

Service Management

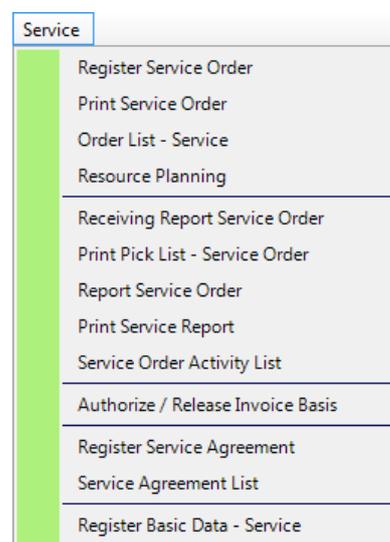
What Is Service Management?

A new supplement called "Service Management" has been developed for companies that perform service of their own products. The supplement is used to plan, save and report service engagements. By using this feature you can manage installation tasks and warranty commitments as well as urgent and planned machine service. The Service Management handles service engagements performed at the customer's location or at your own facilities. The service can be performed by your own personnel or by external suppliers/business partners. The time used for service and travel as well as the material consumption are reported directly against the service order. There is also a mobile application available used by service technicians out in the field to easily plan and report their work.

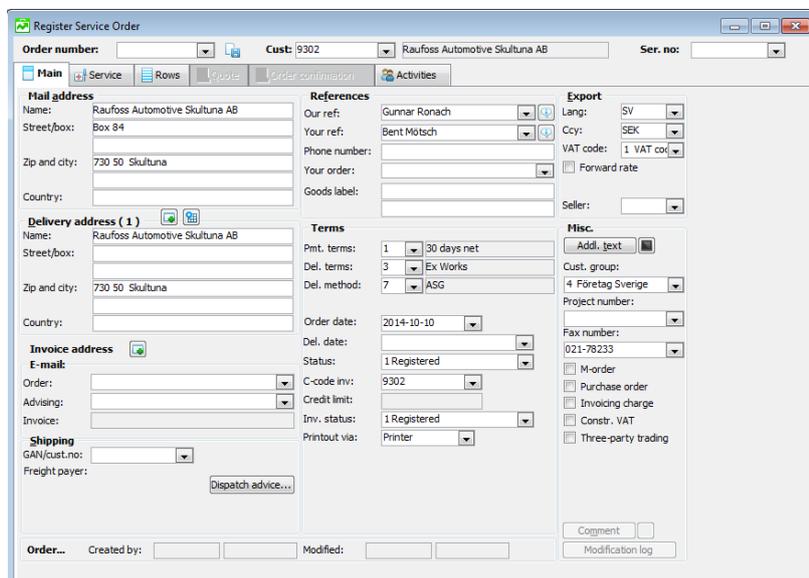
A service order can be linked to a serial number. If so, information will be saved to the serial number regarding service agreement as well as planned and finished service engagements.

Service Order Flow

The service order flow starts with you registering a service order and printing an order confirmation. You can link a serial number to the service order, this is optional but recommended. On the order you price work, travel and material. The available pricing alternatives are Continuous, Fixed and No charge.



The Service Management menu



Under the Service tab in the Register Service Order you register service as well as enter technicians and price.

You can see all service orders in an order list. You can also plan your resources against the selected or prospective service technicians. This function is also available during the order registration.

Then you select if the service will be performed in-factory or at the customer. If the service is performed in-factory, you can arrival report the service order to see when the service object has arrived.

You can print a pick list for the material that you will use to perform the service.

When the service has been performed, you report the service order in the Report Service Order procedure in MONITOR or in the mobile application. You always report the actual time and material consumption, and then the pricing rules will determine the customer price.

You can print a service report and send it to the customer when the service is finished/reported. The report will then function as a type of delivery note or receipt for the finished service.

You can also make it mandatory to authorize the invoice basis before it can be printed. This is optional and determined by a setting, but it can also be activated for individual orders. The actual invoicing is made in the same procedure as regular invoices however, the invoice form differs a bit from the regular form.

Planned service engagements like service agreements can be registered in a separate procedure and be released as actual orders when it is time for service, a kind of service plan.

Service Management in MONITOR Mobile

When a service order is registered for a service technician, a message appears in his or her smartphone/tablet computer. This way the technician will be informed that a service order has been delegated to him/her.

You can see all service orders in a list in which you also can start the service order and thereby start registering time. In addition to time, you can also report material and travels, enter comments and link images. In the mobile application, the customer can sign the finished service. The reporting will then be made directly in MONITOR and an invoice basis will be created, stock balances withdrawn and images and signatures will be saved to the order and serial number.



The reporting can be made even if you do not have an Internet connection. If so, the reporting will be executed in MONITOR as soon as you gain access to the Internet.

The mobile application requires smartphones and tablet computers with the operation system Android, iOS or Window Phone.