QAD Service and Support Management

QAD Service and Support Management (SSM) is the core component of QAD’s Service and Support suite and is uniquely suited for manufacturers, as it is deeply integrated with QAD Enterprise Applications. Customers worldwide rely on QAD SSM to manage all interactions related to the support, maintenance and repair of products, grow revenue, and reduce service costs. QAD SSM can be supplemented by QAD Mobile Field Service and QAD Field Service Scheduler, to provide comprehensive enhanced field service management capabilities.

The Value of QAD Service and Support Management

- Grows customer satisfaction and retention
- Grows revenue through enhanced warranty and contract sales
- Reduces the cost of warranty and contract administration through automation and complete visibility
- Streamlines service-oriented activities ranging from field service (people and parts) to returns to the manufacturer or supplier
- Supports optimization of engineer time and service inventories

Key Benefits of QAD Service and Support Management

QAD Service and Support Management (QAD SSM) provides a comprehensive set of tools for managing the interactions related to the support, maintenance and repair of products including coverage by warranty or service contract.

QAD SSM helps reduce service costs and dramatically improve the speed of service and support activities.

As an integral part of QAD Enterprise Applications, QAD SSM benefits from access to QAD Enterprise Applications data and processes, especially in the areas of master files, inventory management and financials.
Customers worldwide rely on QAD Service and Support Management to manage all aspects of after-sales support and service operations—warranty and service contract tracking and administration, installed base management, incident management, service activity recording and invoicing, and return and repair authorization processing and administration.

QAD SSM can be supplemented by QAD Mobile Field Service and QAD Field Service Scheduler, to provide comprehensive enhanced field service management capabilities.

**Service/Support Management:**

- Allows users to manage after-sales operations, including support and service coverage, pricing, and billing for warranty and contractual support
- Covers a broad range of capabilities including Incident Management, Activity Recording and Invoicing, Returns and Repairs, Contract Management, and Installed Base Management
- Allows access to enterprise information, product structures, inventory planning, financial activities and more because it is fully integrated with QAD Enterprise Applications
- Includes additional options for designing regional contracts, generating contract billing and managing the General Ledger effects of contracts

**QAD Service and Support Management Core Features**

- Keeps service administrators, field engineers and resources in sync
- Takes advantage of Key Performance Indicators (KPIs) to measure performance and utilization

*Service and Support timeline.*
• Includes call management functions for call tracking, engineer deployment, item expense labor activity reporting, failure statistics
• Manages item warranties and extended contracts with automatic triggers for renewal invoices
• Supports Return Material Authorizations where items can be returned to be refurbished or replaced, applying warranty and/or contract limits automatically
• Triggers invoicing based on warranty/contract limits
• Integrates to other inventory and planning functions in QAD Enterprise Applications
• Recall and base customer notification capability
• Automates the preventative maintenance activities

Incident Management

QAD SSM Incident Management features ensure that customers get the appropriate response to issues for fast, effective resolution. QAD SSM tracks the contact and activity through the service and support process to resolution and invoicing.

• Automates installed base updates from sales orders, incidents, return material authorizations, and the generation of installation and preventative maintenance calls
• Simplifies contract quoting, releasing, renewal and administration
• Allows users to manage all internal and external support and service activities—tracking the initial contact with prospects through support and service activities, and ultimately to invoicing and collections
• Handles incoming calls and verifies service coverage
• Enables each organization to set up escalation rules to ensure that incidents are responded to in a timely manner
• Accommodates variations in local time when tracking incidents and assigning personnel because of multiple time zones
• Allows users to move incidents from one queue to another with increasing priority until a response is made
• Defaults streamline incident creation for requests that follow predefined patterns
• Groups of incidents can be created based on a wide range of criteria, such as items needing a preventative maintenance visit, items belonging to a range of end users, or items shipped after a certain date
Call Management

In any busy call center, support specialists need to respond to requests in real time. Pending Call management features enable an administrator to design a custom data-entry system for call data, using only the data elements that are most frequently used by their business organization, and later transfer this data to a standard call. This increases the callers’ confidence in the ability of the help desk to respond to their problems in a timely manner and the overall perception of timely, efficient customer service.

- Always display or include conditional branching based on the values of key fields
- Set field validations to occur during call entry or later
- Create profiles associated with users or user groups as needed, for example, a help desk clerk and a help desk supervisor

Contact Center capabilities that are part of QAD SSM module are designed with needs of Customer Service Reps in mind. Utilizing the Contact Center view, a CSR can identify a caller and access all the information needed to respond to any customer request, and take appropriate action with just a few key strokes.

- Brings Customer, Installed Base and Call information together in a meaningful way addressing
the needs of a Customer Service Rep

- Provides ability to respond to customer requests in a speedy and accurate manner
QAD SSM’s Call Activity Recording captures full details of a service call including resources and timing

**Activity Recording and Invoicing**

QAD SSM provides a full set of features for managing repairs associated with an incident. All resources can be tracked for reporting and metrics. This helps to ensure that field service inventory is tracked and replenished.

- Allows users to set up prices for the items used, as well as other service expenses such as travel and mileage
- Includes Material Orders, which enable users to manage inventory as technicians order items specifically for an incident or simply to replenish their service stock
- Material Orders can be used, for example, to stock service vans and keep track of inventory levels
Installed Base Management

Comprehensive installed base information is a foundation of effective customer service. QAD SSM lets service organizations maintain comprehensive information about the products they sell and service and the individuals who own them. An installed base record links an item, the customer who purchased it and an end user. It also maintains details about an item, including serial number, installation date, warranty coverage and how often maintenance is required.

- Automatically or manually updates directly from sales shipments and other service activities
- Allows users to optionally limit service to items recorded in the installed base, or accept open-ended support and service incidents
  - Many functions in QAD SSM derive information from installed base records
  - Warranties defining service terms and conditions can be associated with items in the installed base
- Verifies for the user whether the item is under warranty when the customer identifies an item needing service
- Generates field notifications, letters and incidents for selected installed base records
- Installed Base Hierarchy (available in QAD 2008) When searching ISB data, service administrators can effectively narrow their search criteria by creating a hierarchical classification of installed base data, to limit the number of records returned.
Installed Base Set Up Process Map

**Service Contract Management**

Warranties and Service Contracts often count for a significant portion of a company’s revenue, but they can also present potential lost productivity and risk due to human error. QAD SSM helps companies make the most of their contract commitments by automating repetitive and time-sensitive tasks, such as renewal invoicing, and by accelerating complex or tedious tasks such as contract generation and billing scheduling.

- Defines a relationship with the service customer specifying the cost, terms and conditions for such things as telephone support, field repairs, on-site technical support and maintenance
- Allows contracts to include special items that are priced at a fixed amount, applied as percentage uplift, or at a discount to the entire contract. Taxes and trailer charges are fully integrated
- Enables users to define billing cycles—usually monthly, quarterly, or annually—for the contract at multiple levels and release contracts automatically for invoicing according to this billing cycle, creating invoices in the Sales Orders/Invoices module
- Allows users to extend service coverage with contract renewal functions
- Allows users to generate quotes and send them out for review before renewing contracts
- Allows users to optionally update prices based on current price structures during renewal
- Includes three levels of hierarchy that support two contract designs: collection of end users with items requiring coverage and collection of items, each with one or more associated end users
- Enables users to design powerful and complex service coverage relationships
- Allows users to choose between billing the contract customer or billing end users
- Generates contract invoices in summarized or detailed format
- Performs billing according to customer requirements based on billing cycle, prorated partial periods and period-based billing features
Navigate through the full process of contract management to see customer details and history and
Manage Returns and Repair Authorizations

QAD SSM manages the processing of returns, so that as inventory returns to your warehouse, your system is automatically updated and your customers get prompt credit for returned items.

- Issues a replacement item either before or after the returned item is received
- Creates work orders for evaluation/repair and manages the shipment process
- Authorizes and manages returns for repair and return to stock to the original supplier if needed.
- Returns are fully integrated with the installed base and service coverage recognition
- Automatically generates invoices or credits and tracks them in the Sales Orders/Invoices module
**Depot Repair**

QAD SSM module allows managing depot repair process involving in-house repair of products returned by customers. This process includes accurate parts and labor tracking through billing.

- Allows processing repair activity with less manual effort
- Improves response time for customer repair requests
- Reduces processing time resulting in shorter time to invoice

**Manage Calls (Depot Repair)**

![Depot Repair Process Map](image)

**Implementation Considerations**

**Business Process Review** involves reviewing warranty and service contracts and assessing the level and
type of customer-specific exceptions in order to map your business rules into the system for use during incident management processes.

**Return Policy Review** involves reviewing standard return policies to map your business rules into the system for use during return and repair processes; your current discipline for following these policies is also assessed to analyze potential revenue opportunities.

**Product Lifecycle Review** involves analyzing your products and available data for field failure rates to help develop key production planning information that will drive production plans for service, replace and repair inventories.

**Customer Satisfaction Audit** helps identify areas for improvement in customer service and support.

**General Setup** involves setting up the environment and defining system-level settings and definitions of codes critical for system operation, including:

- Install the QAD SSM product and set up the Conference Room Pilot/Prototype
- Define service engineers with skill profiles, availability schedules and cost structures
- Define service products, remote inventory locations, pricing and generic repair routings
- Define service and support activities
- Define the service and support contracts and terms including all customer specific variations

**Incident Management Process Design** involves designing the incident management process to meet customer satisfaction expectations by maximizing the effectiveness of services and support processes, while improving the profitability of the function by maintaining discipline on contracts and policies.

**Return and Repair Process Design** involves defining the integration of functions for repair work routings and production with inventory and manufacturing, and designing the return and repair process for best impact on profitability.

**Field Service Process Design** involves designing processes to help field service organizations manage field engineer scheduling, the information required to conduct service calls, additional install base data to collect on site, and parts inventories.

**Typical Implementation Plan for One Site:**

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<th>Duration</th>
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**Services Datasheet**
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