

SERVICE AND MAINTENANCE

FOR DISTRIBUTORS



For most distributors, the majority of their sales don't require much consideration after an item has shipped. But occasionally everyone has to deal with those items that require attention long after they've left the warehouse.

Tracked by a unique serial number, these items are often sold along with service contracts that include preventative maintenance schedules, warranties, etc. Keeping track of these factors can make for complicated transactions, especially if you are also monitoring service technicians' schedules and open service orders. An integrated enterprise software solution that pulls all of these pieces together can streamline your transactions of serialized items and help you monitor the items post-shipment, ensuring your customers get the service they deserve for the life of their purchase.

FROM POINT OF SALE...

The best way to understand the benefits of having service and maintenance functionality integrated in your enterprise software solution is to track the life cycle of a serialized item as it passes through the system.

For example, imagine a customer places an order with you for a hydraulic pump. That transaction will not be as easy as entering an order and sending a pick ticket to the warehouse. You have to know if a warranty or service contract is normally attached to that item, or if the item would benefit from being scheduled for preventative maintenance. You will also have to track the item's serial number so all future service performed on the item will be accurately recorded.

A service and maintenance module integrated to your enterprise software solution can automatically track all of this information for you. Many distributors already have a solution that suggests accessory items when certain items are entered on an order. Utilizing similar functionality, you can attach service contracts to particular items, so every time that item is ordered, your employees will be prompted to offer the suggested contract. If a customer purchases a service contract to go along with the hydraulic pump, a service contract record, which includes expiration dates, parts and labor covered, billing effects, etc., will be linked to the pump's specific serial number.

Warranty information and preventative maintenance schedules can also be set up at the item level. For example, suppose your supplier offers a one-year warranty on hydraulic pumps. You can set up a warranty ID for that item so all related serial numbers have warranty information attached to them at the point of sale. That way, if a customer brings the pump in while it is under warranty, you can send a warranty claim to your supplier right from your solution and be reimbursed for what the warranty covers.

Similarly, if the manufacturer recommends preventative maintenance, your technology solution can automate the reminder process. And, if there is a certain labor process or technician associated with the service, you can set them as defaults, so whenever a service order is processed from your preventative maintenance schedule, the solution will automatically suggest them for the job.

...THROUGH THE LIFE OF A PURCHASE

Once your customer has purchased a serviceable item, along with the necessary warranty, contract, and preventative maintenance programs, you must then efficiently provide the expected service. Technology exists to track labor, technician, warranty, and service information and allows you to set up everything from labor rates (i.e., regular, overtime, and premium) to technicians' schedules. When the serial number of an item to be serviced gets entered into the system, pertinent information will be available for display.

For example, a customer brings in a hydraulic pump for service and one of your employees enters its serial number into the solution. If a warranty or service contract exists for the item, it will be displayed so the employee can determine whether it applies to the service order. If the serial number does not exist in the solution, the employee has the option of entering customer, item, and serial number information on the fly.

Once the service order is entered, the employee can schedule the service by viewing a graphical display of technicians' availabilities, and dragging and dropping specific labor tasks into an open time slot, which will automatically create start and end times for the technicians to complete the associated labor. In addition, any parts associated with the service will be immediately allocated in your inventory for the job. Distributors who do not perform service in-house have the option of outsourcing service work to a third party by creating a service purchase order and sending to an external vendor.

Offering service and maintenance options to your customers can be a complicated, time-consuming process. However, an enterprise software solution with integrated functionality that automates and streamlines everything from tracking serial numbers to processing warranty claims, can simplify every step, helping you serve your customers' needs from point of sale to time of service and beyond.

ACTIVANT'S SERVICE AND MAINTENANCE SOLUTION

To help distributors automate the service and maintenance process, Activant Solutions Inc. developed the Service and Maintenance solution for Activant Prophet 21™. Service and Maintenance streamlines your transactions of serviceable items and helps you monitor them post-shipment, ensuring your customers get the service they deserve for the life of their purchase.

SERVICE CONTRACTS

The Service and Maintenance module allows users to set up service contracts as non-inventory items that, when sold on an order, automatically create a service contract record tied to a specific serial number in Prophet 21. The service contract record tracks expiration dates, contract detail, parts and labor covered, billing effects, etc.

In addition, service contracts can be attached to particular item categories so that every time a related serial number is entered on an order, Prophet 21 will automatically "suggest" the appropriate service contract. That means you'll never miss a sales opportunity, and your customers will have added security in their purchase.

WARRANTIES AND PREVENTATIVE MAINTENANCE

Prophet 21 allows you to set up warranty information and preventative maintenance schedules at the item level. For example, suppose your supplier offers a one-year warranty on a specific item. You can set up a warranty ID for that item so all related serial numbers have warranty information attached to them at the point of sale. That way, if a customer brings the item in for service while it is under warranty, you can send a warranty claim to your supplier right from the solution and be reimbursed for what the warranty covers.

Similarly, if the manufacturer recommends preventative maintenance, Prophet 21 can automate the reminder process, sending e-mail notifications to customers at specified times to make them aware of maintenance due. And, if there is a certain labor process or technician associated with the service, you can set them as defaults, so whenever a service order is processed from your preventative maintenance schedule, the solution will automatically suggest them for the job.

In both instances, Prophet 21 automatically displays pertinent information at the point of sale, thus streamlining the transaction process so you can better – and more quickly – meet your customers' needs.

MANAGING SERVICE SCHEDULES

Since you may have multiple technicians who specialize in different types of service, Prophet 21 includes functionality to help you track their schedules and preferences. You can create a business calendar that tracks typical business hours, as well as technicians' schedules, indicating time off, shifts scheduled, etc. There is also a time scheduler window that allows you to view open service orders in need of scheduling.

When you view a graphical display of technicians' availabilities in the time scheduler window, and drag and drop specific labor tasks into an open time slot, Prophet 21 automatically creates start and end times for the technicians to complete the associated labor. In addition, any parts associated with the service are immediately allocated in your inventory for the job.

Distributors who do not perform service in-house have the option of outsourcing service work to a third party by creating a service purchase order and sending to an external vendor.

SERIAL NUMBER TRACKING

Once your customer has purchased a serviceable item along with the necessary warranty, contract, and preventative maintenance programs, you must then efficiently provide the expected service. Prophet 21's service order module helps by tracking labor, technician, warranty, and service information and allowing you to set up everything from labor rates (i.e., regular, overtime, and premium) to technicians' schedules.

Since Prophet 21 attaches all relevant data (i.e., warranties, service contracts, etc.) to the serial numbers of items to be serviced, when they are entered into the system, the solution will automatically populate its fields with all available information. This way, when a customer brings an item in for service, your customer service representatives will know whether the item is still under warranty, or if its service contract covers the necessary parts and labor, etc.

If a customer ever brings in a serviceable item that Prophet 21 does not recognize, your employees have the option of entering customer, item, and serial number information on the fly. And since serial numbers can change hands from one party to another, the solution allows you to transfer ownership to another customer.

Prophet 21's integrated service and maintenance functionality automates and streamlines everything from tracking serial numbers to processing warranty claims, helping you simplify every step, and serve your customers' needs from point of sale to time of service and beyond.

Find out more about Activant Service and Maintenance at www.activant.com; e-mail distribution@activant.com; or call 1-800-776-7438, press 1.

ABOUT ACTIVANT'S WHOLESALE DISTRIBUTION SOLUTIONS

Activant® provides technology solutions and services to more than 3,800 wholesale distributors throughout North America. A leading technology provider for the distribution industry, Activant develops comprehensive enterprise software solutions to help distributors improve customer service and maximize the return on their technology investment. In addition, the company offers an Internet trading network that expedites sourcing, expands geographic reach, and streamlines transactions between distributors and manufacturers. Activant solutions are backed by a host of professional services, including support, consulting, and educational programs.

Activant Solutions Inc. ("Activant") is a leading technology provider of vertical business management solutions serving small and medium-sized retail and wholesale distribution businesses. The company serves three primary vertical markets: automotive aftermarket, hardlines and lumber; and wholesale distribution. Founded in 1972, Activant provides customers with tailored proprietary software, professional services, content, supply chain connectivity, and analytics. More than 30,000 customer locations use an Activant solution to manage their day-to-day operations. Activant has operations in California, Colorado, Connecticut, Illinois, New Jersey, Pennsylvania, South Carolina, Texas, Utah, Canada, France, Ireland, and the United Kingdom.

For more information, please visit www.activant.com.