

PEOPLESOFT ENTERPRISE FIELDSERVICE



BENEFITS

- Manage your installed base effectively.
- Optimize service resources.
- Increase service profitability and reduce costs.

As customer care becomes an increasingly important part of global business strategy, field service organizations are faced with a growing number of challenges and opportunities. Dispersed staff must be coordinated, complex technical issues resolved, inventory managed, and warranties and service agreements met—all while running a profitable service operation.

Oracle's PeopleSoft Enterprise FieldService allows organizations to minimize costs and drive customer satisfaction through comprehensive service order management and efficient service delivery. Our solution streamlines and automates every step in the process, from initial customer request to resolution to billing. Technicians are better able to resolve service matters quickly, because the system dispatches the right person at the right time, equipped with the right parts.

Comprehensive Installed Base Management

PeopleSoft FieldService makes it easier to manage your customer base by enabling you to automatically track, maintain, and monitor accurate information about your installed base—from initial order through ongoing maintenance. This capability allows you to effectively manage every aspect of your field service operation, from preventive maintenance programs to service-related costs.

A 360-Degree View of Customers

The service process begins with a 360-degree view, giving service representatives access to detailed information about customers, their installed products, historical and current cases, and related service orders. Field service orders are automatically populated with this information, which eliminates redundant data entry and the possibility of errors.

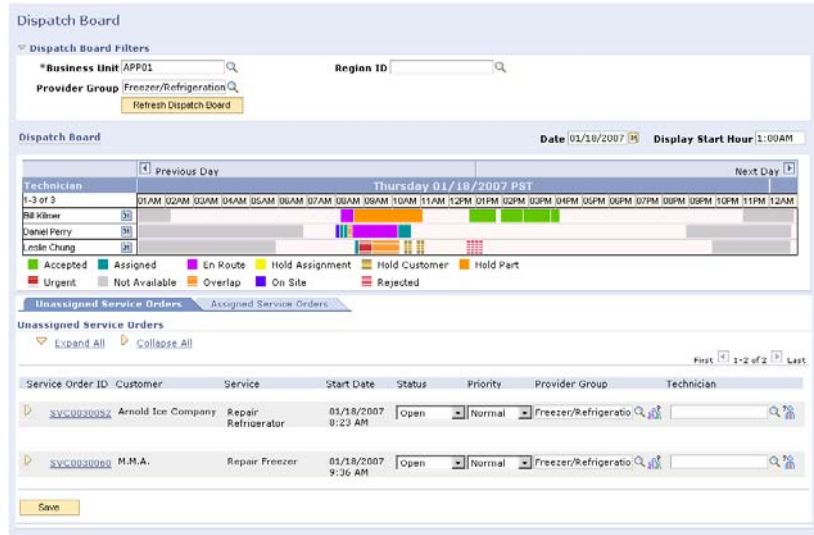
Accurate Order Management

Out-of-the-box integration with Oracle's PeopleSoft Enterprise Order Management and Inventory increases the accuracy of your installed base information by allowing you to automatically propagate orders and check availability. Field service representatives can increase productivity by avoiding rework and errors during the quote process and keeping customers informed of order status.

Preventive Maintenance

Service organizations regularly leverage preventive maintenance to reduce failures, extend product life, and ensure consistent performance. By tracking installed

products down to the component level, field service representatives can provide better preventive maintenance throughout a product's life. With a holistic view of each customer installation, you can easily meet preventive maintenance commitments, uphold contractual obligations, and track maintenance history details.



Intelligent Assignment and Dispatch

The dispatch board provides agents with an intuitive interface to quickly assign and dispatch internal or third-party technicians, based on skills, customer preferences, location, and availability.

Agreements and Entitlements

Defining service level entitlements is an important part of your business, and PeopleSoft allows you great flexibility in identifying the level of service your customers may receive. You can quickly create a simple default agreement to guarantee a basic level of entitlements to all customers for a particular service, product or set of products. For a customer that requires a higher level of service, you can easily create an individualized agreement that specifies the desired levels of entitlements for different combinations of products, sites, and services.

Agreement Search and Selection

PeopleSoft FieldService increases the quality of service and customer satisfaction by automatically identifying and using complete information about service-level agreements and entitlements. Access to critical information, such as interdependent service activities, customer locations, and response/restore times, lets you set expectations appropriately and ensures that customers always receive the level of service to which they are entitled.

Service Order Management

Through comprehensive service order management, PeopleSoft enables more productive field service, better management of operations, and an improved customer experience. Integration with Oracle's PeopleSoft Enterprise Support lets you create and populate service orders directly from cases and eliminate redundant data entry. You can also effectively manage multiple activities, deal with various

time zones, assign multiple technicians to service order lines, and have a complete view of all customer interactions.

Optimize Your Service Resources

One of the most important aspects of running a profitable field service organization is managing your resources in the most efficient and cost-effective way. PeopleSoft FieldService optimizes the entire service management process—from the initial service request, through dispatch and parts allocation, to post-service analytics that measure operational effectiveness.

Intelligent Assignment and Dispatch

Through an assignment engine that sends the right people with the right skills to the right place when needed, PeopleSoft FieldService enables highly effective resource assignment and dispatch. Out-of-the-box integration with human capital management systems enables you to track technicians’ skills and competencies and matches them to the appropriate service needs. PeopleSoft FieldService also automates parts procurement and replenishment, ensuring that technicians always have what they need to complete the job as quickly and efficiently as possible.

Dispatch Avoidance

You can minimize expensive service visits by using more cost-effective channels for service delivery. Integrating PeopleSoft FieldService with PeopleSoft Enterprise Support drives first-call resolution through features such as a solution advisor, troubleshooting scripts, problem-solving techniques, and knowledgebase access. With Web self-service, customers can quickly search, diagnose, and resolve issues on their own, eliminating the dispatch of technicians to service calls that can be resolved without their involvement.

Service Order 01/17/2007 5:15:52PM PST My Time Zone

Save Search Add Service Order Next Previous 360 360-Degree View Personalize

Service Order ID SVC0030058 **Unit** APP01
Customer Shoreview Medical **Customer Value** Platinum ★★★★★
Contact Susan Arb **Status** Open
Priority Normal

Solutions Time Material Expense Notes **Billing** Interaction History Related Objects

Billing Information **Payment Information**

Bill To Customer Shoreview Medical
Bill To Contact Jack Pepper
Bill To Address 2455 Augustine Drive Santa Cla
Bill Currency USD US Dollar

Purchase Order
 Invoice **Payment Terms**
 Credit Card
[Tax Parameters](#)

Billing Details

Expand All Collapse All

Fee	Price	+/-	Adjustment	Type	Reason	Extended Price
Service Fee	75.00	-	25.00	Amount	Missed Restore Other	50.00
Time	0.00	-	0.00	Amount	Other	0.00
Material	0.00	+	100.00	Amount	Other	100.00
Expense	0.00	+	15.00	Amount	Other	15.00
Subtotal Amount						165.00
Additional	0.00	-	0.00	Amount	Other	0.00
Service Exchange Credit Amount						0.00
Total Amount						165.00

Recalculate Totals Clear Adjustments

Save Search Add Service Order Next Previous 360 360-Degree View Top of Page

Integration with Billing

PeopleSoft Enterprise FieldService helps you leverage existing investments by taking advantage of feature-rich billing functionality available through Oracle's PeopleSoft Enterprise Contracts. Functionality includes revenue recognition structure, billing cycle and schedule details, and account rules for applying revenue to the general ledger.

Implementing Best Practices

We offer comprehensive process automation functionality that ensures that best practices are used throughout the service and support organization. Automatic notification and escalation functionality provides real-time status information to everyone who needs to know about a customer, an issue, and its resolution.

PeopleSoft FieldService can also launch one or more service activities, each one encompassing the requisite skills, materials, and other information.

Increase Service Profitability and Reduce Costs

Field service organizations are facing constant pressure to increase customer satisfaction and profitability. With PeopleSoft FieldService, organizations can generate revenue, increase profitability, and control service costs, ultimately leading to increased customer retention and loyalty.

Generate Revenue from Service Agreements

The process of renewing service agreements can be a constant source of frustration, not to mention a paperwork disaster. But with proper management, service agreements can become a major source of company revenue. By leveraging the detailed service history information contained in PeopleSoft FieldService, you can proactively pursue opportunities to renew service contracts and simultaneously improve customer retention.

Multichannel Capabilities

Your support operation should provide customers with a choice of communication methods, including Web self-service, phone, e-mail, and chat. With Oracle's PeopleSoft Enterprise Multichannel Communications, you can increase dispatch avoidance and create significant cost savings for the field service organization.

Customers are given a choice of communicating with your company in a manner that is convenient for them, without burdening the organization with excessive system maintenance.

Service Order 01/17/2007 5:19:20PM PST My Time Zone

Save Search Add Service Order Next Previous 360 360-Degree View Personalize

Service Order ID SVC0030058 Unit APP01
 Customer Shoreview Medical Customer Value Platinum★★★★★
 Contact Susan Arb Status Open
 Priority Normal

Solutions Time Material Expense Notes Billing Interaction History Related Objects

Technician All Technicians

Time Customize Find First 1-2 of 2 Last

Summary Time Entry Comments

Type	Activity	Technician	Start Date	Start Time	End Date	End Time
Activity	4 - Check Pressure Se	Leslie Chung	01/18/2007	9:43AM	01/18/2007	9:46AM
Activity	6 - Preventive mainten	Leslie Chung	01/18/2007	9:54AM	01/18/2007	10:03AM

Add Time Copy Planned Times Total 12 min.

Material Customize Find First 1 of 1 Last

Usage Details Receipt Details Failure Code Item Type Technician

Action	Activity	Item ID	Description	Quantity	Serial ID	Lot ID	Billable
Used	6 - Preventive mainte	10011	Air Cond, Control Unit	1.000			<input checked="" type="checkbox"/>

Add Material

Technician All Technicians

Expense Customize Find First 1 of 1 Last

Summary Description

*Technician	Transaction Date	*Expense Type	*Amount	*Currency	Billable
Leslie Chung	01/18/2007	Mileage	15	USD	<input checked="" type="checkbox"/>

Add Expense

Save Search Add Service Order Next Previous 360 360-Degree View Top of Page

Comprehensive Service Order Management

Through comprehensive service order management, PeopleSoft Enterprise FieldService enables more productive field service, better management of operations, and improved customer experience.

Usability

Optimized usability increases the speed and effectiveness of your interactions with customers. PeopleSoft FieldService contains a streamlined, task-based user interface, prebuilt service management reports, and other features that are designed to simplify navigation and service delivery, eliminate expensive duplication of effort, and better leverage comprehensive customer information.

Real-Time Analytics

The analytic foundation and role-based service analytics of Oracle's PeopleSoft Enterprise Customer Relationship Management (CRM) enable the analysis and insight required to consistently monitor service efficiency, effectiveness, and customer satisfaction. PeopleSoft FieldService provides embedded analytics that allow you to manage field service delivery proactively, which in turn helps you to optimize and run profitable operations. Additionally, the PeopleSoft FieldService Interactive Reports provides key metrics—such as service order aging and technician use—that allow you to reduce costs and protect customer satisfaction.

The Oracle Advantage

By providing complete management of each customer request for service, Oracle's PeopleSoft Enterprise FieldService helps you satisfy your customers while meeting your revenue and profitability goals. Through a combination of comprehensive installed-base management, resource optimization, and cost-reducing functionality, it helps you to maintain profitability, optimize operations, increase technician effectiveness, and improve customer loyalty.

Contact Us

For more information about PeopleSoft Enterprise FieldService, please visit oracle.com or call +1.800.ORACLE1 to speak to an Oracle representative.



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