

Service Management

What Is Service Management?

Service Management has been developed for companies that perform service on products; both their own and others. The feature is used to plan, save and report service engagements. By using the Service Management you can manage installation tasks and warranty commitments as well as urgent and planned machine service. The Service Management handles service engagements performed at the customer's location or at your own facilities. The service can be performed by your own personnel or by external suppliers/business partners. The time used for service and travel as well as the material consumption are reported directly against a service order via a linked manufacturing order.

Service technicians out in the field can also use a mobile application to easily plan and report their work. A service order can be linked to a serial number. If so, information will be saved to the serial number regarding planned and finished service engagements.

Service Order Flow

The service order flow starts with you registering a regular customer order for a service part and printing an order confirmation. You can link a serial number to the service order, this is optional but recommended. You price work, travel and material on the order. The available pricing alternatives are Continuous, Fixed and No charge. Then you select if the service will be performed in-factory or at the customer. If the service is performed in-factory, you can arrival report the service order to see when the service object arrives.

The screenshot displays the Service Management software interface, divided into several sections:

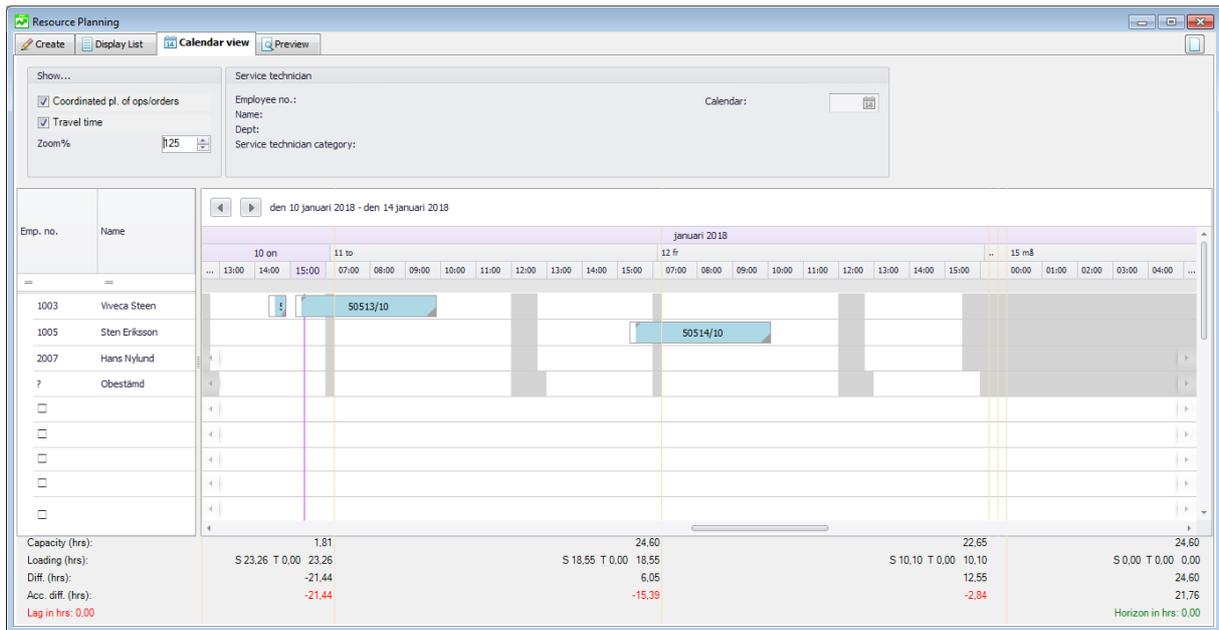
- Planning:** Includes fields for Serial number, Part number (SERVICE), Basic type (Planned service), Service location (In-factory), Service address, Service start date (2018-01-10), Finish date (2018-01-11 09:24), Start time (14:39), Planned time used (3,00 h), Service technician (Service technician), Priority (9), and Service category. A "Service technician" button is highlighted with a red box.
- Service object:** Includes fields for Part no., Name, Revision, Delivery date, Init. C-order, Warranty starts, Warranty expires, Last service, M-order, and Service plan. A "Service book" button is also present.
- Nonconformity:** Includes fields for Do not create, Nonconformity no., and Status.
- Price management:** Includes a dropdown menu set to "Calculated price on service" and a calculated price of 3 225,00 SEK.
- Service operations table:**

Op.	Part number	Name	Pricing	Each	Mark-up	Out	Travel time	WC	Operation name	Suppl. code	DA	Unit time	Cap. fact.	I
10	SERVOP1	Service part operation 1	Continuous	1 075,00	0,0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	PG600	Service			3,00 h		I
- Service material table:**

Row	Part no.	Name	FOP	Quantity	I	Pricing	Each	Out	Mark-up
1	SERVPART1	Service part material 1	10	1,00 PCS	I	Fixed price		<input checked="" type="checkbox"/>	
2	SERVPART2	Service part material 2	10	2,00 PCS	I	Fixed price		<input checked="" type="checkbox"/>	0,0

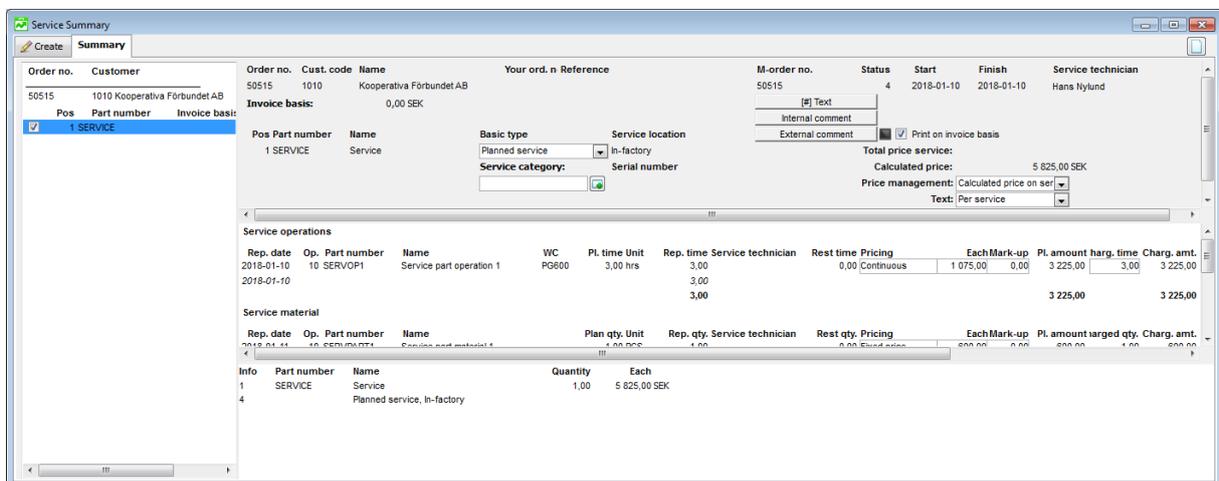
At the bottom, there are buttons for "Internal comment", "External comment", "OK", and "Cancel".

Service technicians are assigned by using the button called Service technician or in the Resource Planning procedure where you can select an available technician in a calendar view.



You can see all service orders in an order list. You can also print a pick list for the material that will be used to perform the service. When the service has been performed you report the service order in the same procedures as you use when reporting manufacturing orders, or in the mobile application. You always report the actual time and material consumption, and then the pricing rules will determine the customer price.

In the procedure called Service Summary you approve the reportings and invoice bases are created. The basis can be modified before an invoice basis is created.

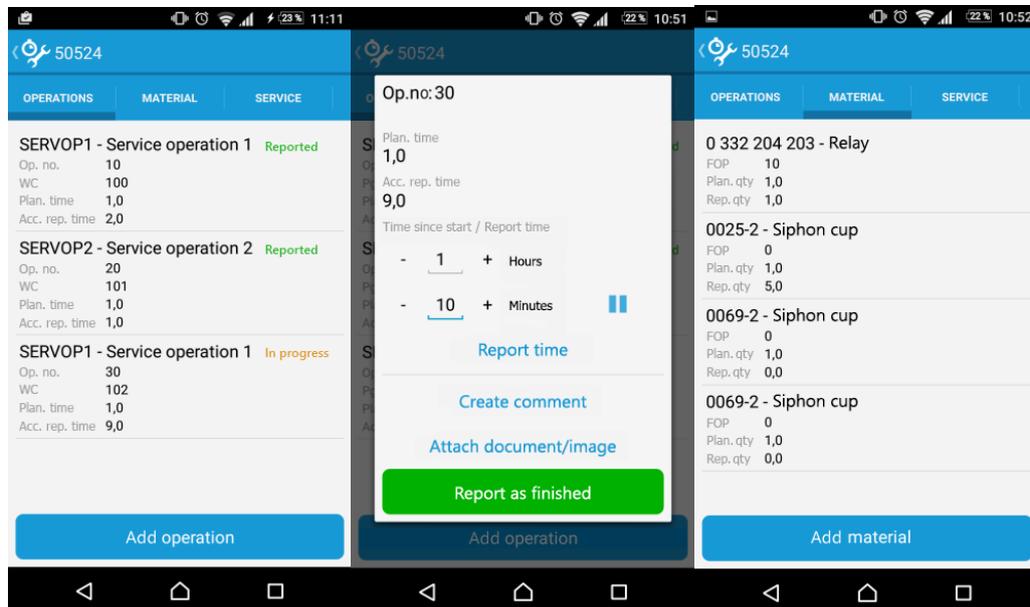


You can print a service report and send it to the customer when the service is finished. The report will then function as a type of delivery note or receipt for the finished service. The actual invoicing is made in the same procedure as regular invoices. However, the invoice form differs a bit from the regular form.

Planned service engagements like service plans can be registered in a separate procedure and be released as actual orders when it is time for service.

Service Management in MONITOR Mobile

When a service order is registered for a service technician, a message appears in his or her smartphone/tablet computer. This way the technician will be informed that a service order has been delegated to him/her. During reporting you can add work as a new operation as well as material.



You can also enter comments and link images. The reporting will then be made directly in MONITOR, stock balances will be withdrawn and images will be saved to the order and serial number. It is also possible to register meter reading, running time and number of cycles for the linked serial number. The mobile application requires smartphones and tablet computers with the operation system Android or iOS.