

Priority for Service Management

WHY CHOOSE PRIORITY?

WORLD'S MOST CONFIGURABLE ERP

- √ tailor fields, screens, menus, reports, stationery
- √ drag and drop workflows
- √ business rules, automated data entry, automated repetitive tasks

CHOICE OF HOSTING

- √ on-premise or cloud hosted

MIXED PLATFORM

- √ any mix of PCs, Macs, tablets and smartphones

MOBILE

- √ fast enough to run over cellphone networks

INTEGRATED CRM

- √ built-in CRM provides full interaction with ERP
- √ full interaction with MS Office and Gmail suites

BREADTH OF MODULES

- √ functionality to support many industries in the same system

DEPTH OF FUNCTIONALITY

- √ detailed features for the most demanding of users

INTEGRATION/TRACEABILITY

- √ interaction between each part of the system
- √ drilldown to all related records

EASY TO INTERFACE

- √ strong API to connect to other software

EXPERIENCE

- √ 30 years of development
- √ 7,000 implementations



Full warranty handling

Service calls per serialized item or generic

Technician calendars to assist with scheduling

FAQ utility to display possible resolutions to customers

Flexible billing options for both ad hoc and contract service

Priority's Customer Service module assists you in providing efficient and effective service to customers. Specifically, it allows you to:

- Maintain a separate catalogue for parts with serial numbers and designate service-related data (e.g., prorated charge, mandatory response time, next servicing date) for such parts
- Track service calls for periodic maintenance and repair of parts (serialized and other)
- Maintain service contract
- Analyze the quality of customer service.

Service Calls

The Marketing and Sales module manages service calls and maintenance (routine servicing) of the parts at the customer site. This usually begins with the receipt of a request for service from the customer, a check to see whether the item is still covered by a warranty period or an active service contract, the assignment of technicians to repair the malfunction, and finally the reporting of the call's outcome (resolution) and the production of any required invoices.

Maintenance of service calls data is managed via statuses using the graphic BPM Flow Chart Service Calls. After defining the necessary statuses (and the paths that connect them), you can view their attributes in the Statuses for Service Calls form.

Processing Service Calls

Once you record a service call, specifying the customer, part and serial number (where applicable), a check is carried out to determine if this particular part is still covered by the warranty period or by a service contract. This enables you to determine the type and conditions of service to which the customer is entitled. A built-in safety feature precludes recording service calls for restricted customers. Moreover, if the part is due for servicing in the near future, you will receive a warning message as you record the service call – enabling you to make the repair and service the part during the same appointment.

Priority fully integrates technician calendars and resource utilization with the scheduling of service calls. Among its most flexible and functional features are:

- Support of multiple types of servicing
- Scheduling of up to three technicians for the same job
- Simultaneous categorization by the customer's description of the problem and the technician's evaluation of the malfunction
- A form displaying all active service calls, refreshed automatically every few seconds
- Tracing of follow-up and repeat calls, including the linkage of related service call documents
- An ongoing history of service calls that cross-references specific types of malfunctions with specific repairs, allowing the user to easily access past information and apply it to future actions

- Integration of technician appointments with the scheduling of service calls in order to avoid conflicts
- Maintenance of RMA numbers.

Scheduling of Service Calls

The service staff can use a number of useful screens that enable them to view the relative workload on a particular day (a scheduling timetable) or work already assigned to a specific technician.

This scheduling calendar displays, for every hour of each day, the number of malfunctions scheduled for repair during this hour and how many are still pending. This form is also used as a control tool to ensure that each scheduled malfunction is handled and closed.

Priority's scheduling mechanism fully interfaces with each technician's Calendar, and identifies any conflicts in scheduling. As the calendars are fully integrated with Priority 's intranet mail utility, reminders of any event recorded in any technician's Calendar can be sent to the relevant user.

Customer Service Reporting

When the service call is completed, a reporting procedure is carried out during which the service provider reports that the call is closed. The service report details the labor time devoted to the call, as well as which spare parts were needed and supplied during the repair.

The type of service to which the customer is entitled, within the framework of either the warranty or an active service contract, determines whether labor and parts are billable or not. Documentation of all services provided to the customer, including those that are not billable, later enables an analysis of actual service costs.

Any replacement parts documented in a service call are automatically subtracted from inventory balances (usually from the default warehouse of the technician who took the call).

Once the closing of the service call has been authorized and finalized, an invoice can be produced automatically in accordance with the charges deemed necessary and the terms of the service contract.

Historical Data Analysis

Whenever a service call is opened, both the customer's description of the problem and a professional assessment of the malfunction are recorded. In fact, each problem and malfunction can be individually described in textual sub-level forms, as is true of the subsequent repair (resolution of the problem). The next time any customer reports a similar malfunction, a history of all malfunctions of this type (be it by the customer's description or the user's evaluation of the problem) can be viewed from the relevant service call document. Furthermore, from the description of each malfunction, you can view the record of the repair that was carried out.

This utility is extremely effective in reducing the need to "re-invent the wheel"; in one keystroke, users are able to view the full history of all related malfunctions and repairs, across the entire database. In this way, trends in malfunctions and subsequent measures taken can be easily identified and be used to improve the future efficiency and quality of customer service.

As the result of handling service calls in the system and reporting on service that has been provided, an enormous amount

of information is collected. This information can be used to check on the efficiency of the servicing system, the cost effectiveness of providing service for specific parts, the identification of recurring malfunctions, workload maintenance for technicians, etc. This data is available by means of various service call reports, and particularly a pair of report generators that allow you to custom-design your own reports.

FAQ Utility

You can record your customers' most frequently asked questions (FAQs) and display them in an Explorer-style window. *Priority* provides a Direct Activation by which a service call is converted automatically into an FAQ, using the malfunction and resolution details recorded for the call.

Parts with Serial Numbers

A separate catalogue of parts with serial numbers is used to maintain and track serialized parts. Via this catalogue, *Priority* allows you to maintain up-to-date records for serialized parts, including service-related data that are integrally related to the creation of service contracts and the recording of service calls.

From within the Catalogue of Parts with Serial Numbers you can:

- Record an installation date
- View and revise warranty dates
- View any inventory transactions for this serial number including: the customer to whom it was shipped; any child or parent parts used in assembly transactions
- View the service contract that covers the part with this particular serial number

- Record and view the last date the part was serviced and the next date on which servicing is due to be performed
- View a log of service calls already made on the part
- Record the frequency and type of any servicing required for the part.

Tracing Serial Numbers in Transactions

Priority provides a mechanism for assigning serial numbers to individual parts at various stages (e.g., upon receipt into inventory, when reporting production, as the part is about to be shipped to the customer). Once serial numbers have been assigned, you can designate exactly which serialized parts are involved in a specific inventory transaction (e.g., warehouse transfer, assembly, customer shipment, customer return).

Each part can be traced, via its serial number, throughout the entire chain of inventory transactions – e.g., from the report of production, to its transfer to the warehouse, to its packing for shipment to a customer, to its actual shipment, to its periodic servicing and even to its return by the customer.

For certain transactions, you can manually open serial numbers and add them to the existing pool of serial numbers for that part. In this way, for example, you can record and thereby retain the serial numbers previously assigned to the part by the vendor.

A mechanism exists for automatically opening a batch of serial numbers for a specific part and simultaneously linking them to a particular transaction. This is

accomplished by indicating the part to be affected, as well as a beginning and ending serial number and even an optional prefix. The inventory to be affected can be pinpointed by designating the warehouse and bin in which the part is stored, its status and its work order or lot number.

Warranties and Service Contracts

The nature and conditions of the service to which a given customer is entitled are determined by the item's warranty or the terms of the service contract. Upon receipt of the service call, the process of identifying the subject of the call is initiated (according to its serial number, the customer who purchased it, service contract number, etc.). Consequently, the service terms that are suitable for this customer and part are displayed automatically.

Warranty Period

A warranty period is determined for each part for which serial numbers are maintained, beginning automatically upon the shipment of the serialized part to the customer. The warranty period is initially determined by the default designated for the part within the Catalogue of Parts with Serial Numbers, but may be revised manually.

Priority also allows you to designate the types of service covered by the warranty, determining exactly what the customer is entitled to within the framework of the warranty – which services and parts the customer is to receive free of charge. For example, in the first year, the part can be covered by full warranty, including on-site repairs and all replacement parts, whereas in the second year, all repairs are carried

out in the laboratory and only certain parts are replaced without charge.

Service Contracts

A service contract delineates the items for which the customer is covered, as well as the types of service and replacement parts that can be received free of charge (beyond payment for the contract itself). As a service contract is usually opened at the conclusion of the warranty period, it is possible to record one on the basis of previous documents: customer shipment, sales invoice or a previous service contract (in the case of a contract renewal). The customer's billing customer appears in the service contract, so that any invoice linked to the contract is opened for the billing customer.

The price of the service contract can be determined by a prorated charge (a percentage of the cost of each covered part) or it can be manually designated as a flat fee. Payment dates, previously agreed upon with the customer, are recorded together with the contract. This allows for paid invoices to later be reconciled with the contract in question.

The mechanisms that maintain service contracts can automatically record payments (for the current or the following month) and prepare invoices for them. These mechanisms enable automatic contract renewal, as well as conversion from a quote to authorized status (after approval from the customer) and finally to active status (during which the contract is in effect).

You can obtain a complete list of all service calls opened within the framework of an individual contract.

Maintenance of service contract data is managed via statuses using the graphic BPM Flow Chart Service Contracts. After defining the necessary statuses (and the paths that connect them), you can view their attributes in the Statuses for Service Contracts form.

Service Quality Control

The Customer Service module allows you to perform surveys amongst the customer population. Each survey is accompanied by a structured format of questions and responses determined in advance (which can also be updated during the course of the survey). The survey format is based on multiple-choice questions (for which several possible answers are provided). The user has free reign over the selection of questions to be included, as well as possible responses. During the survey, each customer contact's responses are recorded.

At the completion of the survey, reports can be run that organize and summarize the accumulated information in a useful format. This information can then be used to reach conclusions with the aim of making your customer service more efficient and effective.

Service Call Reports

Service Call Printouts

- Print Service Call Form
- Print Service Call-Foreign Lang.
- Print Service Quote

Call Scheduling Reports

- Daily Technician Schedule
- Weekly Technician Schedule
- Weekly Tech. Schedule (w/o Hrs)

Summary Reports

- Current Standing of Serv. Calls
- Repair History per Serial Number
- Telephone Support Summary
- Status Updates by User
- RMA Log
- Custs w/No Phone Support Orders

Technician Work Analysis Reports

- Analysis of Tech. Hours- Detailed
- Analysis of Tech. Hours-Table
- Call Summary per Technician
- Avg Response Time to Customers
- Average Service Time for Calls
- Service Call Load

Malfunction Analysis Reports

- Search Calls for Malfunctions
- Mean Time to Repair (MTTR)
- Mean Time to Assist (MTTA)
- Mean Time Betw. Failures (MTBF)
- Frequency of Resolution Usage

- Frequency of Malfuncts by Type
- Freq of Malfunctions by Weekday
- No. Malfuncts per Serial Number
- No. Malfuncts/Serial Num-Table
- Number of Malfunctions per Part
- No. Malfuncts per Part - Table
- Part Reliability (Uptime)
- List of Manufacturer Malfuncts

Replacement Part Reports

- Parts Replaced
- Surplus/Storage of Issued Parts

Service Call Analysis

- Service Manager Dashboard
- Service Call Analysis (OLAP)
- Service Call Report Generator
- Servicing Report Generator

Reports for Serialized Parts

- Upcoming Servicing
- Servicing Reminder
- Audit Trail for Serial Numbers
- History of Components
- Serialized Components (Indented)
- Serialized Parts-Rep. Generator

Service Quality Reports

- Responses to Surveys
- Customer Survey Analysis
- Customer Remarks
- Print Customer Survey Formats

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