# SAP Business One

# 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 interactions 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 and timely information 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 |
|---|---|---|
| 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 |
| Use the knowledge database to search for solutions to known customer problems | Have the SAP® Business One application create customer equipment cards automatically using sales documents such as delivery or AR invoice | Evaluate performance by analyzing service contracts and technician call data |
| 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 |
| Define authorizations to restrict service component options for users | Monitor contract terms, renewal, and expiration times for particular products | Allow technicians to view their own progress and take necessary actions |

## Optimize the Potential of Your Service Call Operations

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

"SAP Business One makes everyday customer service processes straightforward – processes that are very complicated with other software."

**Sam Sinai,** President, DECO Lighting

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 reallocating your resources where they are needed the most in real time, or by setting response and resolution times specified for your customers. When limits for call volumes or durations are exceeded, you get a real-time alert so you can take necessary actions immediately.

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 or beyond coverage time.

### Tap into Solutions Knowledge Database for Fast Issue Resolution

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 create and manage service contracts for customers, product groups, and products with serial numbers. Predefined templates enable you to employ an automated and standardized approach to crafting all types of contracts. Upon creation of a delivery or an AR invoice, SAP Business One allows for automatic generation of service contracts for relevant products.

Service contracts include specific product details and information regarding relevant expenses such as labor, parts, and travel expenses. They also include the days and hours of service you commit to providing the customer, and even the suggested resolution time. Therefore, when the customer calls for a service, salespeople can ensure that contract terms are properly applied and customer expectations are met.

In addition, using the customer equipment cards in the service management functionality, your salespeople can track the history of products that are entitled to receive service from the day they were sold throughout their entire service period. They can have information not just about the service contracts but also about the service calls, inventory transactions, and sales details recorded for the product, at their fingertips.

SAP Business One helps you analyze service call volumes, durations, and response times so you can take action immediately.
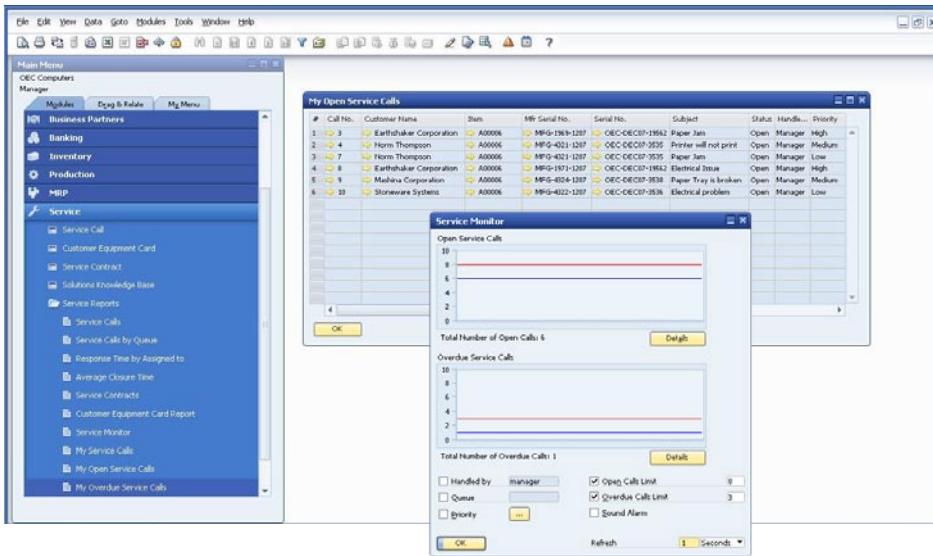
## Access Real-Time Service Reports

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.

For instance, the service call monitor in the software allows you to display dynamic views of open and overdue customer service and support calls, giving managers the ability to analyze the department's efficiency and performance, and sales employees visibility into customer issues and status prior to calling or talking to a customer. When limits for call volumes or durations are exceeded, SAP Business One gives a real-time alert so you can take necessary actions immediately and help ensure timely response to customer requests (see the figure).

## 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, products, 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.

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## 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
- Maintain ongoing customer satisfaction
- Control access and authorizations for specific service data and reports

## Key Features

- **Service call management** – Enter and respond to service calls quickly, and provide support for service operations, customer interaction activities, and resource management
- **Knowledge database** – Access known problems and key solutions through a central knowledge database
- **Service contract management** – Efficiently manage warranty and service contracts, and help ensure the timely and accurate execution of contract terms
- **Service reports and analysis** – Create detailed reports related to call volumes, durations, and response times, and turn analyses into actionable information and results

## 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

Visit us online at www.sap.com/smallbusiness.

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