



# ServerLogic Customer Case Study

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## ServicePortal – Commercial Building Maintenance Management Tool

### Overview

**Solution:** ServicePortal, Inc.

**Industry:** Commercial Cleaning

**Customer:** ServicePortal.com

### Customer Profile

ServicePortal is a company committed to providing a high-quality building maintenance management software package to the commercial building cleaning industry. The company was founded by veterans of both the software and cleaning industries bringing over 20+ years of relevant industry experience.

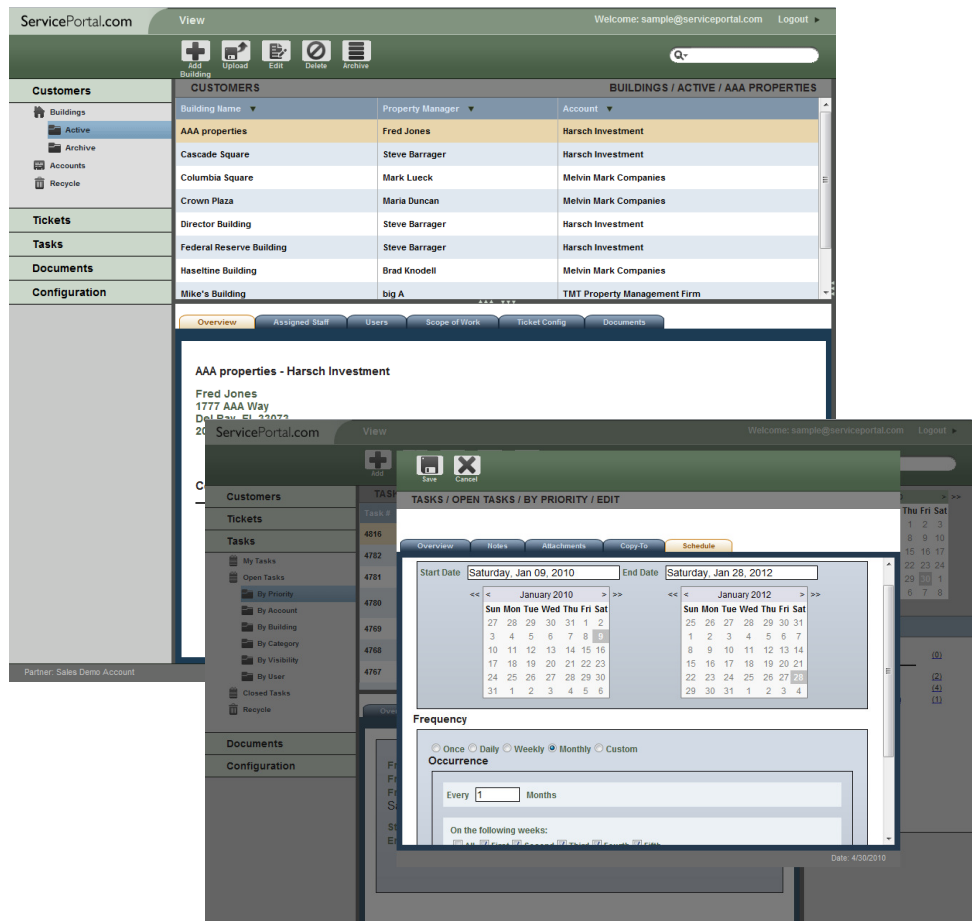
### Business Situation

Prior to ServicePortal, the commercial cleaning industry had been largely underserved by technology. ServicePortal promised to expose a smooth, web-based, desktop-like experience that would empower cleaning companies to improve their service offerings. Because technology has not played much of a role in the cleaning industry to date, ServicePortal needed a solution that would provide a broad array of features, with a minimum of technical experience

### Benefits

- Higher quality
- Increased productivity
- Lower cost
- Better communication
- Better customer service

**ServicePortal.com**



ServicePortal was looking to provide a new version of its web-based building maintenance management software. The current version was showing signs of age and did not have the management and maintenance features that would be needed to grow beyond a few customers. ServicePortal engaged ServerLogic's custom software development group to help them re-imagine their product and to perform a complete product rewrite, from the database up.

## Solution Overview

The focus was on usability; the solution was an organized, context-based, AJAX powered web portal. The web portal was divided into 3 major areas: The first area is the ServicePortal Administration Portal. Here, administrators can add new cleaning companies (referred to as partners) and manage the overall system.

The second major area is the Partner Portal. This is where ServicePortal partners can manage their customer information, such as buildings and contracts. The Partner Portal is also where service tickets and tasks are tracked and managed. This empowers ServicePortal partners to offer a high level of accountability to their customers.

Finally, the ServicePortal system has a Customer Portal. This is where partner customers can report tickets, and track their resolution. The customer portal also provides a photo library of assigned cleaning staff. This allows the customer to know who will be cleaning their building. Building security officers can use this photo library to determine whether someone is a member of the cleaning staff, and should be on-premise legitimately.

## Features

### Property Management

ServicePortal partners can maintain a list of the properties and service accounts they manage. For each property maintained, the Service Portal partner can assign cleaning staff and identify work duties. The Service Portal partner can also keep track of important property related documents such as invoices, contracts and inspection reports. If a particular property has specific tracking needs, the Service Portal partner can customize how tickets are tracked on a property by property basis.

### Document Sharing and Management

A core concept in the ServicePortal system is the idea of document management. Documents are related to buildings, tasks, tickets and customers. A ServicePortal partners and customers can create work items with document attachments. ServicePortal partners can keep documents related to the properties they manage, sharing some such documents directly with their ServicePortal customers.

### Task Scheduling

Work tasks can be scheduled to occur once, or on a recurring basis. The recurring schedule is very flexible. When a ServicePortal partner logs into the system, they are prompted with a list of all tasks to be completed that day. Tasks that are not completed on the scheduled day are rolled over to the next day, until they are completed.

### Ticket History and Notifications

A ticket will change over time as work is completed. With each ticket is a full log of the changes that have been made. As each change is made, an e-mail notification is sent out to any users who are associated with the ticket. If a ServicePortal partner or customer replies to one of these e-mail notifications, their comments will be added to the ticket.

### Dynamic Security

The security model for ServicePortal is dynamic and granular. Every button and screen in the system is related to an activity. These activities are tied to security privileges. Security privileges are managed and be grouped into permission groups. Users are then added to these permission groups. Each ServicePortal partner starts with a common set of permission groups that they can customize to fit the needs of their customers.

### Context Driven Interface

The ServicePortal interface is tied to the same granular object model that controls security. By creating a context driven interface, the user is assured a common interface between screens. Buttons always appear in the button bar, and are always relevant to the action being performed. If a button needs to be added or removed on a particular screen, this change can be made by modifying data in the database, as opposed to a coding change.

## Technical Platform

- .NET Framework 3.5
- C#.NET
- Microsoft SQL Server
- Ajax

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