

Do not let the classic look deceive you.
Magno Service Manager runs in Windows
10 and Windows 11.

Magno Service Manager

A CRM WITH A SERVICE PLAN!

► www.MagnoCRM.com

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About me

- ▶ Field service engineer since 1997.
- ▶ Started working with HPLC and all kinds of analytical instrumentation at age 20 in Advanced Instruments Sales and Services, now VWR Advanced Instruments in Puerto Rico, USA.
- ▶ An Army reserves soldier at the same time.
- ▶ Bachelor in Electronic Engineer Technology from the University of PR in Bayamon and another in Software Engineering from Phoenix University.
- ▶ **Honesty**, customer satisfaction, empathy, proficiency and the will to do more and go beyond, are my biggest goals.



About me

- ▶ Fernando J. Garcia
Delivering from: Texas
- ▶ Fernando@magnocrm.com
- ▶ Info@magnocrm.com

Software history and foundation

- ▶ A need for a better service report template arose at work. I created one using Microsoft Word. It was well received by all personnel.
- ▶ The need for electronic filing and archival was evident. Customers wanted readability and consistency. A PDF fillable version was created.
- ▶ It was obnoxious to be typing the same information from customer contacts records again and again, so I added the ability to import information from Outlook contacts with the click of a button.
- ▶ In June 2011, a MySQL database was created to store records and the Magno Service Manager project was started.

Software history and foundation

- ▶ *The fun began! I started developing Magno Service Manager. A solid CRM for the service of laboratory instruments.*
- ▶ *Customer, companies, entities, suppliers, manufacturers, models, instruments, systems, services and quotes are now safely stored in this database (now in MariaDB)*
- ▶ *Magno Service Manager can now take you from a customer service call to an electronically signed report including service polls and metrics in a day or two, without printing a single document and with all kind of information at the click of a button.*

The goal... is to:



- Provide you with a simple yet effective way to receive service requests.
- Create and complete services electronically in a modern fashion, that will provide you with centralization of all service-related data in a secure and easy to search way.
- Provide you with print-less processes.
- Be the source of all the needed information for both the office personnel and the people on the field.
- Provide the basic metrics for all personnel.
- Customizable metrics for the managers.

Software features

- ▶ Easy Installation and configuration for both server and client side.
 - ▶ A company using Magno as its sole system, should be up and running in little time!
- ▶ SQL compatible RDBMS (database), which give Magno Service Manager a realizable platform and an enormous ability to expand, automate backups, mirroring over multiple server for hundreds of thousand if not millions of records.
- ▶ Server can be Windows or Linux.
- ▶ Client runs in Windows (All versions, including Win 11).

The screenshot shows a window titled "Database Connection Settings" with a blue border. It is divided into sections for "Primary server" and "Secondary server".

Primary server (highlighted in green):

- 1: Import Key 1 (button)
- Key on file
- Host name or IP: 159.89.151.35
- Port: 7171
- Database name (Case sensitive): Magna_DB_Debug
- Key pass: [masked]

Enable secondary server

Secondary server (highlighted in red):

- 2: Import Key 2 (button)
- Key on file
- Host name or IP: [empty]
- Port: [empty]
- Database name (Case sensitive): [empty]
- Key pass: [empty]

SFTP private key (highlighted in green):

- Key stored locally

3: Import settings from a file (button)

Software features

Field Personnel Interface			
Function(s)	Available in Magno?		Notes
	Online	Offline	
Open a Service Call	Yes	Yes	As easy as a double-click
Close a Service Call	Yes	Yes	Magno called it `Complete` a service. `Close` is the final step after finance and all those back-offices tasks.
Enter parts on service from the service rep. parts location	Yes	Yes	As easy as to choose from your parts list.
View parts	Yes	Yes	Not only one can view your parts, but all other entities parts. It also lets you see used parts and in what service these parts were used.
Inventory Management order/transfer	Yes	No	Online only for those with the privilege. Customization is available.
View parts in all or selected inventories	Yes	Partial	Offline will display your inventory only.
View Equipment Service History	Yes	No	The goal of offline mode is to get the pertinent service done and get a signed report.
View Contract Status	Yes	No	Management of contracts is available online only.
Search Equipment by Customer	Yes	Yes	It is possible to search by companies, serial number and installation or by warranty expiration date.

Software features

Field Personnel Interface, cont.			
View All Assigned Service Calls	Yes	Yes	
Ability to schedule services	Yes	Yes	Expected and coordinated dates are both available.
Generate a service report	Yes	Yes	Also, sign the report electronically using a topaz or do auto-signature by uploading a picture of your picture to the server. Online and offline.
Manuals /documents	Yes	Yes	Instruction/Service/Site Prep./Test Proc. /Std. Certs. /MSDS and any other document for Models/Instrument/Companies/Contracts/Internal Entities. All these limited only, by the server capacities.
Barcode integration	Yes	Partial	This area will always need some adjustments as all barcodes are not the same.
Knowledge Base	No	No	I highly recommend using software specifically designed to be a Knowledge Base, the functionalities will be much more complete. I can then display HTML content from within Magno as needed. I always say, use a truck for off-road and a formula car for speed. However, if needed this can be implemented as it is basically a database of information related to instrument models and accessible via HTTP. However, a basic knowledge base can be design and implemented if this is what the customer want or need.
Team Collaboration	Yes	Yes	All services have a Responsible and an Assigned Person, this functionality allows participation on that service to both parties. Communication in relation to a service is easy.
Offline Capabilities	Yes		Sync time varies from 0.5 to 5 minutes depending on the number of services to sync. This is fast in comparison to many others. There is also a more details sync, for managers and dispatchers that allow to have not only the pertinent data relate to your assigned services but all records, allowing work on administrative tasks offline.
Social/Chat	No	No	Messages withing the system available, @Mentions in development for a true collaborative experience.

Software features

Office/Management Function			
Open a Call	Yes	Yes	Takes 30 to 60 seconds to create a service if the information is at hand.
Close a Call	Yes	Yes	
Enter Inventory	Yes	Yes	
Ability to review services before invoicing	Yes	Yes	
Service Call Metrics	Yes	No	
Engineer time utilization	Yes	Yes	
Create/Transfer/Renew Contracts	Yes	No	
Contract Renewal Reminders	Yes		This is done at server level. Every certain number of dates a list of email accounts will receive reminders of service contracts to expire and those that expired.
Automatic Contract letter to customers	Yes		This can be implemented very easily and will take a day to achieve. A letter will be needed.
Automatic quote for instruments going out of warranty.	Yes		In Magno warranty is a type of contract (covering labors and parts), so all the benefits of a contract are also applied to "Warranties".
Customer portal	Yes		Made custom per Magno Service Manager owner request.
Integration with existent CRM data			<p>There are many scenarios here:</p> <ol style="list-style-type: none"> 1. Re-entering data from scratch may sound ridiculous but some companies have such bad data that starting from scratch will greatly benefit them. 2. Passing certain years of data from current databases to Magno database and using Magno as design and from its own database alone is another way to go and can be achieved by creating a script to automate the process or use services like BD Sync or similar. Other options available as needed.

A peek to the main window

My Service Center - Fernando Garcia - Fri Feb 08, 2019

File Settings Database Tools Help

Search: All Services Show Closed, Completed and Canceled services. Go

Filter by dates with service creation date from: 25-Nov-2018 to 08-Feb-2019

Service Number	Service Type	Call Status	Contract Type	Associated Contract ID	P.O. Number	Contract Visit Number	Instrument Location	Location Coordinates	Customer Name	Customer E-Mail	Customer Tel./Cell	Is Multi Instruments	Expected Service Date	Coordinated Service Date
9001699	IQOQ	Completed	On Warranty	569	12345676543	N/A	Acme Industries - Elk Grove Village, IL	41.9970975,-87.9663529	Michael Smith	xistemasplanb@gmail.com	666-444-3333 / 444-555-6666	<input type="checkbox"/>	21 Dec 2018	30 Dec 2018
9001700	Training	Completed	No Contract	No Contract	PO3456784	N/A	Company ABCD - Grand Prairie, TX	32.7474023,-96.9772104	Joe Putak	nandostyle@gmail.com	469-555-8890 / 469-555-8889	<input type="checkbox"/>	27 Dec 2018	28 Dec 2018
9001701	Repair	Assigned	No Contract	No Contract	PO345328	N/A	Acme Industries - Elk Grove Village, IL	41.9970975,-87.9663529	Michael Smith	xistemasplanb@gmail.com	666-444-3333 / 444-555-6666	<input type="checkbox"/>	03 Jan 2019	
9001703	Training	Completed	On Warranty	569	PO876543g3456	N/A	Acme Industries - Elk Grove Village, IL	41.9970975,-87.9663529	Michael Smith	xistemasplanb@gmail.com	666-444-3333 / 444-555-6666	<input type="checkbox"/>	07 Jan 2019	05 Jan 2019
9001704	Repair	Assigned	No Contract	No Contract	PO4568324	N/A	Acme Industries - Elk Grove Village, IL	41.9970975,-87.9663529	Michael Smith	xistemasplanb@gmail.com	666-444-3333 / 444-555-6666	<input type="checkbox"/>	07 Jan 2019	02 Jan 2019
9001705	Repair	Scheduled	No Contract	No Contract		N/A	Company ABCD - Grand Prairie, TX	32.7474023,-96.9772104	Joe Putak	nandostyle@gmail.com	469-555-8890 / 469-555-8889	<input type="checkbox"/>	03 Jan 2019	02 Jan 2019
9001706	Repair	Assigned	No Contract	No Contract		N/A	Acme Industries - Elk Grove Village, IL	41.9970975,-87.9663529	Michael Smith	xistemasplanb@gmail.com	666-444-3333 / 444-555-6666	<input type="checkbox"/>	07 Jan 2019	
9001707	Repair	Closed	No Contract	No Contract		N/A	Acme Industries - Elk Grove Village, IL	41.9970975,-87.9663529	Michael Smith	xistemasplanb@gmail.com	666-444-3333 / 444-555-6666	<input type="checkbox"/>	15 Jan 2019	06 Jan 2019

Refresh

Information Center

Parts and Standards

Add/Edit Information

Create/Edit Quotes

Create/Edit Service


Add/Edit Parts and Standards

Add/Edit Service Contracts

Disconnect

Sync

Model Information



Model: MS4002TS
 Manufacturer: [Mettler Toledo](#)
[Support WebSite](#) Obsolete
 Model Files

Description:
 This model is real and do exist, however it is lise here for demo only.

[Instruction Manual](#) [Service Manual](#)
[Testing Procedure](#) [Site Preparation Check List](#)

Ready

Count: 8

List of instruments/modules in the service call (System)

Model	Manufacturer	Serial Number	Contract Type	Installation Date	Warranty Expiration Date	Instrument Notes
MS4002TS	Mettler Toledo	237876543	On Warranty	20 Dec 2018	20 Dec 2019	For TestDrive Only!
U ionizer	Mettler Toledo	777555U	On Warranty	20 Dec 2018	20 Dec 2019	

Count: 2

Service history for the selected component

Service Number	Assigned to:	Responsible Entity:	Service Created On	Service Completed	Service Notes	Parts Total	Labor Hours	Driving Hours
9001699	Fernando Garcia	Fernando Garcia	16 Dec 2018 09:02:15 PM	31 Dec 2018	Reported Problem: Customer moving the instrument to a new laboratory. Solution: Instrument re-installed to the new location and was tested with good results. See certificate of performance attached.	0.00	5.5	1
9001703	Fernando Garcia	Fernando Garcia	24 Dec 2018 02:05:58 PM	07 Jan 2019	Customer requested formal and documented training of new personnel in the basic use and maintenance of the system.Resolution: Training given	0.00	6	1

Count: 2

Remember to sync. Connected to primary server. Last Sync: 08 Feb 2019 04:42:27 PM

A peek to the part and standards windows

My Service Center - John Bluemoon

File Settings Database Tools Help

Search: All my services (Responsible And Assigned) Show Closed, Completed and Canceled services.

Filter by dates with service creation date from: 25-Nov-2018 to 08-Feb-2019

Service Number	Service Type	Call Status	Contract Type	Associated Contract ID	P.O. Number	Contract Visit Number	Instrument Location	Location Coordinates	Customer Name	Customer E-Mail	Customer Tel/Cell	Is Multi Instruments	Expected Service Date	Coordinated Service Date																				
<div data-bbox="379 766 1418 1768"> <p>Parts and Standards</p> <p>Part Items Parts Standards</p> <p>Search: Parts Site containing (empty is all): FG <input type="button" value="Go"/></p> <p><input checked="" type="checkbox"/> Include used parts <input checked="" type="checkbox"/> Show re-orders only</p> <table border="1"> <thead> <tr> <th>Item ID</th> <th>Part Number</th> <th>Part Description</th> <th>Requisition Number</th> <th>List Price</th> </tr> </thead> <tbody> <tr> <td>5000007</td> <td>AC-Cab-01</td> <td>Power Cable NE...</td> <td></td> <td>15.00</td> </tr> <tr> <td>5000013</td> <td>AC-Cab-01</td> <td>Power Cable NE...</td> <td></td> <td>15.00</td> </tr> <tr> <td>5000020</td> <td>MT-CR232</td> <td>CR2320 Lithium ...</td> <td>87654321</td> <td>45.00</td> </tr> </tbody> </table> <p>Count: 3 <input type="button" value="Cancel Re-Order"/></p> <p>Part Items</p> <p>Part Item ID: 5000007 Requisition #: <input type="text"/></p> <p>Part Number: AC-Cab-01 Qty. Per Pkg: 1 <input type="checkbox"/> On Stock</p> <p><input type="checkbox"/> Part is Obsolete List Price: 15.00</p> <p>Part Description: Power Cable NEMA 5-15 with energy indicator. Item Serial Number: <input type="text"/></p> <p>Part Manufacturer: AC-Electronics China Part Exp. Date: <input type="text" value="08/Feb/YYYY"/></p> <p>Part Site - Owner: FG Special Handling Instructions: None</p> <p>Used On: 9001704</p> <p>Part MSDS <input type="checkbox"/> Special handle <input type="checkbox"/> Dangerous Goods Created On: 2018-12-15 21:14:15</p> <p>Notes: <input type="text"/></p> </div>															Item ID	Part Number	Part Description	Requisition Number	List Price	5000007	AC-Cab-01	Power Cable NE...		15.00	5000013	AC-Cab-01	Power Cable NE...		15.00	5000020	MT-CR232	CR2320 Lithium ...	87654321	45.00
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Item ID	Part Number	Part Description	Manufacturer	Item Serial Number																														
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5000010	AC-Cab-01	Power Cable NE...	AC-Electronics C...	9876543																														
5000008	MT-CR232	CR2320 Lithium ...																																

A peek to a new service call, email alert.

Service Number: 9001706

xistemasplanb@gmail.com
4:18 PM

fernando

Service Type: Repair
Model: MS4002TS Serial: 239864348
Service Notes: Instrument not powering on.

Contact info:
Customer Name: Michael Smith
Customer E-Mail: xistemasplanb@gmail.com
Company Name: Acme Industries
Company Tel: 777-777-8888
Customer Tel: 666-444-3333
Customer Cell: 444-555-6666

Address:
1325 Pratt Blvd Elk Grove Village, IL USA

Responsible Entity: Jataniel Smeir
Service Assigned to: Jataniel Smeir
Expected service date: 07 Jan 2019
Coordinated service date:
Call Status on: 2019-02-08 18:17:21 is: Assigned

For Waze:
<https://waze.com/ul?ll=41.9970975%2C-87.9663529>

For Google Maps:
<http://www.google.com/maps/place/41.9970975%2C-87.9663529>

For Apple Maps:
<http://maps.apple.com/?ll=41.9970975%2C-87.9663529>

Reply · Reply All · Forward · Edit as new

This can be customized.

Also, one can configure Magno Service Manager to send you a list of all your open services on desired days.

Service List Email Scheduler Settings

Send service list to my email as scheduled below:

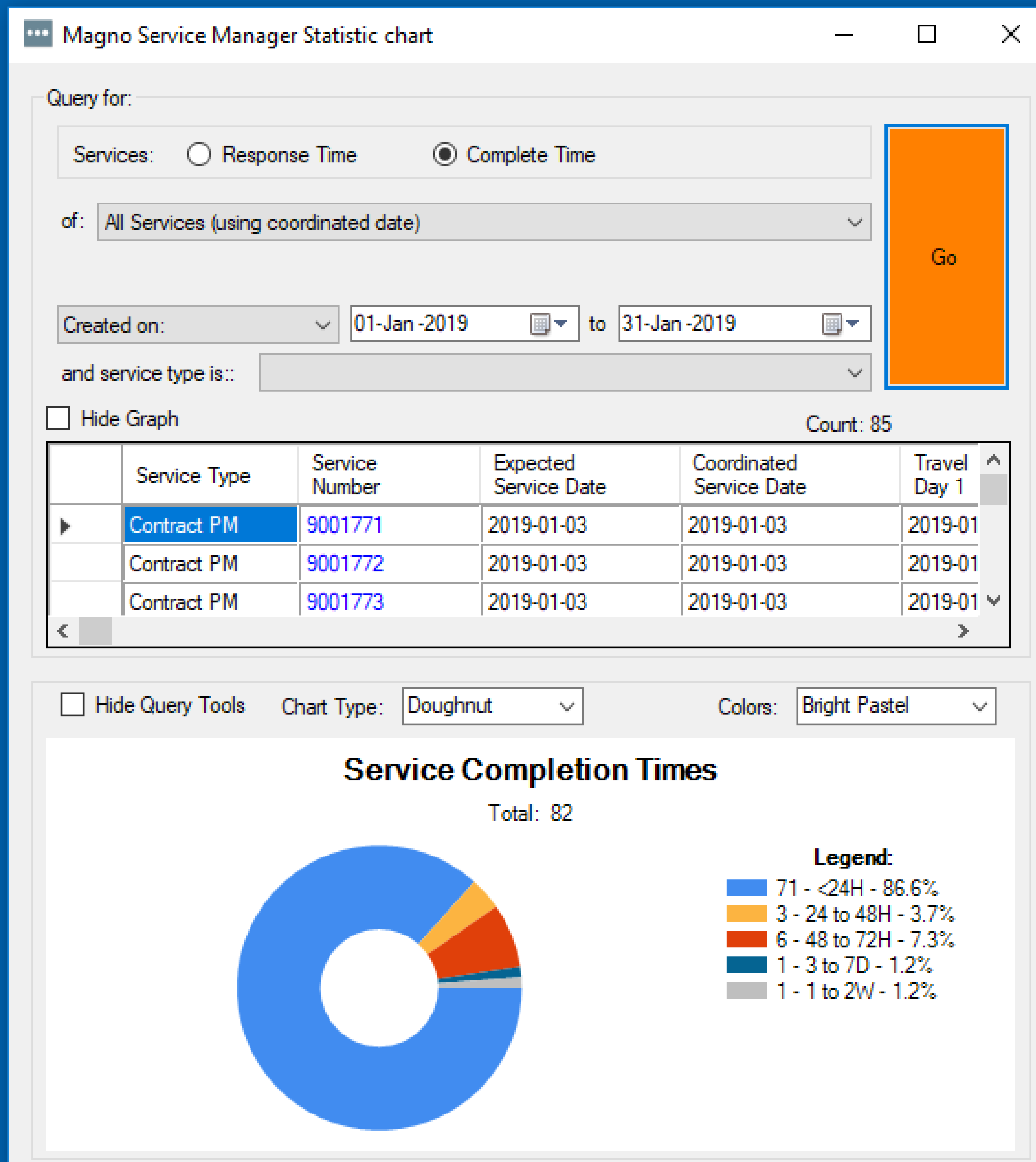
Scheduler Settings (at 2:00AM ServerTime)

Monday Thursday Sunday
 Tuesday Friday
 Wednesday Saturday

Also Send To:

Email Address 1:
Email Address 2:
Email Address 3:

Basic statistics



It is well known that service representative will correct themselves and will work toward improvements, if their mistakes and achievements are known to them in a timely manner.

In Magno, response and completion times are known by everybody in the team, promoting synergy.

What to consider when choosing?

- ▶ How, and by who is my data handled?
Magno data can be store in a local server, handle locally or in a cloud server that could be handled by local personnel (recommended) or manage by a third party for those companies without an IT personnel.
- ▶ Total cost – Must CRM charge by users, by month, by futures or a combination of these. With Mano Service Manger you will own the right to use all futures of it, as much as you need for as long as you can, if it is use within the company it was sold to. Simple is always better!
Critical updates will always be free!
- ▶ Is the CRM for analytical instrumentation? One does not want to end with fields that do not accommodate to your company and actual business. **Magno Service Manager is specially designed for Instrumentation Services.**

What to consider when choosing?

- ▶ Is customization available? By whom? In Magno Service Manager customizations are included with a onetime yearly fee (that may be paid on a monthly basis if needed). You may solicit any need for consideration and if solid and reasonable, I (The actual and original creator of the software) will implement it.
- ▶ Is training available? In Magno Service Manager, initial training is included for all office and service personnel. Sections length and quantities will depend on the scale of the company and their specific needs. Training is available in English and Spanish. Further training after the initial one is available for a small fee considering the task.
- ▶ Is the system friendly to use? Some CRM out there are a nightmare to configure and use. Magno Service Manage can be considered a super easy to use application.
- ▶ Reporting – Is reporting customizable? The answer should always be and is, YES!

What is next?

In the near future:

- ▶ The intention is to keep improving the current structure. Version 2 is being develop.
- ▶ Add an internal communication micro-blogging system with @Mention capabilities is being implemented.

Further ahead:

- ▶ Enter sales arena with Magno Sales Manager. Information gathering and structure creation is being work with.

Any Question?

Do not hesitate to contact me at info@MagnoCRM.com

[Fernando J. Garcia](#)