



## TakeStock Data Sheet: Service Management Plus

**Service Management Plus helps distributors to respond quicker, make better decisions and utilize resources more efficiently.**

To build customer loyalty and have a competitive edge in attracting new customers, service organizations must deliver quality service while making a profitable return. TakeStock's Service Management Plus (SMP) solution allows users to maximize performance and improve service, thereby helping distributors achieve consistent and quality service levels.

Designed to seamlessly integrate with customer, product and financial data, SMP can be used in a variety of service applications, including call centers, field services, depot service and repair, as well as managing internally-based plant maintenance operations.

**Resource Scheduling** allows managers to improve the allocation of their resources:

- Define Partners as employees, sub-contractors, customers, resources or any combination
- Partner scheduling based on skill sets and certification
- Partners scheduled against incident or service order
- Automatic notifications of scheduled changes via e-mail
- Total visibility of available partner capacity

**Incident Entry, Visual Schedule Expense Tracking** provides a wealth of information:

- Track time spent on projects and related expense data
- Create standard AP Invoices to reimburse partners or pay credit card bills
- Reconcile charges to company credit cards and allocate to Service Repair Orders
- Bill expenses to customers or Service Request Orders
- Categorize expenses by payment type



focus on essentials

➔ **KEY REPORTS:**

Incident Report  
Create Service Request Orders  
Problem Resolution Analysis  
Work Order Report  
Planned Transactions Report

**Service Management**

- Multiple Service Request Order lines and operations supported
- Service Request Order tracking documents
- Repair activity cost tracking
- Specified serial number posting
- Ability to bill on time-and-material or project basis
- Separate warranty and service work

➔ **INQUIRIES:**

Unit Configuration Inquiry  
Unit Consumer History  
Service Request Order Inquiry  
Incident Inquiry  
Service Scheduling

**Service Contracts**

- Flexible contract billing options: monthly, bimonthly, quarterly, semi-annual and annual
- Preventative maintenance, calibrations and inspection tracking by serial number
- Automatic warranty and service contract updates
- Multiple and two-tier warranties supported
- Standard reports for contract administration

**Warranty Tracking**

- Complete visibility into serial number tracked items, including add-ons and replacements
- Two-tier warranties, such as “1 year parts and 3 years labor” or “3 years or 36,000 miles”
- Flexible query of unit configuration as of any date
- Subsequent change and repair tracking

**Service Management Plus Benefits**

- Match skill sets and certifications with service requirements
- Reduce cost of service and warranty repairs
- Anticipate service impact from product changes
- Respond faster to customer inquiries
- Better utilize and allocate resources
- Offer flexible contract and billing options
- Up-sell service contract and billing options
- Increase service revenues
- Better manage inventories
- Reduce equipment downtime
- Improve product quality

Infor Corporate Headquarters  
11720 Amber Park Drive  
Suite 400  
Alpharetta, GA 30004

770 418 2000 | Phone  
770 418 2022 | Fax