



# CROSSFORM™

## Powerful Software for Maintenance & Facility Management

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*CrossForm™ is designed to help companies dispatch in-house technicians and independent contractors to various customer sites. With several modules available, CrossForm becomes an efficient call center with service dispatch, inventory, preventive maintenance, invoicing and remote access tailored to your needs.*

**CrossForm™ is conveniently capable. Many time saving features are built into the product. For example, caller profiles and a dispatching matrix are used to default almost all fields when taking an order. CrossForm is also updateable in real time via external interfaces such as an IVR, wireless PDA or WAP-enabled phone.**

**CrossForm is completely customizable by our expert staff. Because we built the software from scratch, we can customize CrossForm to any extent your operations may require.**

### **Easy to Learn and Use.**

Operators will immediately recognize the look and feel of CrossForm™, because it was developed on the familiar Microsoft Windows platform. Its ease of use is also due to Mainstream's depth of experience – since 1987 – in developing software, especially for service dispatch.

### **Improves Customer Service Management Instantly.**

What your customers want most is speed and accessibility. CrossForm provides a dramatic improvement in both because it gives the service representative instant access to account information.

### **Strength at the Center.**

At the center of CrossForm is Mainstream's exclusive dispatching matrix, a sophisticated tool that gives users more information faster. It is the matrix that handles the complex default values that allow an operator to see all the factors involved, such as service level agreements, when providing service as requested.

### **Connected Every Which Way.**

To its core capability – a fast response to a voiced request – CrossForm adds A-to-Z coverage of communications venues, including a web request option and dispatch notifications via fax, pagers, e-mail and PDAs.

### **Reduces Call Time Dramatically.**

CrossForm cuts as much as 80% off average call lengths. This powerful software package improves customer relationships, cuts call center costs and coordinates in-the-field response.

### **Designed Specifically For Maintenance.**

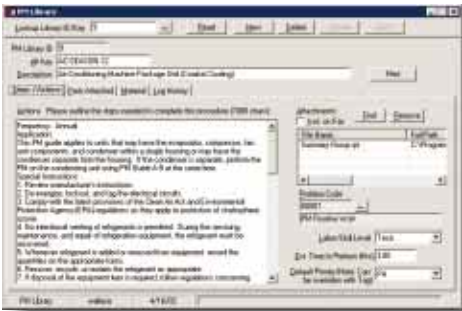
If you manage a service dispatch operation with inventory, assets, invoicing and remote access requirements, CrossForm was built for you. Got a ton of customer sites or work locations with in-house technicians and outside contractors? CrossForm is made to handle all of this – and more – with ease.



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CrossForm screens appear within familiar Windows screens. Log in once and all activity in the system is recorded against that login.



CrossForm lets you automate the schedule of preventive maintenance work orders, tying an order to a piece of equipment and attaching details like procedure instructions and specific PM material.

### Call Entry Features

- Flexible Customer Lookup
- CTI - Telephony Integration
- Call and Work Order History by Customer
- Tree View Categorization of Equipment and Problem Codes
- Integrated Expert Advisor
- Multiple Work Orders Per Call
- Automatic Assignment Notification
- Matrix Notes
- Assignment and SLA Defaulted From the Matrix

### Dispatch Board Features

- Drag-N-Drop Work Order Assigning
- Right-Click Context Sensitive Menu
- Multiple Dispatch Centers
- Print Out Work Orders

### Work Order Change Features

- Extensive Search Capabilities
- Sub orders in a Parent/Child Relationship
- Track Labor Hours Against Work Orders
- Track Material Used Against Work Orders
- Complete Log History of a Work Order

## The Call Center™.

*At the Heart of CrossForm™.*

Customer Service Representatives (CSRs) spend most of their time at the Call Center screens, where they can enter, track and close out work orders.

**Order Entry.** When a CSR takes a call, most fields are defaulted based on the caller profile and dispatching matrix, and historical orders are displayed to identify duplicates.

**Warranties Are Clearly Visible.** Equipment listings are listed graphically. Color codes flag the CSR to special needs and warranty status. Icons make it easy for the CSR to see whether the problem is covered under contract or is billable.

**Order Tracking.** Using the QuickList screen, custom or pre-built queries can be issued in an easy-to-manage environment.

CrossForm supports three Service Level Agreement targets and the QuickList shows which orders are approaching or exceeding those targets.

Every work order is accompanied by a chronology, so the CSR can see at a glance when it was created and by whom, when it was assigned, technician comments, etc.

**Order Completion.** CrossForm wraps up the order process, showing how the work was done and how much time and materials were required to fix the problem.



With a "Bulletin Board" on the Call Entry Form, supervisors can communicate important information to the Call Center instantly.

## Preventive Maintenance.

*Equipment is the Core.*

Equipment can be referenced throughout CrossForm via the integrated Inventory Tracking and Asset/PM modules.

**Inventory Tracking** is easier because

CrossForm supports serialized and non-serialized inventory across multiple warehouses. Optional bar-code scanning speeds up receipts, reconciliation and returns.

Assemblies are also supported, and interactive inventory forecast for quoted projects.

**Serialized Equipment Records** are tracked to the customer site as orders are posted, becoming trackable assets. Service and PM orders are both linked to assets to provide ongoing maintenance records.

**Preventive Maintenance.** CrossForm makes implementing scheduled PM's easy. You can set a PM job to run daily, weekly, monthly or yearly. Set it once and CrossForm automatically issues cycles on that frequency. This feature can be used for any recurring order, not just PM.

## Modules Available.

CrossForm is extremely complete, and anything else you need can be custom-fitted to the existing modules:

- Call Center & Dispatching Follow-Up
- Tech Time Tracking
- AP/AR Invoice Entry (feed to accounting)
- Inventory/Equipment Tracking
- Purchase Orders
- Shipping/Receiving
- Preventive Maintenance
- Wireless Bar Code Scanning
- Messenger (faxing, paging, email)
- PDA – Mobile Usage
- Web Interfaces (customer, answering service, supervisor, supplier)
- Interactive Voice Response (order updating via the telephone)
- CTI Integration (screen pops)



As this flow chart illustrates, CrossForm™ organizes the entire process, from initial service request through problem resolution to billing. The elegance of CrossForm's relational database makes the process faster, more secure and much easier to use.

For tracking open work orders, the Quick List Form is tough to beat. With its heavily indexed, trigger-maintained open-order table, Quick List enables fast searches even as your database grows over the years.

Looking up customer information, which appears in several different fields, is easy.

Using tree views on the Call Entry Form, a CSR can easily select the equipment group and drill-down to a specific asset. Problem codes are filtered by equipment group.

### CrossForm's Call Center is a CSR's best friend.

From the Call Entry Form, a CSR has fast, easy access to all the other forms needed for entering, tracking and completing orders.

Multiple orders can be taken for one call without having to re-input the caller information or work location. No complicated screen switching!

The Dispatch Board Form is used to monitor open orders for shops or other collections techs. You can set colors by priority, drag and drop to reassign, and double-click to drill down.

Notifying assignments and others about an order is what the Dispatch Notify Form is all about. Several faxes, pages and emails can be sent via the Messenger Server for a single order. Need to notify three people when an environmental order is taken in Florida? No problem.

### Web Access Welcomes Customers, Speeds Orders.

Customers can request service directly via the internet on forms that are brief and friendly.

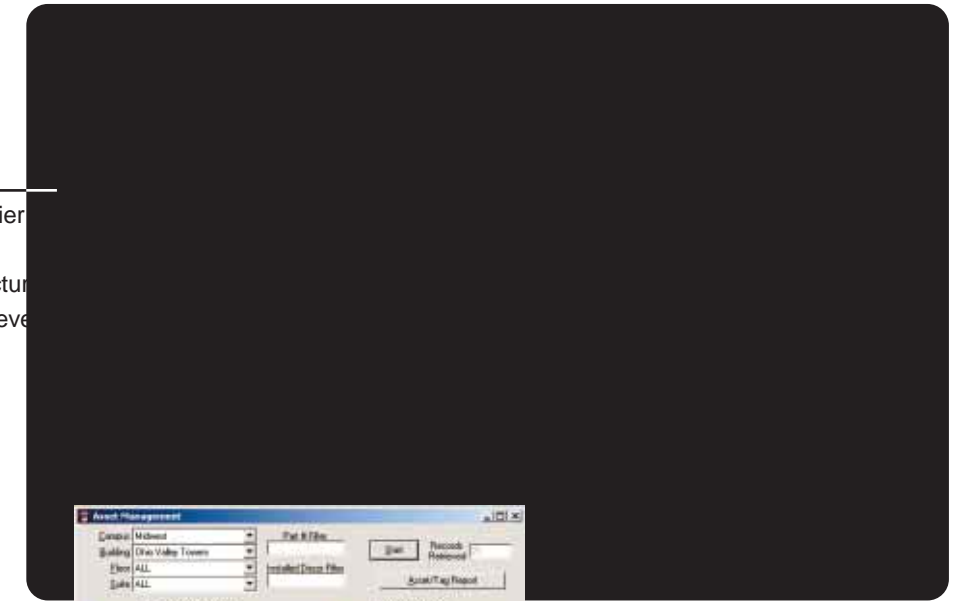


Managing the equipment catalog is much easier with this Equipment Hierarchy Explorer View. Users can see all or any part of the data structure and create or organize new elements at any level.

### Equipment/Preventive Maintenance.

Preventive maintenance, equipment and asset management screen interface with PM orders, purchase orders and serial tag maintenance.

All information about an asset is conveniently displayed on the Serial Tag form. You can view warranties, order history, movements and preventive maintenance coverage.



The Asset Management form allows for easy viewing and reporting on asset/equipment information. Simply select the location filter and click Start. Drag and drop to create a new asset, or right-click to view properties.

Use the PM Jobs form to schedule orders, and you can send an automatic fax to the assignment when orders are generated. This form schedules preventive maintenance, inspections or virtually any type of recurring order.

## Platform and Connectivity Options

In all of its several connectivity and enduser platform options, CrossForm™ provides real-time access to a Microsoft SQL Server® database.

### Traditional Client-Server

When installed in a traditional client-server configuration with Win32® computers, the CrossForm program executes directly on the client's LAN accessing a Microsoft SQL Server® database server form. Typically, this method is used in high-volume call centers for fast access and processing. Client requirements include Win NT® 4.0 SP6, Windows 2000® or Windows XP® with at least 64 MB of memory.

### Web Access

CrossForm has several targeted web sites available. One web site is specifically designed for 24 x 7 access by an external answering service, while another is designed for supplier/vendor interaction. The full CrossForm client program can also be accessed over a web browser by using Citrix®Nfuse™ or Microsoft Terminal Services® Call us for details.

**If the speed, accuracy and efficiency of CrossForm sound interesting, visit our website, call us or e-mail [sales@mainstreams.com](mailto:sales@mainstreams.com)**

**Our consultants will be pleased to discuss the extraordinary potential for quick return on investment that CrossForm offers. Or learn more about CrossForm at [www.mainstreams.com](http://www.mainstreams.com).**



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