EPICOR

Prophet 21 Service And Maintenance

Simplify Service and Maintenance operations

Offering service and maintenance options to your customers can be complicated and time consuming, but Prophet 21 software automates and helps streamline the process from tracking serial numbers, to processing warranty claims, to scheduling technicians — and can simplify the process.

Benefits

- Streamlined Transactions of serviceable items
- Integrated functionality connects all aspects of service work
- Automated tracking of service information for each unique serial number

Integrated Inventory System

To help distributors automate the service and maintenance process and more quickly and effectively meet their customers' needs, Epicor developed the Service and Maintenance solution for Epicor Prophet 21 software. The Service and Maintenance module allows users to enter and process service quotes and orders at all phases of a service transaction, incorporating the same functionality familiar to users from the rest of Prophet 21 software. You can order and replenish parts directly from your existing inventory, set up labor and technicians to manage work performed, track full sales and service history for all serial numbers, and minimize data entry through an automated process. There is no need for a separate inventory system to handle Service and Maintenance.

Flexible and Easy To Use

Even if the customer did not purchase the item to be serviced from you, you can still handle the transaction from a single window. The Prophet 21 service order entry was built so that you can process orders for customers, items, serial numbers, and parts that were never previously set up in your system by entering these on the fly at the time of the transaction. Prophet 21 software attaches all relevant data to the serial numbers of items, so that when they are entered into the system, the solution will automatically populate fields with all available information, for maximum ease of use. And since serial numbers can change hands from one party to another, Prophet 21 software allows you to transfer ownership to another customer.

Prophet 21®

Key Functionalities:

Enter and process service order transactions

Track warranty information and process claims for eligible parts and labour

Set up preventive maintenance (PM) schedules, including automatic customer notifications and generation of PM orders

Dispatch technicians to service jobs with drag-and-drop functionality

Track a full service history on all items and parts from all service windows

Warranty information and preventative maintenance schedules can also be set up at the item level. For example, if your supplier offers a one-year warranty on hydraulic pumps, you can set up a warranty ID for that item so all related serial numbers have warranty information attached to them at the point of sale. You can add, update, extend, or remove warranties as necessary at the serial number level, as well.

Warranty records note expiration dates for given serial numbers, as well as coverage details down to the individual part and labor level. When processed on a service order, customer pricing is set based on coverage rules by the warranty, and warranty claims can be generated to manufacturers for reimbursement. Similarly, if you or the manufacturer recommends preventative maintenance, Prophet 21 software can automate the reminder process and facilitate creation of service orders against preventative maintenance schedules.

The Service and Maintenance module allows users to automatically create a service contract record including expiration dates, parts and labor covered, billing effects, etc., tied to a specific serial number in Prophet 21 software. In addition, because service contracts can be attached to particular items, every time a related serial number is entered on an order, Prophet 21 software can automatically "suggest" the appropriate service contract. That can help you avoid a missed sales opportunity, and your customers will have added security in their purchase.

Once a service order is entered, the dispatcher can schedule the service by viewing a graphical display of technicians' availabilities, and dragging and dropping specific labor tasks into an open time slot, which will automatically create start and end times for the technicians to complete the associated labor. In addition, any parts needed for the service will be immediately allocated in your inventory for the job. Distributors who do not perform service in-house have the option of outsourcing service work to a third party by creating a service purchase order and sending it to an external vendor.

A Service Dispatch window allows you to view open service orders in need of scheduling, and helps with the efficient assigning of technician resources. The window can provide relevant information on labor requiring scheduling, such as what needs to be done, for whom, where, and when. The dispatcher can quickly assign labor to a technician in a format that makes it easy to see where each technician should be at any given time, similar to an Outlook calendar.

The information can be grouped by skill level and team, or service center, so that the dispatcher can make sure that the right technician is sent to do the job. The dispatcher can also drill into any one of the labor items to see the complete service ticket, if necessary.

Once a technician has been scheduled to perform labor, they can be notified automatically by the system.

The Service Dispatch window also includes historical information, so the dispatcher can see not only what is coming up, but previous schedules for the team, as well.

EPICOR

We're here for the hard-working businesses that keep the world turning. They're the companies who make, deliver, and sell the things we all need. They trust Epicor to help them do business better. Their industries are our industries, and we understand them better than anyone. By working hand-in-hand with our customers, we get to know their business almost as well as they do. Our innovative solution sets are carefully curated to fit their needs, and built to respond flexibly to their fast-changing reality. We accelerate every customer's ambitions, whether to grow and transform, or simply become more productive and effective. That's what makes us the essential partners for the world's most essential businesses.

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