# SERVICE MANAGEMENT WITH SAP® Business One

## BOOST CUSTOMER SATISFACTION AND OPTIMIZE SUPPORT PROCESSES

Optimizing sales and service department potential is crucial for maintaining excellent customer relations. The SAP® Business One application provides support for service, sales, and contract management, allowing you to proactively manage your customer interaction for maximum business gain.

Winning new customers and retaining existing ones are vital to successful business growth and profitability. As a result, your organization needs to maintain a high customer satisfaction level. Customer service representatives are your face to the market. Interacting with customers on a daily basis, they need appropriate tools in order to address questions and resolve issues quickly and effectively while maintaining your service cost targets.

The SAP® Business One application can help you accomplish these objectives by allowing you to efficiently administer customer warranties and service contracts and manage service calls.

### Service Management Features of SAP® Business One

| Service Call Management | Warranty and Service Contract Management | Service Reports | Web-Based Customer Relationship Management |
|---|---|---|---|
| Create and manage service call records | Administer warranty and service information with contracts and customer equipment cards | Use service monitor to display all open service calls and overdue calls | Track and receive customer issues through to resolution via queued online ticketing system |
| Use the knowledge database to search for solutions to known customer problems | Create customer equipment cards using sales documents such as delivery or AR invoice | Evaluate performance by analyzing service contracts and technician call data | Build knowledge repository with remote access to support solutions |
| Assign technicians and territories to customers | Define different categories for managing contracts | Create alerts for your service call durations and volumes when limits are exceeded | Contact customers directly through the Web-based interface |
| Define authorizations to restrict service component options for users | Monitor contract terms, renewal, and expiration times for particular items | Allow technicians to view their own progress and take necessary actions | Manage projects by creating tasks and activities related to customer requests |

## Optimize the Potential of Your Service Call Operations

The service call component in SAP Business One enables you to intuitively manage your customer service calls. You can document all information about calls, including information about the customer, the service item, and the issue reported. You can also document the activities performed, such as tasks and meetings, the solution implemented, and even the expenses that relate to the service call.

You can create and manage work orders for repairs and services and have SAP Business One synchronize these work orders with service calls. To handle service calls more efficiently, you can define different queues concerning, for example, technical support, accounting issues, and sales promotions. Also, you can navigate each service call to its relevant consultant, department, or sales employee. Moreover, you can help ensure a timely response by assigning specific technicians to one particular customer or by setting response and resolution times specified for your customers.

In addition, the authorization framework enables you to restrict the service component access for certain users. For example, you can block a user from recording or changing the status of a service call or from allowing service without a contract.

### Access Known Issues Through the Solutions Knowledge Database

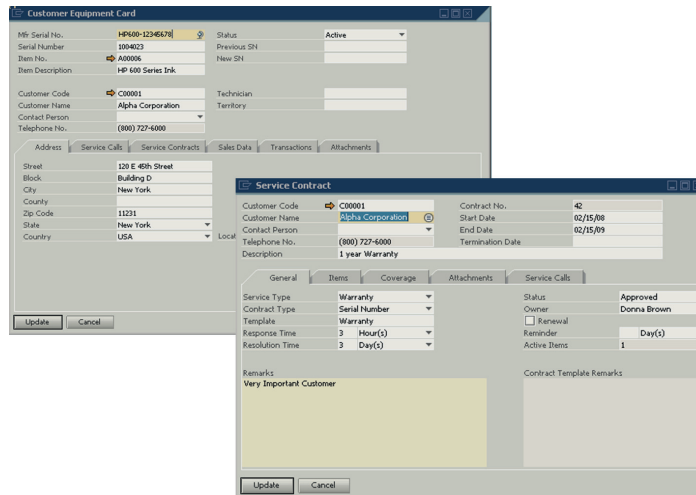SAP Business One provides a solutions knowledge database where frequently

requested information and solutions to common issues are recorded. This database provides service representatives with on-hand solutions to reported problems, enabling them to respond faster and more effectively to customer calls and lower your support department's workload. Your technicians, for example, can link an existing solution to a service call or record a new solution, and they may also link or relate service calls to one another.

### Administer Warranty and Service Contracts Efficiently

SAP Business One allows you to administer all key aspects of the customer warranty and service contract life cycles. You can define serial numbers for sold items and document the service contracts signed between the company and its customers. You can also track the history of items from the day they were sold throughout their entire service period, using the customer equipment cards.

Integrated functionality in SAP Business One automatically generates a service contract for relevant products upon the creation of a delivery or an AR invoice. Predefined templates enable you to employ an automated and standardized approach to crafting all types of contracts. Service contracts may be based on warranted products sold but may also be created separately for support services rendered for a third-party product. Service contracts include specific item details and information regarding relevant expenses such as labor, parts, and travel expenses. They also include the hours of service provided and even the suggested time that the company has committed to resolving the problem.

### Access Real-Time Service Reports

The reporting features of SAP Business One let you analyze call volumes, durations, and response times. Reports range from service calls by queue, through response by assignee, to average closure time.
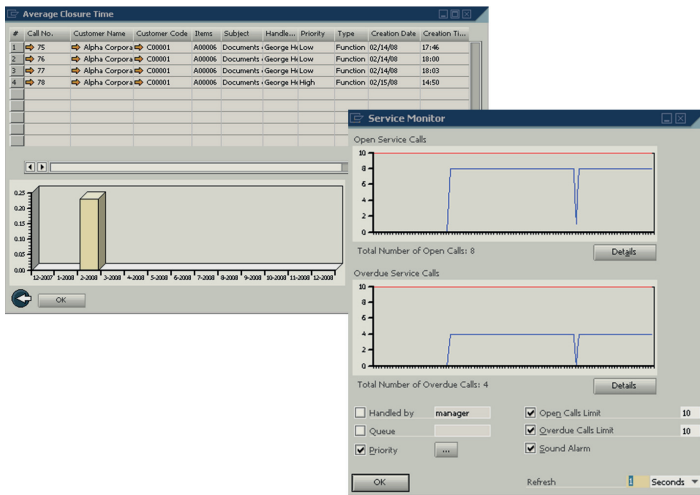
**Figure 2: Service Monitor and Average Closure Time Report**

## Realize the Benefits

The service management tools in SAP Business One let you manage the interaction between service representatives and customers. They enable you to enter and maintain information on service contracts, items, serial numbers, customer complaints, and inquiries. SAP Business One helps you guarantee ongoing customer satisfaction with quick response to service and support calls.

## Learn More

To learn more about how SAP Business One can empower your sales and service organization to grow your business and effectively service your customers, call your SAP representative today or visit us on the Web at www.sap.com/smallbusiness.

The service call monitor records call durations and volumes and creates alerts when limits are exceeded. You can use these reports to analyze the department's efficiency and performance.

You can obtain details about customer service contracts and equipment, view your own service calls, assess progress, and take any necessary actions.

## Utilize Web-Based Customer Relationship Management

Through its optional Web-based customer relationship management functionality, SAP Business One allows you to receive, manage, and track support tickets through a customer-facing Web site. You can send support requests through e-mail or via a Web form. Support team members can log in both locally and remotely to assign and reassign tickets, create activities, and contact customers directly through the Web-based interface.
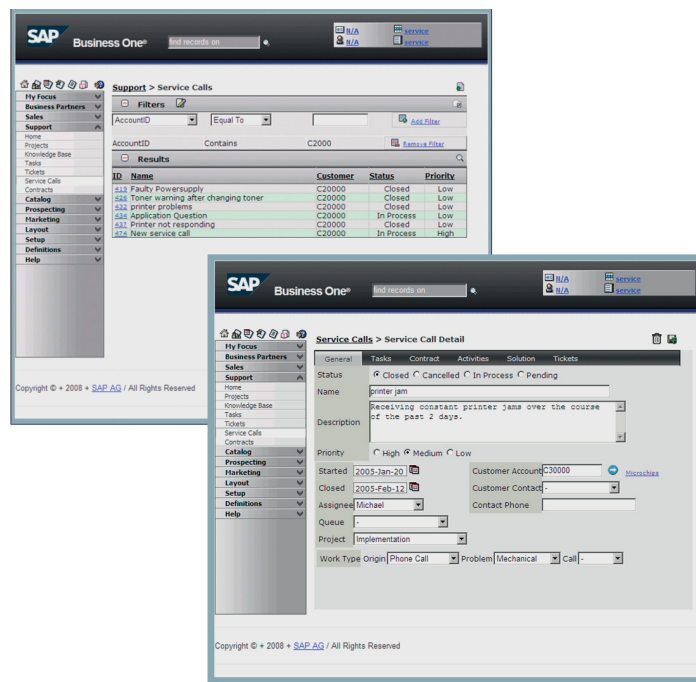
You can also build a searchable online knowledge database documenting issue resolutions for your customers and business partners, thus lightening the burden on your support department.



**Figure 3: Online Ticketing System**

## Summary

Optimizing sales and service department potential is crucial to maintaining excellent customer relations. The SAP Business One® application provides support for service, sales, and contract management, allowing you to effectively improve the results of customer interaction.

## Business Challenges

- Deal with customer inquiries in a timely way
- Manage all service-related contacts, from customers to business partners
- Maintain ongoing customer satisfaction
- Control access and authorizations for specific service data and reports

## Key Features

- **Service management** – Track services and provide support for service operations, service contract management, service planning, customer interaction activities, customer support, and management of sales opportunities
- **Knowledge database** – Include key solutions to solve various problems and cases and streamline service
- **Web-based customer relationship management** – Allow external sources to view questions and solutions regarding the organization's products and receive customer issues through ticketing system
- **Contract management** – Efficiently manage warranty and service contracts, and enter and respond to service calls quickly
- **Service reports and analysis** – Create detailed reports related to call volumes, durations, and response times, and turn results into actionable items

## Business Benefits

- **Improved efficiency of operations** due to automated and effective service and contract management
- **Increased customer satisfaction** due to faster response to customer calls and inquiries and improved problem-resolving functionalities
- **Faster and better decision making** based on timely, accurate data on all aspects of the sales and service processes

## For More Information

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