



## Infor ERP SyteLine FS Plus



Reduce cost of service & warranty repairs

Respond faster to customer inquiries

Better utilize & allocate resources

Offer flexible contract & billing options

Up-sell service contracts & renewals

Increase service revenues

Better control & manage inventories

Reduce equipment downtime

Improve product quality

Anticipate service impact from product changes

Increase productivity & employee morale

Match skill sets / certifications with job

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# Effectively Manage Your Customer Communication Interfaces

Today's service organizations can achieve world-class performance in both customer satisfaction and productivity by effectively managing the communication interfaces of both external and internal customers. Infor ERP SyteLine FS-Plus Service Management software speeds the information flow between business units to accelerate performance and helps achieve service excellence. Existing customers tell us they use Infor ERP SyteLine FS-Plus for three reasons:

- 1) it helps them improve operational efficiencies
- 2) it acts as a delivery mechanism for their products and services and
- 3) it helps to create value and stakeholder wealth for their organizations.

### Improve Efficiencies

The right service management system improves efficiencies by increasing throughput, decreasing transaction costs, and helping to monitor critical numbers. Our customers tell us Infor ERP SyteLine FS Plus helps their service personnel respond quicker, utilize resources more efficiently, schedule and dispatch technicians best suited for the job, proactively schedule preventative maintenance, and manage repair part inventories with greater accuracy.

### Acts as a Delivery Mechanism

Infor ERP SyteLine FS Plus acts as a delivery mechanism for your products and services to build customer loyalty and sustain a competitive edge in attracting new customers. Responsive, consistent, and effective service performance is needed to support even the best products. Our customers tell us Infor ERP SyteLine FS Plus helps them deliver quality products and service with a profitable return.

### Information is Power

In order to respond quickly to customer inquiries, service personnel need access to the right information. Customers tell us Infor ERP SyteLine FS Plus is a transparent information infrastructure that provides access to all pertinent information that leads to better decision-making.

### Create Corporate Value and Stakeholder Wealth

Using Infor ERP SyteLine FS Plus Service Management as a product and service delivery mechanism, our customers experience improved efficiencies and have access to accurate information when and where they need it. You too can achieve best-in-class service excellence with improved customer satisfaction while maximizing uptime and profitability! Ultimately, this leads to increased corporate value and stakeholder wealth.

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## Call Center & Incident Tracking

Infor ERP SyteLine FS Plus Service Management contains complete Call Center functionality allowing customer service representatives to track and manage customer inquiries, offer front-line support and obtain information about a problem or issue. Information available through the Call Center at the incident level includes...

- Customer Profiles – contact information, service history, products purchased as well as open incidents
- Warranty/Contract Information – view warranty and service contract coverage by individual product
- Call Escalation – user-defined priority codes to ensure the proper attention is given to specific calls
- Knowledgebase – store resolutions to all incidents in a central repository to allow for quick searches to answer common or recurring questions
- Event Tracking – a complete communication log can be recorded from initial call to resolution
- Mean Time To Repair – produce information on the amount of time required to service different items with varying reasons for service

The Infor ERP SyteLine FS Plus Service Management Call Center provides information needed to help customer service personnel improve efficiencies increasing customer satisfaction by reducing the amount of time to resolve issues.

## Resource Scheduling

Resource Scheduling helps you match technician skills with job requirements as well as provide total visibility of available partners for better utilization and allocation of resources.

- Flexibility Partner Definition - define as subcontractors, employees, customers, resource or any combination
- Drag/Drop Scheduling – total visibility of available partner and material capacity with the ability to quickly change times or resources for a task
- Skills/Certification/Location Matching – assign partners to incidents or service orders based on the certification or skill level required to service an item
- Automatic Service Order Generation – recurring maintenance or service calls can be setup to be automatically generated and scheduled
- Partners – scheduled against incident, service order or Infor ERP SyteLine project
- Resource Scheduling – integrated to standard Infor ERP SyteLine Material Requirements Planning functionality

Resource scheduling provides total visibility of available partner for better utilization and allocation of resources. This helps to reduce transaction costs associated with service and repair requests.

## Service Management

Service Repair Orders (SRO) are the primary “documents” used for task management, cost tracking, and billing operations within Infor ERP SyteLine FS Plus. An SRO can be used to handle any of the following types of service orders...

- Service Calls – for tracking service history performed on any specific product/unit/component
- Warranty Claims – for processing claims submitted by dealers/consumers for reimbursement
- Preventative Maintenance Orders – for scheduling maintenance and recording inspections, calibrations, etc., for internal machines or manufactured items
- RMAs- for tracking the return of defective products from customers or consumers
- Rework – for recording additional costs due to rework performed on finished goods that have been returned
- Time/Expense Tracking – record all material, labor and miscellaneous expenses incurred during a service call
- Multiple Lines – service multiple products under one SRO

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- Multiple Operation – perform multiple tasks under one SRO line
- Project or Work Breakdown Structure – use multiple lines and operations to create detailed task list of activities to be performed by project or phase
- Invoice Integration to Infor ERP SyteLine – invoices generated from Infor ERP SyteLine FS Plus are completely integrated in the standard Infor ERP SyteLine accounts receivable module
- Project Time & Materials – for collecting time & material costs attributable to a standard Infor ERP SyteLine project

The service management functionality and SRO's play a significant role in the delivery mechanism for your products and services. SRO flexibility makes it easier for service personnel to configure and execute a service order thereby decreasing transaction costs and increasing service level performance.

## Service Contracts

Infor ERP SyteLine FS Plus Service Management provides flexible contract administration allowing you to tailor your contract options to meet a variety of customer needs.

- Contract Rates – contract rates can be fixed rate, discounted, calculated, standard, or time & material
- Billing Options – contract administrators specify a monthly, bi-monthly, quarterly, semi-annual, or annual billing plan
- Discrete Contract Pricing – billing and entitlement information can be stored for use in determining pricing for material, labor and miscellaneous expenses used to service a product
- Long-Term Rental – contracts can be configured to provide monthly, quarterly, or annual rental agreements

The Service Contract module allows you to offer flexible contract and billing options to your customers and provides contract up-selling opportunities to increase service revenues.

## Warranty Tracking

Infor ERP SyteLine FS Plus Service Management gives users complete visibility into warranty information of a product including all individual sub-components. A complete history of all add-ons and replacement parts made over time is tracked and can be viewed from a single screen.

- Complete Component History – view product configuration for any date, including as-built, as-sold, and as-is configurations
- Service History – records all changes and repairs made to a product along with the reason and technician that made the change
- System & Component Warranties – assign warranties to individual parts as well as to the product or complete system
- Warranty Origination – manage the partner providing warranty service (such as vendor, manufacturer, or dealer)
- Multi-tiered Warranties – offer coverage such as “1 year parts and 3 years labor” or “36,000 miles or 3 years whichever occurs first”
- Consumer Registration History – record each time a new user registers a system

A delivery mechanism of managed warranty coverage and repairs monitors warranty commitments to maximize service revenues and increase profitability and corporate wealth.

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## Expense Reconciliation & Reimbursement

Partners enter time spent on an SRO and related expense data via the Unified Time Entry screen.

- Proper Expense Allocation – reduce the administrative task of expense tracking and properly allocate expenses as they occur
- Expense Payment Types – miscellaneous expense payment types include credit cards or personal expenses
- Reconciliation – reconcile charges to company credit cards and bill expenses to the corresponding customer SRO's
- Reimbursement – reimbursement reconciliation for partner expenses

Administrative personnel can improve their efficiencies and reduce the overall transaction cost of servicing your customers utilizing reconciliation and reimbursement functionality.

## Plant Maintenance

Infor ERP SyteLine FS Plus Service Management Units can represent a product or internal asset. An internal asset may be a machine, facility, workstation, vehicle, etc. Units can have an associated “maintenance” schedule allowing users to set up different preventative activities required on a routine or scheduled basis.

- Complete Maintenance History – SRO's are tied to a unique Infor ERP SyteLine FS Plus Unit allowing users to track all maintenance costs and activities performed
- Automated Maintenance Scheduling – SRO maintenance scheduling for units is generated on a time or metered basis
- Warranty Tracking – track supplier warranty information for historical reference and claim submission
- Integrates with standard Infor ERP SyteLine – schedules SRO's against work centers/machines in the Manufacturing module so production downtime is Included for capacity planning
- Increase Throughput – improves maintenance efficiencies reducing internal costs and equipment downtime through flexible PM and inspection scheduling to better utilize and allocate resources

## Integration with Infor ERP SyteLine

Infor ERP SyteLine FS Plus Service Management seamlessly integrates with Infor ERP SyteLine, speeding data flow between your enterprise and the service management application.

By integrating with Infor ERP SyteLine, Infor ERP SyteLine FS Plus Service Management accesses and updates information contained in the customer, product and financial files of Infor ERP SyteLine thus eliminating data redundancy and the possibility for data entry errors.



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