

# OmegaCube ERP

## Field Service

### Data Sheet

#### Field Service

OmegaCube ERP's Field Service Management helps manufacturers and distributors to keep a real-time check on service operations, job schedules invoices, spare parts inventory and costs.

It helps field personnel to become more efficient by handling service operations on the move from their smartphones and tablet devices.

Enterprises can achieve improved customer response, service revenue, reduced service costs and improved cash flow.

#### Service Requests and Tickets

- Log in-bound service calls directly as service requests or provide customers access to online portal to request service.
- Maintain customer equipment log and access this information when customer calls for support or logs a service request using on-line portal.
- Log requests against equipment serial numbers.
- Resolve requests and close them out on phone or create service tickets for field service
- Access warranty details directly at the time of request.
- Maintain detailed descriptions of problems.
- Track metrics on service by customer, equipment etc.

#### Schedule and Dispatch

- Assign tickets to field personnel based on priority, availability and experience.
- Schedule service visit based on technician availability and electronically send schedule to technician.
- Publish schedule for service personnel on a common calendar and/or personal calendar.
- Access previous history on the equipment using mobile devices.
- Electronically sign completed service record using a tablet.

#### Job and Expense Tracking

- Provide real-time information to service personnel about the service ticket while at job site.
- Allow service personnel to record resolution, spare parts and other job related information.
- Allow service personnel to record travel time, travel expenses, lunch time, job time, etc.
- Allow service person to schedule follow-up activities and request spare parts.
- Allow customer to sign the job ticket once work is completed.
- Transmit completed ticket information in real-time including time and expenses.



## Billing and Invoicing

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- Receive completed ticket information in real time into the ERP system.
- Calculate warranty and non-warranty service, and parts.
- Override billable and non-billable time.
- Create invoice automatically after review.
- Send invoices through email.
- Enter time and expense information directly for a ticket or a set of tickets.
- Scan and attach receipts using their mobile phone or tablet.
- Automatically send receipts to accounting and bill with 1 click.

## Part Sales and Inventory

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- Initiate request for parts for a service ticket.
- Access real-time inventory information.
- Link purchase order to dealers for a service ticket.
- Order spare parts from the dealer or pull from stock inventory.
- Maintain spare parts list for equipment.

## Equipment History

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- Maintain equipment sales and service history.
- Allow access to history directly to service personnel while in the field.
- Analyze cost and revenue numbers for an equipment.
- Analyze information based on make, model, customer type etc.

## Smartphones and Tablets

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- Provide access to data regarding equipment history, spare parts, service tickets, time and expense reporting on smartphones & tablets.
- Publish requests, tickets and service ticket information to field personnel, & customers.
- Capture customer signatures on a tablet.
- Provide relevant history information using a smartphone device.

## CRM and ERP Connectivity

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- Provide access to customer, contact, credit and past history information in real time from CRM and ERP systems.
- Field service is integrated into ERP system functionality like sales, purchasing, inventory and accounting.

Since 1999, OmegaCube has consistently believed in building and delivering powerful products with a single philosophy,

*No two companies operate exactly the same, and they need flexibility in their systems in order to sustain their competitive edge, always.*

Begin your first step towards business growth through automation!

**Get in Touch** with us today.