

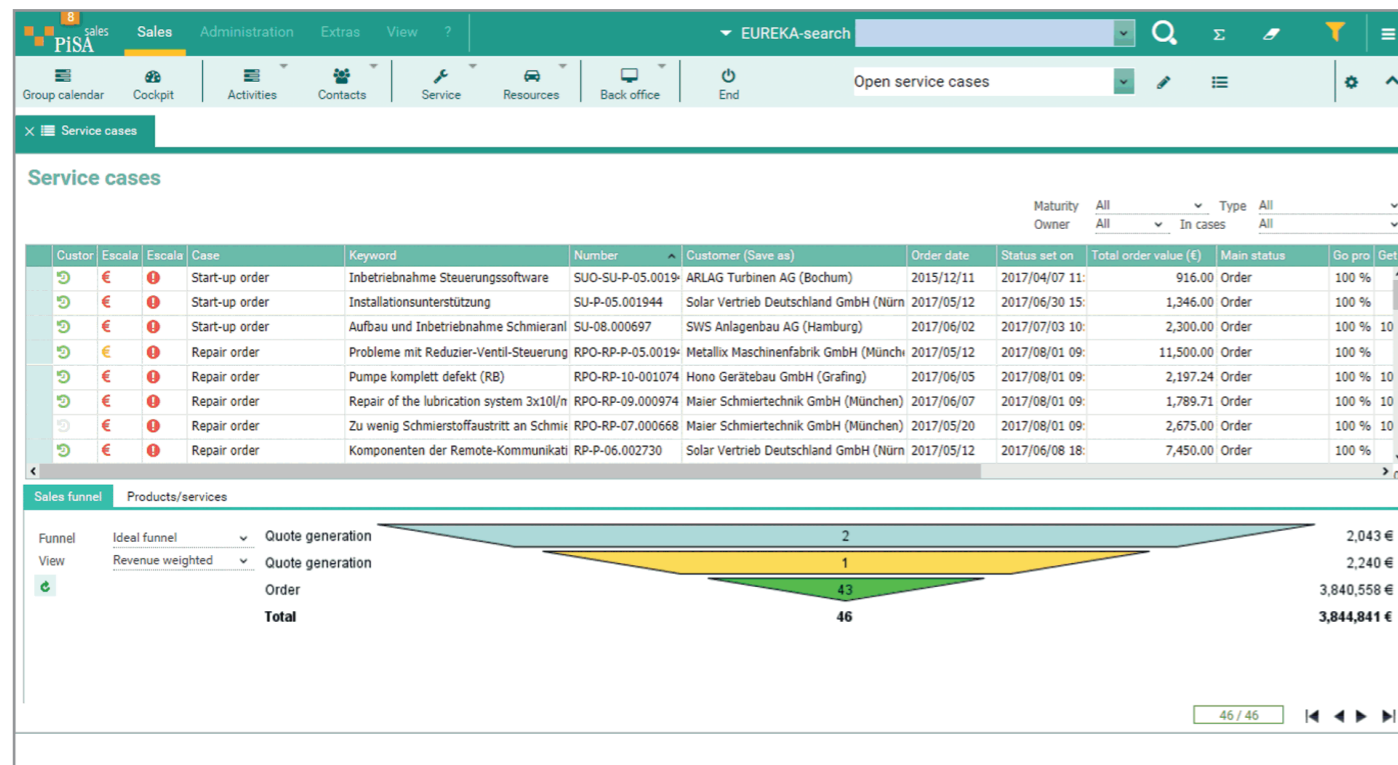
# PiSA sales Service Management

*Serve customers perfectly*

Professionalize your customer service with probably the most powerful service CRM system on the market. Choose in the PiSA sales CRM between already included solutions for helpdesk/ticketing, fault and maintenance management, processing of complaints, field service (planning and accounting), or service contracts.

In the PiSA sales CRM all cases from the service call to the service quote up to planning and realization of service appointments and their feedback (acknowledgement) can be illustrated and be controlled. You keep the overview about all cases, the service sales, the service-most intensive products or the extent of utilization of your staff members. With an efficient helpdesk your employees are able to react thanks to modern CTI coupling to your phone system as well as an integrated knowledge database fast and reliably to customer inquiries. Your field staff profits from the mobile access to its customer data and mission data. The PiSA sales Service Module provides the following functions for the intelligent management of all your customer service processes:

- ✔ service call/ticket (enquiries, claims or faults, etc.)
- ✔ FAQ knowledgebase
- ✔ service quote and service order incl. all components for material, spare part business and mission-oriented service
- ✔ support of multi-level service appointment planning with rough planning coming from the dispatching department and fine planning done by service employees
- ✔ planning board for service actions and scheduling of resources
- ✔ service accounting and digital to sign reports for the service technician
- ✔ display of customer installations (plants, facility, machines, equipment) incl. service card respectively bought products by the customer incl. service agreements
- ✔ support of event-driven and periodic service processes (periodic maintenance and maintenance agreements)



Overview of service calls

Organizing customer-related information in the PiSA sales CRM enables an optimal connection of service management with other data, for instance with:

- ✔ customer, operator and supplier data from your CRM
- ✔ quote and order data

- ✔ product data and bills of material from your ERP
- ✔ documents.

With the seamless connection of pre-sales, sales and after-sales processes you establish a service network that integrates all entities involved: from supplier, to service partner and finally to the user.

### Service calls

- ✔ capturing of enquiries, tickets, claims or faults directly at the customer form or at the related service object
- ✔ fast generation of service tickets in case of incoming call (CTI interface) or incoming e-mail (e-mail connector)
- ✔ quick check of recent service agreements due to connection to the contract module
- ✔ detection of proposals for solving problems using a direct connection to the knowledgebase (FAQs and error codes)
- ✔ quick response to FAQs via e-mails with text modules
- ✔ analysis of service levels/reaction times
- ✔ integrated escalation management with automatic notification of responsible staff members

### Service quotes and service orders

- ✔ create a service order directly from the customer, from the service call/ticket or in the service object/product
- ✔ capturing of all service-relevant quote data and order data for repair, maintenance, spare part delivery, inspection, etc.
- ✔ flexible creation of workflows using activity templates
- ✔ quick access to product data, as for example spare parts, services, maintenance packages and service-relevant documents
- ✔ position-referring account of services, as for example by time effort, cost of materials, list price, warranty, etc.
- ✔ creation and tracing of maintenance orders in the contract with retrieval on deposited maintenance intervals

### Service planning board

- ✔ create and schedule service actions
- ✔ assign personal and technical resources like service technicians and vehicles easily via drag-and-drop
- ✔ grouping of resources and find them by skills
- ✔ overload of utilization of resources is indicated immediately, conflicts are immediately recognized
- ✔ release of scheduling based on status (action in planning, resources assigned, action released)
- ✔ integrated interface to plan routes on a map (Google Maps, Bing, HERE, etc.)

### Service accounting and service reports

- ✓ consistent registration of all feedback data in the system
- ✓ enter provided services and used spare parts
- ✓ enter working hours, break times and travel time incl. expenses calculation on the basis of deposited hourly rate as well as extra charges and discounts, e.g. for night work
- ✓ enter different cost items incl. flexible calculation, e.g. travel expenses in km or km zones, overnight stay, etc.
- ✓ preparation of digitally to sign service reports on site
- ✓ optimized field service solution for the access to service data (online and offline), e.g. for service appointments, service orders, accounting sheets, knowledge database and spare part catalogues

### Customer installation and service objects

- ✓ detailed display of customer installation by automatic transfer of ordered product structures from sales
- ✓ update of customer installation (replacement, removal, addition of parts) incl. history
- ✓ record changes of ownership / changes of location of machines, for example
- ✓ simply identify expired warranties, suppliers' parts or maintenance-relevant parts
- ✓ definition of service objects for storing service-relevant data, such as basic warranty, warranty, maintenance intervals,
- ✓ response time, etc. (service-/machine folder)
- ✓ contracts with extended delivery to define periodic services (maintenance, inspection, etc.) with interval

### FAQs and error codes

- ✓ classify and evaluate FAQs
- ✓ automatic detection of relevant FAQs and fast identification of trouble area and trouble type when capturing service calls
- ✓ use analyses to identify often affected products or often occurring errors, that way you are able to evaluate, for example manufacturing or supplier quality

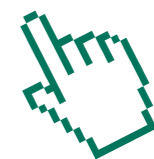
### Contract management

- ✓ management/monitoring of service contracts and maintenance contracts
- ✓ automatic generation of service actions according to maintenance intervals agreed upon in maintenance contracts
- ✓ linking with contract partners, service processes, service objects, documents and further information
- ✓ enter contract details, such as durations, periods,
- ✓ renewals, security information, discount agreements, etc.
- ✓ automatic reminder in case of expiring contracts



We will be pleased to advise you!

[www.pisasales.de/en](http://www.pisasales.de/en)



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Request CRM information package:



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