDITION FOR YOU...

Your **desktop/office** users can (continued)...

### INVENTORY

	Es	Gr	Bu	En	Ul
Track quantities of parts/materials in various locations.			✓	✓	✓
Track serialised and non-serialised inventory.			✓	✓	✓
Process requests from staff for parts/materials to be sent to them.			✓	✓	✓
Register inventory via a goods inwards process linked to purchase order.			✓	✓	✓
Move inventory at any time from one location to another.			✓	✓	✓
Fulfill sales orders with inventory using a sales despatch note [requires Sales option to operate].			✓	✓	✓
Manually adjust values and quantities of any product.			✓	✓	✓
Determine shipping/collection points for field-based pickup.				✓	✓
Allocate parts/materials to work/service orders.				✓	✓
Setup shipping/carriage methods for purchase or sales.				✓	✓
Setup inventory re-ordering levels by location.				✓	✓
Define preferred warehouses and bins for specific products.				✓	✓
Operate an inventory audit.				✓	✓
Use inventory routings to pre-determine routes for logistical movements.				✓	✓

### PURCHASING

Create supplier records together with contact information.			✓	✓	✓
Generate purchase orders.			✓	✓	✓
Use templates to predefine purchase orders.				✓	✓
Setup preferred suppliers for specific products.				✓	✓
Record purchase invoices for matching against goods received.				✓	✓
Process purchase & return credits.				✓	✓
Record and track disputed purchase invoices.				✓	✓

### AGREEMENTS/CONTRACTS

Setup basic agreements/contracts to control entitlements and SLA.			✓	✓	✓
Operate a cancel or change process that records and adjusts automatically.			✓	✓	✓
Edit agreement status, categories, duration options, payment interval options.			✓	✓	✓
Compute total charges from individual charges by equipment/assets listed.				✓	✓
Change payment day and adjust schedules.				✓	✓
Renew using a proposal tied to the detail of the current agreement but with changes.				✓	✓
Renew using templates to pre-define pricing and profile.				✓	✓
Operate automatic mid-term SLA changes.				✓	✓
Exclude holidays from specific agreements.				✓	✓
Set limits to volume of work provided under an agreement.				✓	✓
Create/renew agreements from previously issued quotations.				✓	✓

### PROJECTS

Collect CRM and work/service order activities together under a project folder.				✓	✓
Create project templates to setup default work/service orders as a collection.				✓	✓

### BILLING/FINANCIAL

Setup costs of personnel to assist with profitability calculations.		✓	✓	✓	✓
Automatically calculate charges for work done when work/service orders close.		✓	✓	✓	✓
Setup policies for pricing of parts and materials, optionally by customer.			✓	✓	✓
Automatically generate invoices for chargeable work.			✓	✓	✓
Export CSV file of sales invoices ready for import into Sage 50 accounts.			✓	✓	✓
Import Sales Accounts CSV file for Sage 50 accounts software.			✓	✓	✓
Calculate billing for labour to exact minute even when labour starts in different tariff.			✓	✓	✓
Record deposits against a work/service order.				✓	✓
Discount product prices based upon quantity ordered.				✓	✓
Use multiple currencies for pricing and billing.				✓	✓
Record payment receipts against sales invoices.				✓	✓
Create 'applications for invoice' i.e. proforma batches in advance for approval.					✓
Issue and record vouchers as entitlement and/or payments.					✓

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continued...

## SELECT THE RIGHT EDITION FOR YOU...

Your **desktop/office** users can (continued)...

### ROUTINE SERVICES & CHECKLISTS

	Es	Gr	Bu	En	Ul
Specify standard service routines as task lists.		✓	✓	✓	✓
Specify complex service routines that enable flow control and result sets.			✓	✓	✓
Create scheduled work and later automatically generate work/service orders. <sup>8</sup>			✓	✓	✓
Specify inventory required for specific service routines.			✓	✓	✓
Specify pricing for standard service routines.				✓	✓
Create scheduled service profiles for specific products/equipment.				✓	✓
Maintain checklists for personnel prior to/following visiting sites or regular intervals.				✓	✓
Use bulk creation tool for creating planned maintenance scheduled services.				✓	✓

### ALERTS & NOTIFICATIONS

Set follow-up actions that alert you to something in the future.		☑	☑	☑	☑
Set notices on customer, equipment that show up automatically when activity occurs.			✓	✓	✓
Automatically send emails when a work/service order is created or closed.			☑	☑	☑
Automatically send SMS when a work/service order is assigned/updated.			○	○	○

### SALES

Track opportunities with customers and prospects.			○	○	✓
Create quotations for products and services.			○	○	✓
Create sales orders for products & services including insertion from quotations.			○	○	✓

### BI/ANALYTICS

Access an ODATA feed to facilitate business insight using modern tools. <sup>11</sup>			○	○	☑
Use a Microsoft Power BI Content Pack to access key performance indicators (requires ODATA feed).			☑	☑	☑

### STORAGE

Use up to 50Gb of personal file cloud storage for each user. <sup>12</sup>	✓	✓	✓	✓	✓
Use up to 100Gb of database storage for all users combined. <sup>13</sup>	✓	✓	✓	✓	✓

### CUSTOMISATION

Print documents/reports including editing of definitions/layouts.		✓	✓	✓	✓
Editing of print definitions/layouts.		☑	☑	☑	☑
Set your own document numbering formats.			✓	✓	✓
Customise columns of data views.			✓	✓	✓
Add user-defined data fields to all available records or documents.			☑	☑	☑
Customise customer short name formats.				✓	✓

Your **field/mobile** users can...



### ACCESS

Use an Android, iOS or Windows 8.1/10 smartphone. <sup>9</sup>	✓	✓	✓	✓	✓
Use a Windows Universal app for Windows RT/8.1/10 tablets/laptops.	✓	✓	✓	✓	✓
Keep working even outside network coverage because apps work offline.	✓	✓	✓	✓	✓

### GENERAL

Personalise the colours used for each type of work (and for each organisation served).	✓	✓	✓	✓	✓
Set preferred refresh rate and allow filter of work by date.	✓	✓	✓	✓	✓
Receive and update work from multiple organisations and merge into one list.	✓	✓	✓	✓	✓

### WORKFLOW & STATUS

Update status according to pre-defined workflows for each type of work.	✓	✓	✓	✓	✓
Define which activities are available or mandatory at each stage within each workflow.			✓	✓	✓
Instigate an "unable to access" process when access to site is denied/unavailable.				✓	✓
Set a "fixed/service restored" status prior to job completion.				✓	✓

### LABOUR & TIME

Track their labour time as they work.	✓	✓	✓	✓	✓
Modify estimated time of arrival (ETA) and estimated time of completion (ETC).		✓	✓	✓	✓
Capture breaks and waiting time where applicable.				✓	✓
Record return travel labour if last job for shift/day.				✓	✓

### TRAVEL/TRACKING

Record geographic location from device GPS and upload to cloud storage for viewing centrally.			☑	☑	☑
Record an odometer reading at departure and arrival.				✓	✓

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continued...



## SELECT THE RIGHT EDITION FOR YOU...

Your **field/mobile** users can (continued)...

### NOTIFICATIONS

Jobs noted with "New" flag when work is received but has never been opened.

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✓

✓

✓

✓

✓

Jobs noted with "Updated" flag when data is changed that has already been read at least once.

✓

✓

✓

✓

✓

Receive messages/notifications from Solarvista Gantt-tool planning users.

☑

☑

☑

☑

☑

### SIGNATURES

Capture signatures from customers.

✓

✓

✓

✓

✓

### EXPENSES

Record expenses or non-inventory items (free text plus a value).

✓

✓

✓

✓

### ACTIVITIES

Record free-text notes (including voice recognition where device allows).

✓

✓

✓

✓

✓

Attach media and/or files to work orders/actions.

○

○

○

☑

☑

Use action codes to record work instead of free text.

✓

✓

✓

✓

Capture rejection reason when work cannot be done.

✓

✓

### PARTS/INVENTORY

Record parts/materials used for jobs from personal inventory.

✓

✓

✓

Place inventory requests for parts/materials.

✓

✓

✓

Search for parts within organisation.

✓

✓

✓

Collect parts/materials from a collection point.

✓

✓

Use pre-allocated parts or parts sent to site in advance & confirm status of remaining parts at job closure.

☑

☑

Move parts/materials to defined locations.

✓

✓

Perform 'live handover' of parts to another mobile user.

☑

### SLA

Record reason when SLA has been missed.

✓

✓

### CUSTOMERS

View historical information for customer.

☑

☑

☑

Edit customer & contacts details.

✓

✓

View notices from site, equipment or agreement.

✓

✓

### EQUIPMENT/ASSETS

View list of all equipment/assets on site.

✓

✓

✓

Edit equipment/asset details.

✓

✓

Follow an equipment/assets installation process.

✓

✓

Perform census process.

☑

### BREAK/FIX

Record cause codes for break/fix scenarios.

✓

✓

✓

✓

### ROUTINE SERVICES

Read standard service routines as task lists and record them as done/not done.

✓

✓

✓

✓

Use e-forms for complex/extended service routines.

☑

☑

☑

Update checklists prior to (or following) visiting sites or at a regular interval.

✓

✓

### FURTHER WORK

Create a further work item during open visit, for when job is incomplete.

✓

✓

✓

✓

✓

View a list of other jobs at site and allow selection.

☑

☑

☑

Get a list of least-cost based appointments and book further work.<sup>5</sup>

☑

☑

### E-FORMS

Update e-forms and send results back to central system for review.

○

○

○

☑

### LONE WORKER

Setup and operate a lone worker alarm (fail-safe mechanism alerting across all diary/Gantt users).

○

○

○

○

### USER-DEFINED DATA

Receive and view ad-hoc data from external systems, e.g. user-defined data from Solarvista.

○

○

○

○

### KEY

✓ included in standard subscription fee

☑ not available at present time but will be included without additional charge as a future feature

○ available as an option with additional charges

continued...



## SELECT THE RIGHT EDITION FOR YOU...

### Your customers can...

#### WORK ORDERS/SERVICE ORDERS

Login to a web portal to view work in progress.

Create work/job requests online.

### Your system administrators or IT staff can...

#### SECURITY

Control access using Microsoft Azure Active Directory accounts.<sup>10</sup>

Control access to specific functions and data by user roles.

Setup branches, depots & internal departments and relate specific data to them.

Operate data that is encrypted in the data centre whilst at rest.

Operate system in isolation within a single Microsoft Azure subscription (single tenancy, not multi-tenancy).<sup>28</sup>

#### INTEGRATION

Use a ready-made real-time interface to Sage 50/Sage 200/Opera/Exchequer.<sup>14</sup>

Integrate with local systems using configurable Service Bus and Dynamic adapters supporting various protocols.<sup>15</sup>

Use a REST-based web API to develop applications that use core features.<sup>16</sup>

#### CUSTOMISATION

Edit mobile job workflows using web-based design tool.<sup>17</sup>

Design new mobile e-forms using a web-based design tool.<sup>17</sup>

#### DATA UPLOAD/ACCESS

Obtain data for reporting through an OData feed.

Upload data via standard CSV text formats.<sup>19</sup>

#### TESTING

Use a sandbox for testing and trials.

#### BACKUP & DISASTER RECOVERY

Be assured with backed up databases performed within data centre & 14-day point in time restore.

Be assured with replicated databases across multiple geographically different data centres & 14-day point in time restore.<sup>20</sup>

### We support you with...

#### FREE TRIAL

Access to free trial account with 1 desktop user and 3 mobile users for 15 days.

Access to free trial account with 3 desktop users and 3 mobile users for 30 days.<sup>27</sup>

#### TRAINING

Unlimited access to online video tutorial library.

Topic based training sessions via screen sharing/web meetings upon request.<sup>21</sup>

#### IMPLEMENTATION

Implementation advisory services.

Advanced customisation via add-ins/extensibility.<sup>26</sup>

#### SUPPORT

Access to support forum/web chat.

Response via direct email.

Telephone support direct to/from help desk.

Dedicated Customer Success Manager.

Guaranteed one-hour response time for support via direct contact.

24-hour/7-day week critical failure support response.

#### BILLING & LEGAL

Online signup and master subscription agreement ("MSA").

SaaS Assurance by NCC.

Non-standard Master Subscription Agreement terms by mutual agreement.

Payment via debit/credit card.

Payment via cheque/direct transfer.

Monthly payment plan.<sup>23</sup>

#### KEY

- ✔ included in standard subscription fee
- ⊗ not available at present time but will be included without additional charge as a future feature
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continued...



## PRICING FOR ADDITIONAL OPTIONS

### PER DESKTOP USER (PER MONTH)

		Es	Gr	Bu	En	Ul
Sales	Features for Sales team operations (Opportunities/Quotations etc.) in desktop apps.			£17	£17	incl.
Customer Web	Ability for customers to register & track work orders by web browser.			£16	£16	incl.
SaaS Assurance	Subscription to central SaaS Assurance Agreement operated by NCC.				£8	incl.
Non-standard MSA <sup>22</sup>	Operate under a non-standard MSA subject to agreement.				£39	£25
Dynamic Adapter	Real-time interface tooling for connection to legacy systems via various protocols.			£15	incl.	incl.
Sage 50 Adapter <sup>25</sup>	Real-time interface to Sage 50 (note: standard product has file exports built in).			£12	£12	£9
Sage 200 Adapter (Basic) <sup>25</sup>	Real-time interface to Sage 200 (customers/products/currencies/suppliers/sales invoices).			£14	£14	£11
Sage 200 Adapter (Advanced) <sup>25</sup>	Real-time interface to Sage 200 (as basic plus purchasing and goods related transactions).			£20	£20*	£15
Exchequer Adapter <sup>25</sup>	Real-time interface to Exchequer (customers/products/currencies/suppliers/sales invoices).			£20	£20	£15
Pegasus Opera II/3 Adapter <sup>25</sup>	Real-time interface to Opera II/3 (customers/products/currencies/suppliers/sales invoices).			£20	£20	£15
OData Feed	Access to the data via an ODATA feed that can be used with BI tools/reporting tools.			£15	£15	incl.
Developer API (Desktop) <sup>24</sup>	Developer level access to REST-based API (applicable for Desktop subscribed users only).				£12	incl.
Address Validation	Validate addresses using postcode lookup.				tbh	tbh
Isolated Single Tenancy <sup>28</sup>	Operate system within single isolated Microsoft Azure subscription. * subject to a minimum £400/month charge				£20*	incl.

### PER MOBILE USER (PER MONTH)

E-Forms	Design and operate customised e-forms with mobile apps (per mobile user).		£9	£8	£6	incl.
Lone Worker	User can setup fail-safe lone worker alarm with alerts in Solarvista Planner tool.		£15	£12	£11	£9
Media & Files	Attach photos, videos and other files to jobs and upload to central cloud storage.	£3	£3	£3	incl.	incl.
User Defined Data	Retrieve data from external systems and present with job.		£3	£3	£2	£2
Developer API (Mobile)	Developer level access to REST-based mobile API (if using another mobile client).				incl.	incl.

### PER TRANSACTION

SMS Text Service	Facility to send SMS texts manually or automated.	8p	8p	8p	8p	8p
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### PER ACCOUNT

Monthly Payment Option	Pay by monthly instalments rather than one year in advance.	+15%	+15%	+15%		
Testing Sandbox	Second environment for testing (limited user counts, 3 x desktop, 3 x mobile).				£500	incl.
Excess Database Storage	An additional 100Gb database storage.				£250	£250

### PER EXTERNAL USER (PER MONTH)

Developer API (External) <sup>24</sup>	Developer level access to REST-based API (applicable for non-subscribed external users only).				£49	£49
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### KEY

- included in standard subscription fee
- ⊙ not available at present time but will be included without additional charge as a future feature
- available as an option with additional charges

continued...

## FAQ/NOTES

### 1. Is it possible to mix editions between desktop and mobile software/apps?

Mixing editions is possible, however, the Desktop users must be a higher edition than the Mobile users. In this case, an *Editions Service Level Upgrade Fee* is applicable which varies depending upon the combination. The reason for this is that we can only offer service levels at one grade for a particular account and therefore the highest level of service is applicable, but not actually covered by fees in lower editions, hence why an extra fee is applicable.

**2. What exactly is "SaaS Assurance"?** With Software-as-a-Service, all our customers run on what is effectively the same software, running on a platform in a data centre controlled and managed by us. In the event of Solarvista Software ceasing to exist, a third party organisation automatically takes over the running of the Solarvista LIVE platform, thus ensuring that the system continues to operate. This transition, is managed by the UK's foremost operator of such agreements, NCC plc, formerly the National Computing Centre.

**3. How do I actually run the desktop apps on any device?** The key to this is a technology from Microsoft® called Azure RemoteApp™. This means you download a small, free app that is produced by Microsoft® and use that to connect to the desktop apps (not the mobile apps; these are downloaded from the app stores). This is a proven technology from Microsoft® that's used in millions of companies. It doesn't run in a browser; this is an advantage because it let's the application 'feel' like a normal application running on your computer.

**4. What do you mean by templated letters?** Functions that render printed letters, (as well as purchase orders, despatch notes etc. require the use of a document rendering engine that we build into the application free of charge (edition specific). This allows very good flexibility in layout and design and allows you to customise these to your specific needs.

**5. How does the scheduler determine least cost?** The application uses a fixed range of parameters to enable selection of the candidates list and then the scheduler looks for the shortest travel time option.

**6. How do you compute travel time?** The travel time is pre-computed by us and stored in what we call our 'travel matrix' so that the application has instant results to make decisions with. It is adjusted for peak-time travel effects.

**7. How is 'Jeopardy' defined?** Jeopardy is defined by rules that you can set. For example, a job that has not been accepted by the mobile within a set timeframe, or simply a job that is approaching 'response time' and has not been 'departed to'. These are not defined out of box so some configuration is required.

**8. What are "Scheduled Services"?** These are records that define a work order/job to be created in the future, subject to a time definition, for example "Planned Maintenance". Once created, these can then be assigned and populated as required.

**9. Are the mobile apps true native apps designed for each device?** Yes, they are full apps that also operate offline, so the user experience is superior to that of HTML-style apps that run in mobile browsers.

**10. How do users sign in?** Users sign in with Microsoft Azure Active Directory user credentials that are issued by us (username and password). The domain is owned by Solarvista and is in the format `firstname.lastname@company.live.solarvista.com`.

**11. What is an ODATA feed?** This is a modern and common protocol that enables a multitude of tools to connect to and read data from the system.

**12. How do I know that 50Gb of personal storage is enough?** The primary location for all data is within the databases and not the personal storage area. The personal file cloud storage area is like a hard disk that can be used by individuals only. 50Gb is enough storage for all foreseeable purposes in our opinion. This limit is not extendable.

**13. How do I know that 100Gb of database storage is enough?** This is the maximum size of the database that you can use, without purchasing excess storage options. It is unlikely your database needs will grow larger than this, but if they do, it is possible to extend this with additional options.

**14. Do interfaces exchange all information?** No, only a sub-set of information is exchanged though this is usually the most pertinent data. If the interface needs additional data to be exchanged, it's often possible for us to build a custom interface using other tooling at additional charge.

**15. Are there additional costs for services required for customising adapters?** Our Dynamic Adapter is designed to be easy to use but additional labour time will be required to define data flows. This time is chargeable and can be estimated following an initial technical review.

**16. What is a REST API?** This is a web service/facility that would be used by developers to enable other systems or applications to be built that communicate directly with the system (REST is the latest and most popular type). It doesn't enable every function to be accessed, but it is growing day by day in scope.

**17. What level of technical capability is required to customise workflows and e-forms?** Our goal is to make customisation as easy as possible but realistically, the task requires a systems/technical level of knowledge.

**18. Why do you have minimum user levels?** For simplicity, we price nearly everything on a 'per user/per month basis'. This enables you to compute the cost of expansion easily too. There are however fixed base costs for computing power and services (CPUs, backup pipes, capacity, monitoring, manpower etc.) that means that it would not be financially viable for us to operate with low levels of users, which varies by edition.

**19. How can I upload/migrate data?** We can upload high volumes of data automatically using an interim standard called CSV Texts files. We'll send you base formats that you can open in Microsoft® Excel™. As long as your data matches the formats, it can be read in. Any data that does not match the format will be rejected however. We can also perform direct, custom migrations at extra charge.

**20. What does using geographically different data centres mean?** We replicate your databases across data centres that are hundreds of kilometres away from each other and not operationally dependent upon each other. So, in the unlikely event of one data centre being offline/down, we can switch over to another and a relatively short time and all data will be up to date.

**21. How does the included training work?** We provide topic-based training remotely via web sessions for the duration of your subscription and this serves to assist you and your users once they are operating a live solution successfully. It isn't training that is suitable for initial training of more complex solutions from Business edition and upwards. We recommend longer, more tailored training for these scenarios.

**22. Why does a non-standard Master Subscription Agreement cost more?** Unfortunately, legal contract term changes require lawyers. What's more, management and monitoring of our services need to be specific to a single account if there are changes to terms and conditions.

**23. Why do you charge extra for monthly payments?** We try to keep costs as low as possible so we can pass these on to our customers. For this reason, our default pricing is based around a single payment for 12 months, which is less costly to administer and collect than twelve separate payments.

**24. Why is the External User Developer API access more expensive than the Desktop User?** Because the desktop user is already paying a subscription, the API is in effect already mostly funded, and therefore the fee is reduced. An external user would not be paying any other subscription so the full cost of the services are chargeable.

**25. What are the key concerns around interfacing to other systems?** All systems are fundamentally different and therefore any interface is often a compromise. In our case, we have built interfaces that operate with a subset of information being transferred. They also operate to business logic that is generically useful, but may not be exactly what you need. If changes or additional logic is required, we can provide customised interfaces using our Dynamic Adapter technology.

**26. What do add-ins and extensibility do?** We can develop small additional customisations and add these into the system to provide custom features designed exactly to your needs.

**27. Are trials available for all editions?** We currently only offer free trials for Essentials, Group and Business editions. We can offer trials for Enterprise and Ultimate above editions by special arrangement. The reason for this is that these upper tier products are more complex by nature.

**28. What does an isolated single tenancy achieve?** Solarvista LIVE/X9 normally operates in what is called a "multi-tenant" arrangement. This means that each customer account operates within Solarvista's cloud environment using services that are shared between accounts. If you prefer to operate your system using non-shared services, in an environment that is not mixed with other accounts, then an isolated single tenancy option delivers this.

## CONTACT US

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## ABOUT SOLARVISTA™

Solarvista™ specialises in developing Service Management software incorporating ERP, CRM, Mobile, Scheduling, Communications and Web applications that are integrated in real-time with legacy systems for organisations that market, sell, service and support. Established for over 25 years, our products are used by companies of various sizes, in various industry sectors, in many countries.

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