



Field Service Management: Making Service Pay

Solomon Field Service Management

Comprehensive Capabilities

Count on Solomon IV® to automate and simplify every aspect of your service-based business, from processing service requests to billing for service. As a result, everything runs more efficiently, making your operations more profitable, with more satisfied customers. Use Solomon IV Field Service Management to enter service requests and dispatch technicians quickly and accurately, stay on top of service contracts and equipment maintenance, and make short work of financial activities such as pricing, invoices, commissions, and equipment-rental billings. Capabilities even include wireless communication, enabling technicians in the field to get assignments, order parts, and send in billing information without having to wait to return to headquarters.

Automated for Better Customer Service

Whether your company offers services to consumers or provides finish goods to businesses, maintaining customer satisfaction and loyalty is critical in today's competitive markets. Improve customer service by using Solomon IV Field Service Management to automate service activities and streamline business processes. Enjoy a single point of entry and look-up for critical service information, so your staff can spend less time dealing with data and more time serving customers. They'll have easy access to information to provide the best service possible, including service history information that enables them to identify recurring problems and correct them efficiently. Take advantage of a wide range of other time-saving, automated capabilities, such as proactive message alerting to tell you whether a purchase order is required or an account is overdue, and automatic creation of tickets for periodic maintenance events.

"We made a good decision with Solomon. It was the only choice that addressed all the areas of our business – distribution, contracting, and service – and, at the same time, could consolidate our multiple locations on one common system."

Jim MacDonald, President, R.F. MacDonald Co.

Seamless Integration

Get the complete integration of capabilities that complicated installations and complex maintenance demand. Solomon IV Field Service Management is integrated with Solomon IV Project Management, Advanced Distribution, and Financial Series, to streamline resources and tasks, combine time and expense overhead, and represent profitability accurately. Integration both with other Solomon IV series and within Solomon IV Field Service Management eliminates the need for time-wasting, error-prone, duplicate data entry, allowing you to make the most of revenue opportunities. For example, with field service management and accounting capabilities linked, service technicians can electronically send billing information to Solomon IV accounting systems from the field, allowing billing to be accomplished in hours or days instead of weeks. And with Service/Dispatch and Flat Rate Pricing capabilities linked within Solomon IV, you can invoice by flat rate price rather than by time and materials if desired – and your customer service representatives can quote flat rate prices linked to Service/Dispatch fault codes on the fly.

Business Heating Up

In business since 1956, the R.F. MacDonald Company today sells and services boilers, pumps, and related products and systems from more than 30 leading manufacturers. The company has 155 employees (60 of whom are factory-trained, full-time field-service technicians) and maintains seven locations in California and Western Nevada. Five of the locations have extensive parts inventories to support a thriving field-service business.

The R.F. MacDonald Company was well overdue to upgrade to a newer solution that would better support the company's diverse lines of business and multiple locations. Most of the packages that company president Jim MacDonald considered lacked the comprehensive scope that he felt was necessary for his business.

With Solomon financial and business management software in place, the R.F. MacDonald Company can realize its vision of standardizing all seven of its locations – including the five that house significant parts inventories for the company's field service operations – on one common software infrastructure. This enables more efficient reporting, inventory management, and other operations throughout the enterprise. The addition of Solomon Project Management in the next phase will improve the company's tracking of job costs; and the extension of field service capabilities to all seven offices should improve field service efficiencies dramatically.

"Most software packages we looked at were really only good at one set of functions, such as accounting, or good for one type of business. It's hard to find one that does it all, and that's the difference with Solomon," stated Jim MacDonald, President of R.F. MacDonald Company.

Solutions

Solomon IV Field Service Management enables service-based businesses to manage service calls, contracts, equipment maintenance, and flat rate pricing more efficiently and profitably than ever.

Service/Dispatch

Take the uncertainty out of managing field service. Use the automated capabilities of Solomon IV Service/Dispatch to process service requests, check customer account status, track any customer's complete service history, and even assess technician profitability. Retrieve all the information you need to accomplish this, with just a few mouse clicks. So you can spend more time helping customers and less time managing systems.

When you need customer information right away – to process a service request, respond to a customer call, or bring a technician up-to-speed on a situation – take advantage of a wide range of search criteria to get the data you need instantly. From a single screen, search by name, address, phone number, zip code, customer ID, or equipment serial number to retrieve anything you're looking for: customer information, service call details, preferred technicians, and payment types.

Increase the efficiency of your field service operations by managing service calls better, communicating with technicians in the field via wireless technology, and streamlining invoice entry. Eliminate unnecessary service calls by automatically alerting customer service representatives to issues such as credit questions, unauthorized requests, and existing open service calls. Sort and select service calls more flexibly by branch, technician, geographic area, call type, and status. Enable

field technicians to remotely communicate with headquarters, send in billing information, and even order parts in a far timelier manner. Finally, invoice a wide variety of service calls based on whatever criteria work for your business, and enter all the information you need on a single invoice, including parts used versus parts purchased, work hours versus billable hours, in-house warranty versus manufacturer warranty, and more.

With seamless integration between Service/Dispatch and Payroll, send labor information directly to Payroll, eliminating the wasted time and potential for errors that can come with entering information twice.



To reschedule service calls, simply drag-and-drop them on the Dispatch Board.

Service Contracts

Maximize revenue for each service agreement by using Solomon IV Service Contracts to manage contracts more effectively. You'll transform service agreements from a management nightmare to a major revenue source.

Instead of dealing with uncertainty about what equipment is covered under contract, know exactly what equipment is covered and its entire history. Rather than being overwhelmed by the demands of contract renewals, stay on top of the process with detailed service histories and the unique Contract Expiration Process, which allows you to proactively view any service agreements that are up for renewal. And if you have customers who are canceling contracts, stop wondering why. Let Service Contracts capture all cancellation details automatically, and get the information you need to decrease the incidence of cancellations.

When you need contracts that cover multiple sites for your customers, or you want contracts to extend over many years, easily meet these needs with Service Contracts. Include equipment from an unlimited number of locations on a single contract, set up contracts to handle multiple years of coverage, and design contracts to renew automatically. The Service Contract Profitability Report gives you important information on how contracts are performing so you can make appropriate adjustments, if necessary, when it's time to renew.

Easily maintain separate billing and revenue schedules on whatever frequency is appropriate for each – monthly, quarterly, semi-annually – and customize amortization to manage and report earned and unearned revenue amounts. Each schedule is fully integrated with Accounts Receivable and the General Ledger for revenue recognition purposes.



Create different revenue and billing schedules to add flexibility to your service agreement operations.

Equipment Maintenance

Track and control every aspect of routine and unscheduled equipment maintenance to serve customers better and manage maintenance more profitably. With Solomon IV Equipment Maintenance, automate the entire work order process, generating work orders more quickly and accurately, tracking them more closely, and executing them more efficiently than ever.

Set up Equipment Maintenance with an extraordinary level of flexibility, assigning technicians according to a variety of criteria from site to skill level, scheduling maintenance by calendar or metering criteria, and assigning costs according to specific accounting requirements. Then manage every aspect of the preventive maintenance cycle effectively, with capabilities for determining suggested versus actual scheduled dates, integrating with dispatch (without overwhelming dispatchers), generating materials lists for ordering and pick-up in advance, and displaying hours for maintenance calls on your desktop.

Increase customer satisfaction and build customer loyalty by keeping accurate details about every piece of equipment serviced at their sites – and accessing the

data at the click of a mouse. So when a customer asks about when a piece of equipment was purchased, or the last time it was serviced, you can provide an accurate answer instantly. You'll also always have the information on hand to proactively manage preventive maintenance for them, and make recommendations before any potential problem affects their day-to-day operations.

If profitability for the equipment you service is tough to determine, use Equipment Maintenance to track and view it by months and year-to-date.

From a single screen, enter or look up detailed information for any piece of equipment you service.



Flat Rate Pricing

Exercise full control over every flat rate in your organization with Solomon IV Flat Rate Pricing – without having to purchase expensive flat rate books. Simply use Flat Rate Pricing to rapidly build and manage your own customized pricing catalog. You'll give your customers more reason than ever to place full confidence in your service organization by making it easy for your technicians to give them printed price quotes on specific services – on the spot, anytime.

Enjoy an extraordinary level of flexibility in implementing and using Flat Rate Pricing. Set it up with unlimited multi-level pricing plans, mark-ups, and printing categories. Enter a new flat rate for any specific job, along with any components needed to complete the job, from a single screen. Use extensive default values to accelerate data entry, including flat rate types, warranty information, and pricing levels – or override the default information at any time. Easily process flat-rate invoices, including defaulting of related labor and materials. Maintain a complete history of flat rate codes for reference anytime you need it. And view profitability by pricing plan, line item, and product group class, to ensure that every flat rate is profitable for your business.

With Flat Rate Pricing integrated with Solomon IV Inventory capabilities, preserve your profitability and gross margins for flat rate work by continuously updating tasks and add-ons relative to current material costs. And easily update and synchronize pricing of both Flat Rate codes and Solomon Inventory items simultaneously. Flat Rate Pricing and Service/Dispatch are also fully integrated within Field Service Management, so your customer service representatives can quote flat rate prices linked to fault codes in Service/Dispatch on-the-fly.

Item ID	Item Description	Class
1 10003980	1/4" OD Refrigerator Tubing	MAT
2 10006620	1/2" x 528 Yellow Tape	MAT
3 10028080	2" Lap Screws	MAT
4 10001000	Residential SVC Technician Hourly Rate - Regular	LABOR
5		

Buttons: Problem Code..., Class Subtotal...

Summary: Sub Total: 188.94, Tax: 9.09, Markup %: 8.00, Total: 206.03

Easily enter and modify unlimited flat rate codes for services.

Microsoft Great Plains Business Solutions Offices

Africa
Asia Pacific
Canada
Europe
Latin America
Middle East
United States



PO Box 414
Findlay, Ohio 45839-0414 USA
Phone: 419.424.0422
USA & Canada: 800-4SOLOMON
International: +1.419.424.0422
Sales Information E-Mail:
sales@solomon.com
www.greatplains.com
www.microsoft.com

© 2001 Great Plains Software, Inc. All rights reserved. Solomon Software, Great Plains and the Great Plains logo are either registered trademarks or trademarks of Great Plains Software Inc., in the United States and/or other countries. Great Plains Software Inc. is a wholly owned subsidiary of Microsoft Corporation. Microsoft is either a registered trademark or trademark of Microsoft Corporation in the United States and/or other countries.

All features/functions mentioned within are subject to change. This document is for information purposes only. Great Plains Software, Inc. makes no warranties, express or implied, in this document.