



Service Management

Deliver efficient
customer service!

A photograph of a man and a woman in a meeting. The man, on the left, is wearing a blue denim shirt and is looking down at a laptop screen. The woman, on the right, has blonde hair and is wearing a dark blue top, also looking at the screen. A solid blue square is overlaid on the right side of the image. The background is a blurred office setting.

Focus on Customer Satisfaction

Today, any services business that wants to stay ahead of the competition, needs to efficiently **manage customer relationships** and constantly **meet deadlines**. In the services industry, business success and growth depend on satisfied customers.

Automating sales, marketing and customer service processes, integrated with accounting management, provides services companies with the necessary tools to effectively handle customer relations, increase productivity and grow revenue and profit.

Soft1 ERP incorporates comprehensive **Service Management** functionality, assisting your company to optimize customer service, improve time and expense management and deliver top-quality services on-time and on-budget.



Inspiring Excellent Customer Service

Soft1 ERP delivers powerful **Services industry-specific** functionality, enabling services providers to:

- ✓ increase revenue by optimize scheduling
- ✓ improve response times
- ✓ increase customer satisfaction
- ✓ uncover new sales opportunities
- ✓ reduce operating costs
- ✓ achieve better performance visibility.

No matter what type of Services Company you are, **Soft1 Service Management** software provides a complete view of your customers' activities. Integrated **marketing and sales automation** tools help you track and efficiently manage sales leads and opportunities, as well as better handle support issues.

Supporting **Service Centers, Ticket Management, Task Scheduling** and **Contracts / Field Services**, Soft1 helps you respond quickly to inbound customer requests, simply by accessing customer profile and resources availability, while reducing time between call receipt and project assignment.



Accelerate and streamline your entire service operations with powerful tools and capabilities, inside a **flexible** and **configurable platform**:

- Service Calls and Allocation of Resources
- Guarantees, SN's and Lots
- Case Management
- Daily Routing
- Invoicing
- Dispatching
- On Field Service Management
- Multi Company, Multi Site, Multi Currency, Multi Lingual



Powerful Services industry-specific Functionality

Service Management

Service Agreements: Manage service agreements for a wide variety of customer requests. Handle service prices and payment arrangements.

Service Calls & Dispatching: Add and schedule service tasks. Automatically sync service tasks with Microsoft Outlook, view scheduled activities and optimize routes using Google Maps.

Service Folders & Contracts: Create service folders for offsite activities. Set up order manually or automatically. Validate customer serial number and warrantee, record service time, expenses and stock items carried by technicians in the field.

Returned Material Authorization: Establish enhanced return processing, ensuring wide tracking of pending returns.

Key Features

- Call center integration (TAPI protocol)
- Service on/off site
- Service tasks monitoring through "ticketing" system
- Recurring services scheduling and contracts
- Customer self-service portal
- Mobile service management (Field Service)
- Route management (integrated Google Maps functionality)
- Spare parts management, inventory & BOM
- Spare parts requirement planning
- CRM

CRM

Lead Management: Create, view and update customer information to effectively manage leads and sales opportunities. Link campaigns and promotional activities with leads and assign leads to sales teams.

Case Management: Create and resolve customer support issues using a single form. Link a case to Customer Satisfaction Feedback.

Customer Feedback: Utilize Case Management and embedded satisfaction survey questionnaires to improve service delivery in the field.

Project Management

Project Planning: Plan service projects, estimate labor hours and materials as well as cost data. Efficiently manage and monitor projects organizing them into multiple subprojects.

Time & Expense Management: Accurately track service project time using timesheets and charge expenses utilizing advanced expense management tools.

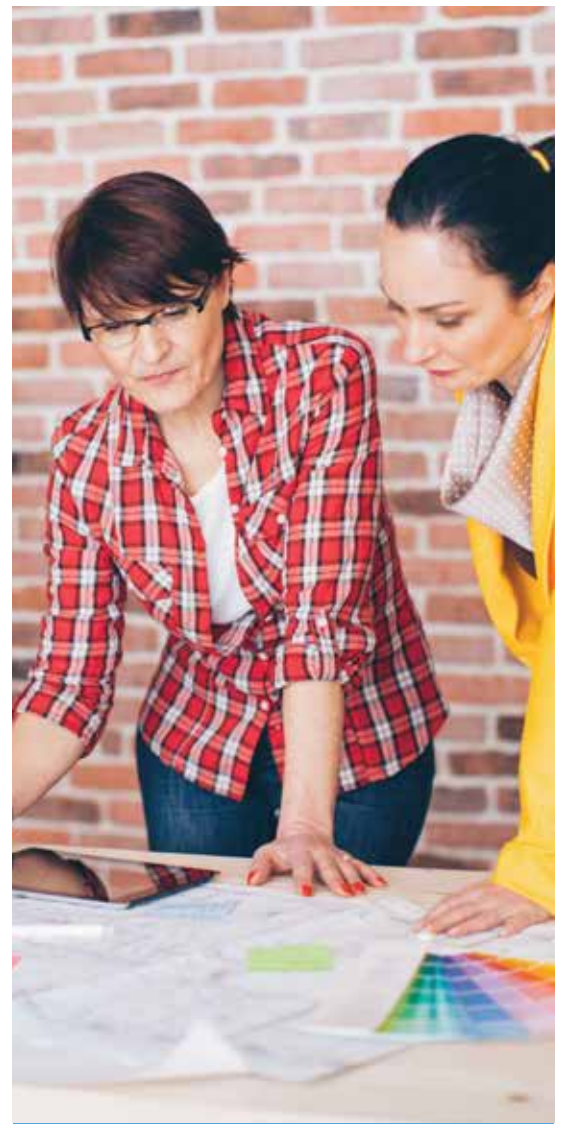
Project Budgeting: Produce project budgets (estimating labor hours, charges and materials) and effectively manage and control service tasks, comparing actual cost data to budget.

Resource Management: Schedule tasks, allocate materials and dispatch technicians based on resources capability. Enter service type and labor hours into the service call ticket and calculate labor charges.

Supply Chain Management

Inventory Management: Track stock items per site, warehouse, location, batch, serial number packages. Utilize multiple inventory control systems and valuation methods such as FIFO and LIFO. Reduce costs and eliminate waste using ABC analysis.

Multi-Site Warehouse Management: Manage storage locations and materials. Easily track inventory on web and mobile interface.



For a Wide Variety of Services Industries

Education Services

Communications

Electrical Devices Equipment

Residential and Commercial Services

Medical Equipment

Catering Services

Machinery Maintenance

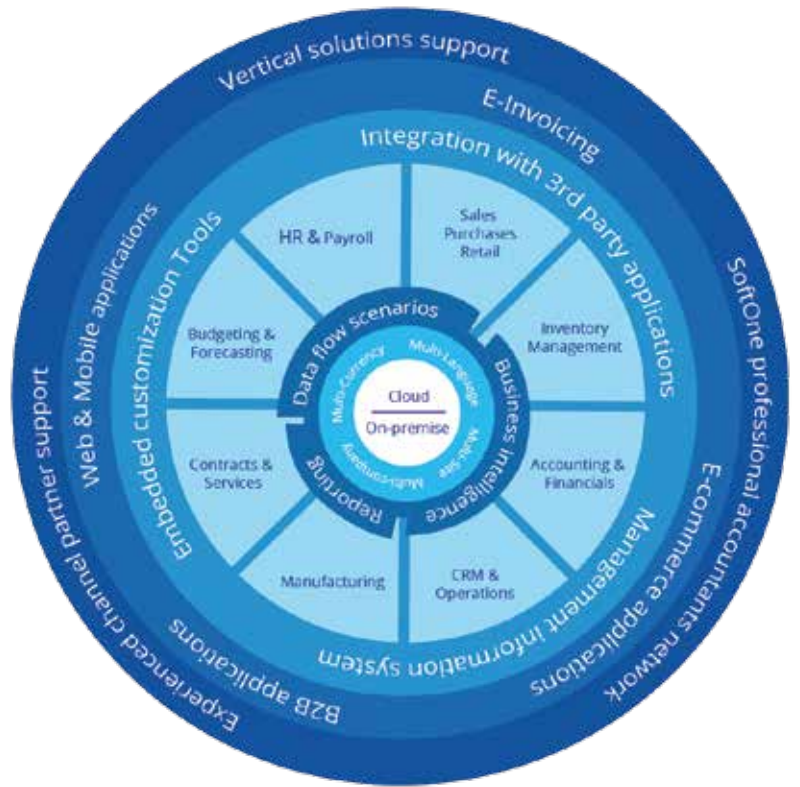
Computing and Software Houses

Service Centers

Automotive Services

“One-for-all” Solution

The **award winning Soft1 ERP** is so much more than an enterprise resource planning system. It’s an "open architecture" software that consolidates all critical business processes in a single integrated solution that helps your services business reduce total cost of ownership (TCO).



CRM

- Contact Management
- Lead Management
- Campaign Management
- Case Management

Sales Management

- Quote and Sales Opportunities Management
- Order Management
- Demand Management

Service Management

- On Field Service
- Maintenance Management
- Contract Management
- Product Serialization
- Material Requirements Planning

Performance Management

- Financial Reporting
- Bank & Cash Accounts
- Cash Flow Management
- Budgeting
- ABC Costing

HRM

- Human Resource Management
- Human Capital Payroll
- Employee Self Service
- Take your own Device

Supply Chain Management

- Purchase Management
- Shipping & Receiving
- Warehouse Management
- Material Management

Accounting Management

- Multiple General Ledgers
- Multiple Journals & Periods

Mobile Management

- Event Planning
- Mobile Showrooms
- Merchandising
- Customer Questionnaires
- Map Routing

Project Management

- Project Planning
- Resource Management
- Expense Management
- Project Billing
- Dashboards

Why Soft1 ERP is right for your business

For Your Real Business Needs

Soft1 ERP delivers great value to services companies of all types and sizes. It incorporates in a single system, service management modules that do more with less, helping you automate, simplify and streamline all of your business processes.

Your Business in the Cloud

Soft1 ERP fully utilizes the significant capabilities offered by a Cloud platform and the Software as a Service (SaaS) model. It assists your services company to deliver more value to its customers while reducing up-front expenses and operating costs.

Enterprise Mobility

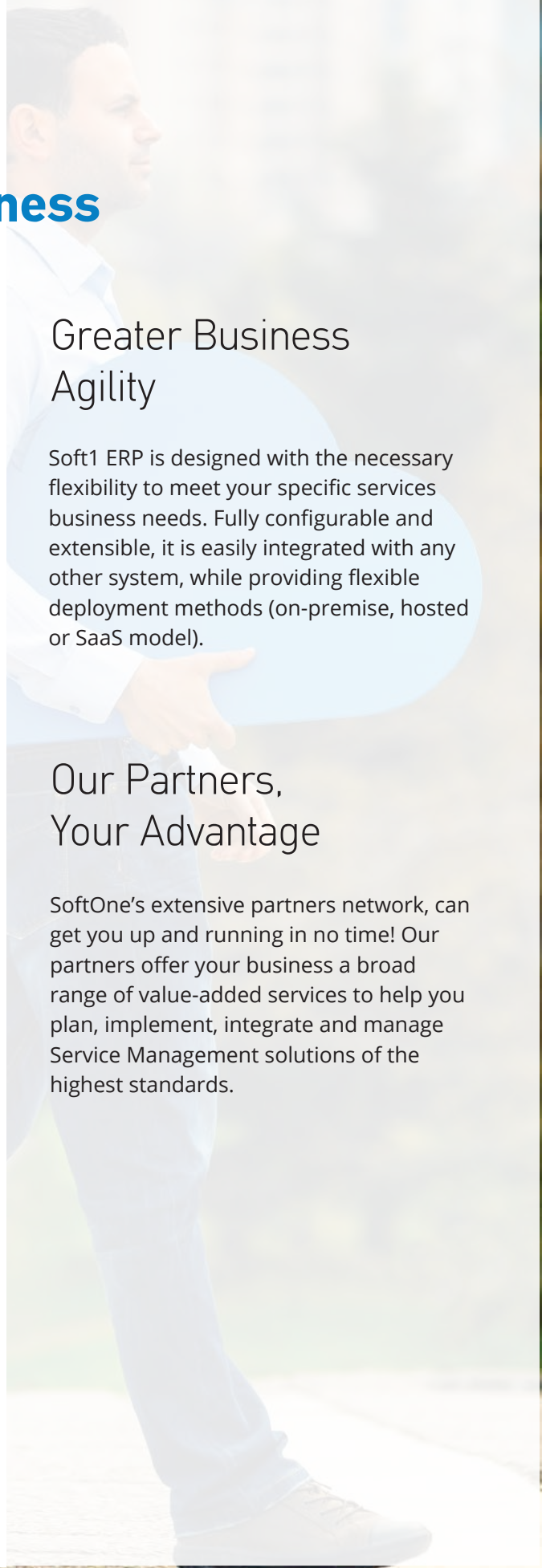
Soft1 ERP provides your services business with a wide range of web and mobile applications that expand your business software reach. These applications empower your sales team and technicians to work and collaborate from practically anywhere, using any device.

Greater Business Agility

Soft1 ERP is designed with the necessary flexibility to meet your specific services business needs. Fully configurable and extensible, it is easily integrated with any other system, while providing flexible deployment methods (on-premise, hosted or SaaS model).

Our Partners, Your Advantage

SoftOne's extensive partners network, can get you up and running in no time! Our partners offer your business a broad range of value-added services to help you plan, implement, integrate and manage Service Management solutions of the highest standards.



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